



AUGUST 2025

Geopolitically Mapping the Western Balkans

A Tale of Merchants,
Missionaries and Miracles

To understand how global geopolitical power shifts affect the Western Balkans, this policy brief provides an interactive geopolitical mapping of the region based on a newly developed Clingendael Institute methodology. Drawing on an extensive expert survey that yielded 85 responses, the brief lays out political relations and economic, security and social interactions between the countries of the Western Balkans, influential regional actors, and great powers, thereby identifying key regional dynamics. Finally, the brief assesses the ramifications of geopolitical dynamics in the Western Balkans for the European Union approach towards the region. Recommendations for the EU include taking a firmer stance towards Western Balkan countries and EU Member States who enable unwarranted foreign influence undermining democracy and stability in the region.

Introduction

Merchants, missionaries, economic miracles, real estate brokers, and activist shareholders – these are not labels one would typically assign to state actors. Yet, in today’s increasingly geopolitically complex world, global, regional, and local powers perform (combinations of) such functions in the Southeast European region colloquially referred to as the Western Balkans: Albania, Bosnia and Herzegovina (BiH), Kosovo, Montenegro, North Macedonia, and Serbia.

Russia’s war of aggression against Ukraine – taking place against the backdrop of an increasingly fragmented world order – does not only bear consequences for the relations between global powers. It especially impacts relations in regions such as the Western Balkans, where the interests of a myriad of powers collide. While the ‘Western Balkans Six’ (WB6) are formally on track to join the European Union (EU),

Russia, Türkiye, the Gulf States and others are equally intent on strengthening their foothold in the region. But even the EU’s approach is not uniform, as EU Member States like Hungary or Italy pursue their own interests towards their Balkan neighbours.

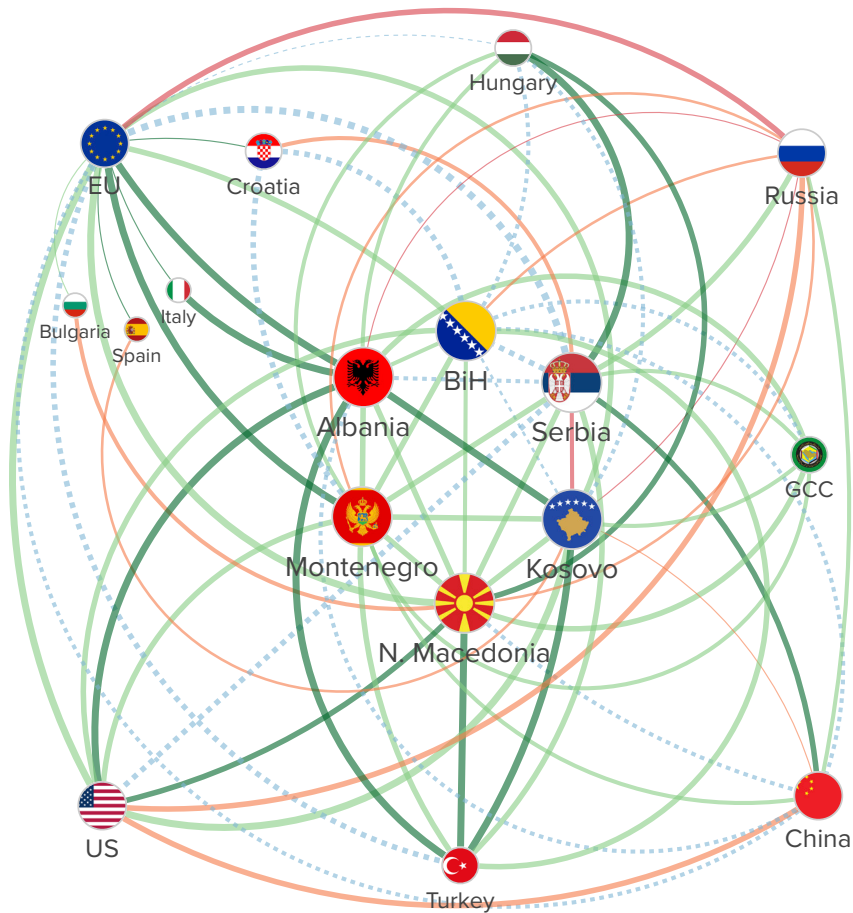
The complexities of shifting international relations in regions like the Western Balkans are not only of academic interest. To formulate effective policies and strategies, the EU and its Member States must acquire a solid ability to interpret evolving geopolitical dynamics accurately. That is especially the case for a region that is 20 years into an EU accession process which has often been described as a key test case for EU foreign policy capability.¹

¹ See for example: Gergana Noutcheva, “[European foreign policy and the challenges of Balkan accession: conditionality, legitimacy and compliance](#)”, Routledge, 2012.

Figure 1 A geopolitical mapping of the Western Balkans



The interactive mapping is available at: www.kumu.io/clingendael-institute/southeast-europe-mapping. Or scan the QR code with your phone.



Legend

- Adversarial/Confrontational
- Somewhat Adversarial/Confrontational
- Ambiguous
- Somewhat Friendly/Cooperative
- Friendly/Cooperative
- Intensity of relations

To understand the geopolitical intricacies of the Western Balkans, this policy brief provides an interactive geopolitical mapping of the WB6 (Figure 1). It thereby addresses three research questions. First, what is the state of relations between the countries in the Western Balkans? Second, how do the Balkan countries relate to regional and major powers? Third, what ramifications do geopolitical dynamics in the Balkans have for the EU approach towards the region?

Following the Clingendael Institute’s geopolitical mapping methodology,² the brief examines

political relations and economic, security and social interactions between the countries of the

a core region and including relevant regional and global powers. As part of this methodology, we sent out a survey to 193 experts in international relations in Southeast Europe, asking them to score bilateral relations on two variables: The quality of political relations between governments, and the intensity of the economic, security and societal interaction between countries. This yielded 85 responses (see the annexes). The outcomes have been used to create the interactive geopolitical mapping in Kumu as presented in the paper. As such, the mapping reflects the geopolitical situation at the time of the data acquisition, which took place between 28 April and 14 May 2025. This policy brief is part of a series of geopolitical mappings of various regions. Earlier publications dealt with the [South Caucasus](#) and [Central Asia](#), while upcoming mappings will include Eastern Europe (in the autumn of 2025) and other regions in 2026.

2 Clingendael has developed a geopolitical mapping methodology to capture and measure changing geopolitical relations between countries, focussing on

Western Balkans, influential regional actors, and great powers. It employs several sub-mappings that lay out key present-day dynamics. Readers can open the interactive mapping in the online tool *Kumu* to explore sub-mappings and descriptions of bilateral relations between all actors – the latter are not included in the brief itself. The brief concludes with recommendations for the EU and its Member States to navigate geopolitical complexities in the Western Balkans.³

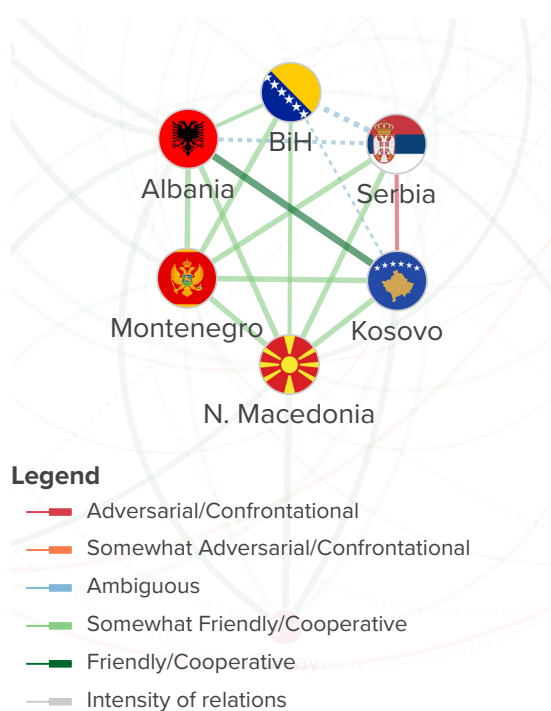
Relations amongst the Western Balkan countries

Various determinants shape regional dynamics and bilateral relationships in the Western Balkans (**Figure 2**): shared (formal) aspirations for EU integration, statehood challenges, ethnic fault lines, similarities in governance styles, and divergent foreign policy orientations.

Many analysts and Southeastern European politicians view the term ‘Western Balkans’ as an EU-imposed analytical construct.⁴ Still, the WB6 display clear elements of a coherent political region. The countries remain formally united in their aspiration to join the EU, which facilitates their political cooperation and ability to overcome bilateral frictions. For example, the EU’s push to improve neighbourly relations has helped Kosovo and Montenegro to resolve a dispute over the demarcation of their joint border.⁵

The WB6 joint EU integration objective has also given rise to enhanced institutional and economic cooperation. The WB6 have set up the Regional Cooperation Council (RCC) which

Figure 2 Relations amongst the WB6 countries



promotes steps towards regional economic integration (through the Central European Free Trade Agreement (CEFTA)) and initiatives towards the mutual recognition of passports and professional qualifications.⁶ Facilitated by such interaction, economic ties between the WB6 countries are generally expanding. Nonetheless, trade with and investments from outside powers like the EU or China have much more significance, owing to the opportunities offered by their investment capacities and market size.⁷

A notable exception to constructive inter-state relations in the region remain those between Serbia and Kosovo (**Figure 3**). Serbia does not recognise Kosovo’s independence, and despite years of EU-facilitated dialogue,

3 The authors would like to thank Marina Ohanjanyan and Kaspar Pucek for their feedback on an earlier version of this brief. We would also like to thank all who contributed to this study by filling out the expert survey (see the annex for an overview of the contributors who explicitly consented to have their name listed).

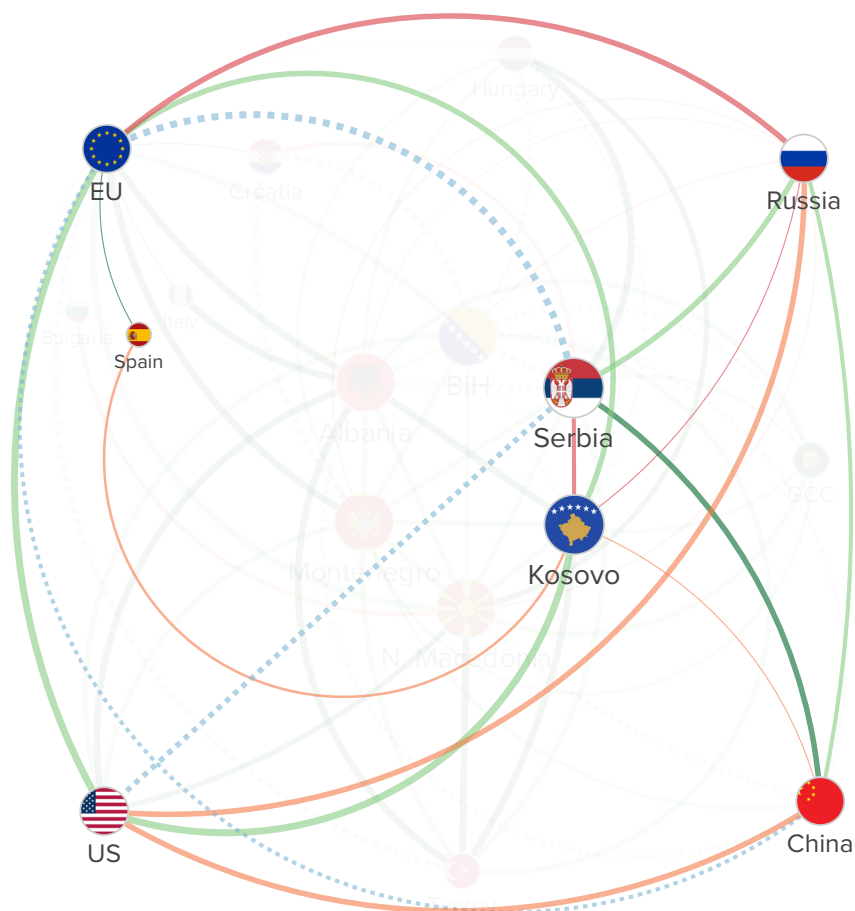
4 Frauke Seebass, “Between ‘Balkan Route’ and ‘European Path,’” *Friedrich Ebert Stiftung*, May 2025

5 European External Action Service, “[Joint statement on the ratification of the Border Demarcation Agreement between Kosovo and Montenegro](#),” March 21, 2018

6 See Regional Cooperation Council, “[Travel, Study, Work](#),” n.d. and CEFTA, “[About](#),” n.d.

7 See Richard Grieveson, Mario Holzner and Goran Vuksic, “[Regional Economic Cooperation in the Western Balkans: The Role of Stabilisation and Association Agreements, Bilateral Investment Treaties and Free Trade Agreements in Regional Investment and Trade Flows](#),” *The Vienna Institute for International Economic Studies*, September 2020.

Figure 3 The Kosovo-Serbia dispute



Legend

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tensions remain high. In the past few years, several episodes of violence were reported in Kosovo’s North, prompting an intervention from NATO’s KFOR military mission in 2023. Serbian influence over Kosovo’s Serb minority remains considerable, while Kosovo maintains a firm stance on its territorial integrity, combating informal Serb parallel political structures.⁸ As normalisation remains elusive, future incidents and broader instability cannot be ruled out.⁹

The Kosovo-Serbia rift also negatively affects Kosovo’s relations with Bosnia and Herzegovina.

Bosnia has not recognised Kosovo due to resistance from the Bosnian Serb *Republika Srpska* (RS) sub-state entity, a close ally of Serbia. BiH’s foreign policy is complicated by internal ethnic divisions and a complex constitutional structure, with parts of the leadership prioritising relations with Croatia, Brussels, Türkiye, Serbia or Russia, depending on political and ethnic affiliations. In foreign policy terms, BiH and Serbia pursue a more multi-faceted approach than the other four, which are firmly committed to Euro-Atlantic integration and aligned with the EU’s Common Foreign Security Policy (CFSP).

On the substate level, ethnic affiliations significantly shape regional dynamics. Serbia maintains close ties with Serb communities and

8 Dimitar Bechev et al., “[Overcoming Inertia in Kosovo](#),” *Carnegie Europe*, May 22, 2025.

9 Wouter Zweers, “[Security and Stability scenarios for the Western Balkans](#),” *Clingendael Report*, March 5, 2025.

politicians in BiH, Kosovo, and Montenegro. For instance, the Serbian government maintains a close influence over the *Srpska Lista* (Serb List) in Kosovo, the country's main Serbian minority party, and has warm relations with the ZBCG bloc, a pro-Serb party in Montenegro.¹⁰ Similar dynamics are prevalent in BiH, where Serbia and Croatia seek to bolster their respective ethnic groups, often to the detriment of BiH's unity and territorial integrity. Croatia's governing party, HDZ, maintains an intimate connection with its BiH counterpart, while Serbian President Aleksandar Vučić has tacitly supported RS President Milorad Dodik in his secessionist ambitions. Cross-border ethnic ties also shape Albania's neighbourly relations. The country wields influence among the Albanian minorities in Montenegro and North Macedonia, and maintains an especially strong bond with Kosovo, grounded in ethnic, cultural, and linguistic connections.

Despite their differences, the six Balkan countries share a similar governance style. All are classified as "transitional or hybrid regimes" according to the Freedom House Nations in Transit ranking.¹¹ Strongmen politics, clientelism, ethno-nationalism and incomplete democratic consolidation shape much of the region's politics, thereby affecting mutual cooperation in various ways. For instance, while Serbia-Albania relations are historically characterised by rivalry, their leaders, longtime 'stabilocrats' Aleksandar Vučić and Edi Rama, find common ground on shared economic projects.¹² A case in point is the Open Balkan initiative for a regional common market between Serbia, Albania and North Macedonia which both leaders used to rally around.¹³

10 European Western Balkans, "[Spajic reshuffles cabinet to include pro-Serbian coalition and Bosniak party](#)," July 24, 2024.

11 Freedom House, "[Countries and Territories](#)," n.d.

12 A stabilocracy "is a regime that includes considerable shortcomings in terms of democratic governance, yet enjoys external legitimacy by offering some supposed stability." A stabilocrat can be defined as the leader of such a regime. See Florian Bieber, "[What is a stabilocracy?](#)," *BiEPAG Blog*, May 05, 2017.

13 Sava Mirković, "[Open Balkan, a failed step in the right direction](#)," *Osservatorio Balcani e Caucaso Transeuropa*, August 20, 2024.

Overall, the WB6 countries maintain cooperative state-level relations, though tensions persist between Serbia and Kosovo and over Bosnia and Herzegovina's statehood. Joint EU integration aspirations, statehood challenges, ethnic fault lines, similarities in governance styles and diverging foreign policy outlooks more broadly determine regional dynamics and bilateral bonds.

Global geopolitical fault lines and local disputes

The Western Balkans have increasingly become a stage for broader geopolitical competition, particularly reflecting the deepening rift between the West and Russia following the Russian invasion of Ukraine (**Figure 4**). While the EU and, to a lesser extent, the United States, remain invested in the Euro-Atlantic integration of the Western Balkans, Russia seeks to obstruct that process and boost its own foothold in the region. In contrast to the EU's institutional approach, Russia favours a more personalised strategy. It cultivates relationships with individual political leaders – most notably in Serbia and *Republika Srpska* – as key gateways into the region. Moscow continues to successfully wield influence on the WB6 countries, employing a range of informal networks including political proxies, the Orthodox Church, oligarchs and malign groups, as well as energy leverage.¹⁴ Through these instruments, Russia has failed to block, but succeeded in delaying the region's EU integration and democratic consolidation.

The global power rivalry described above translates into regional disputes. Both Russia and China stand firmly behind Serbia in its non-recognition of Kosovo, including in the UN Security Council (UNSC). The EU and the US, on the other hand, remain steadfast in supporting Kosovo's self-determination rights and state-building process. For their part, the WB6 leaders seek backing from international powers to bolster their political positions in regional or domestic disputes.

14 Wouter Zweers, Niels Drost and Baptiste Henry, "[Little substance, considerable impact](#)," *Clingendael Report*, August 2023

Figure 4 The EU-Russia Rift in the Balkans

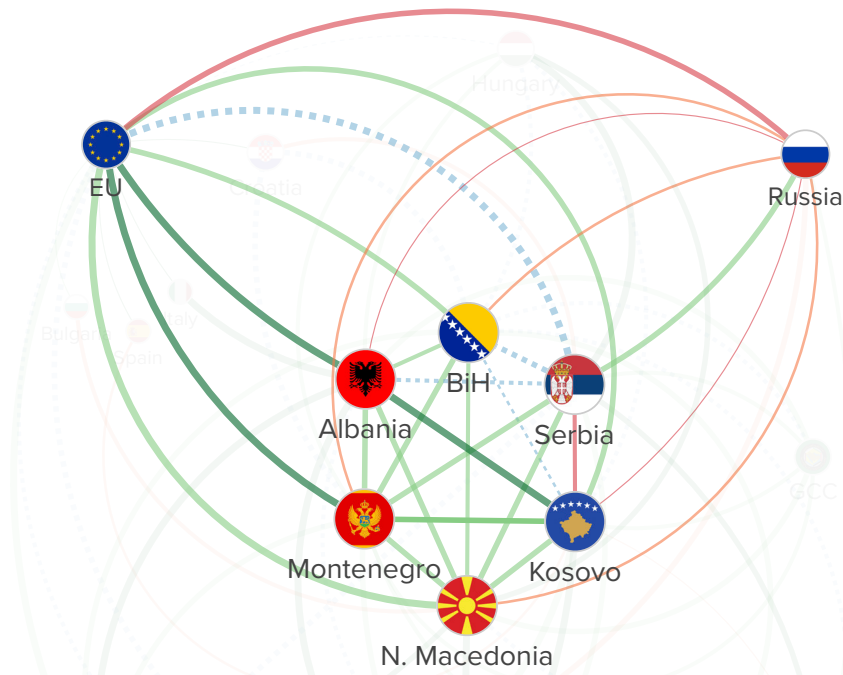
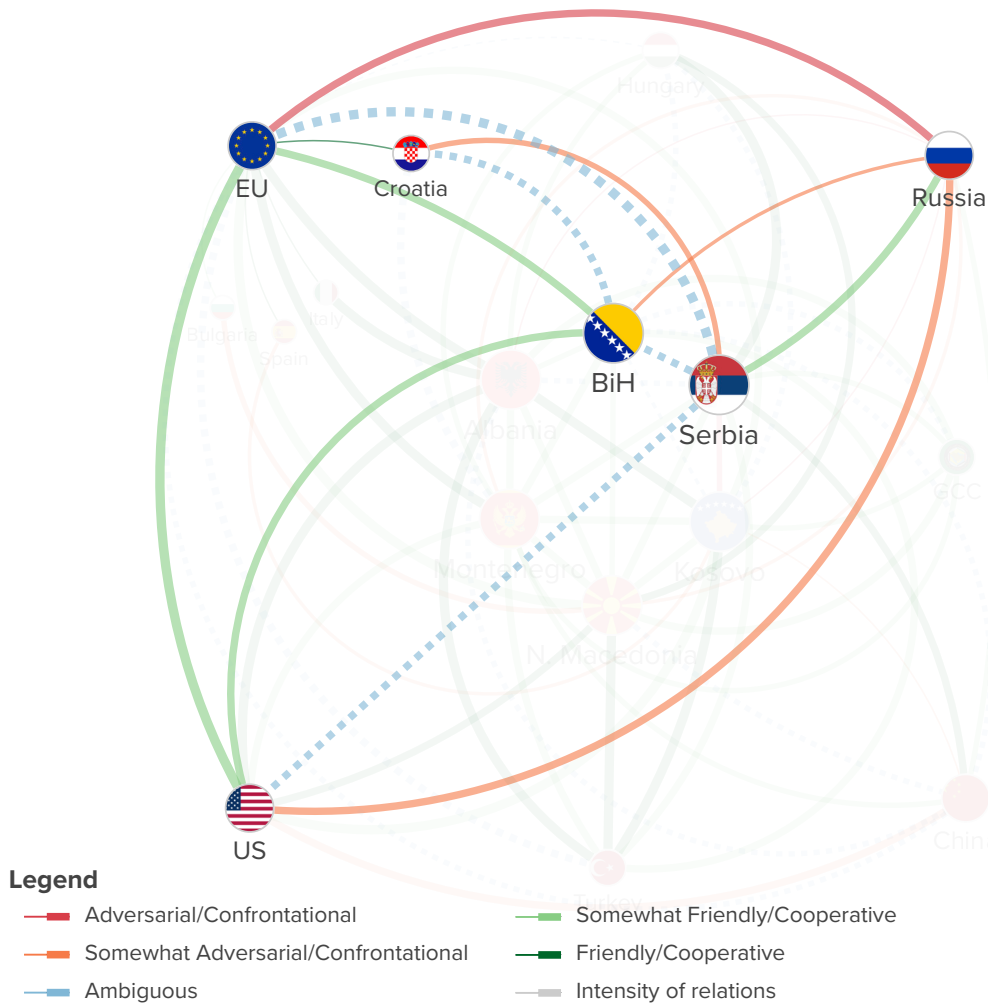


Figure 5 The stakeholders of Bosnia and Herzegovina

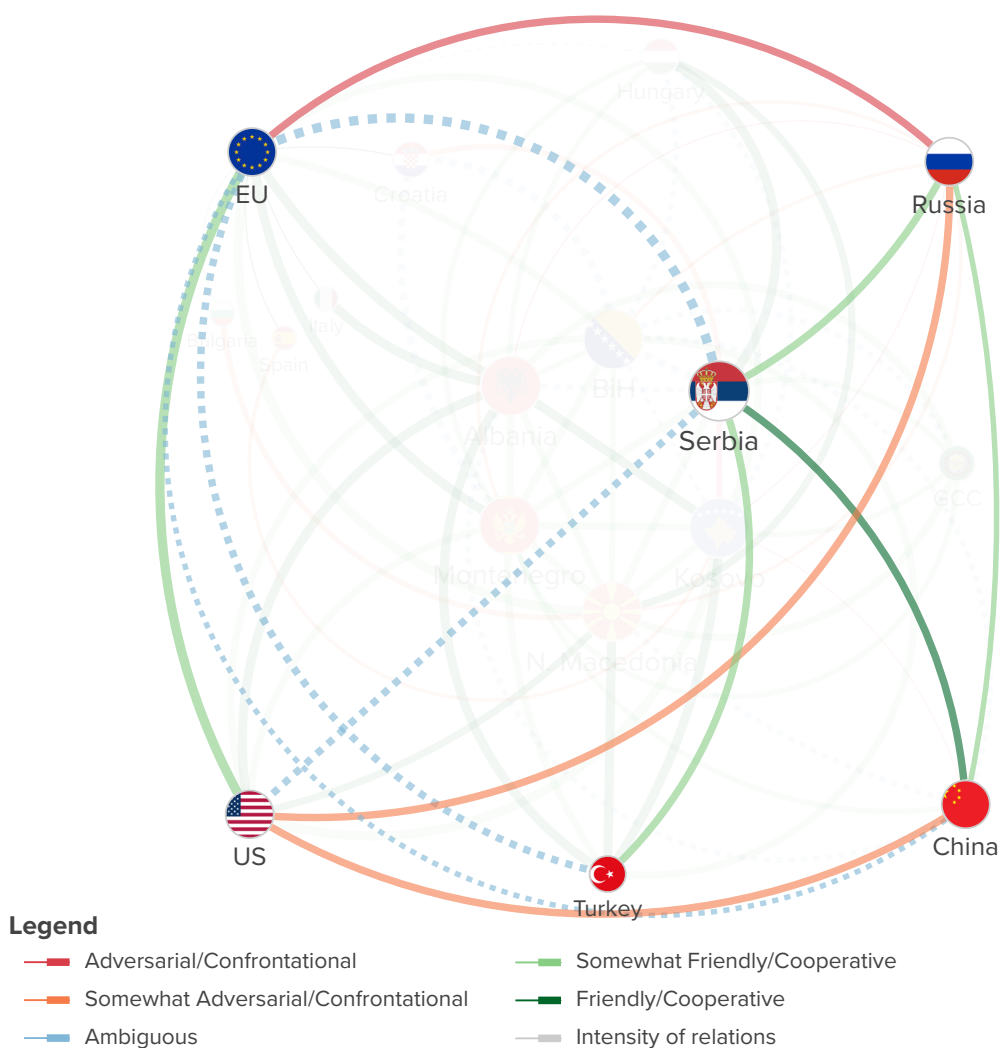


On BiH (Figure 5), Russia presents itself as a key ally of *Republika Srpska*. While only representing a sub-state entity, RS President Milorad Dodik has met Putin on numerous occasions during the past few years. Russia and China support Dodik in his dismissal of the Office of the High Representative (OHR), an international representative with far-reaching decision-making powers in BiH.¹⁵ Conversely, the US and EU deem the OHR a necessary burden. This is exactly because RS secessionist ambitions and

broader political tensions continue to undermine Bosnia's Dayton constitution and, thereby, the stability of the country.

Central to global geopolitical competition in the region is Serbia (Figure 6). The country effectively balances between East and West – pursuing a multi-vector foreign policy aimed at EU accession, while simultaneously maintaining close ties with Russia and China. In past years, President Vučić espoused the strength of his

Figure 6 Serbia's balancing act



15 The High Representative is an international representative of a group of 55 countries involved in BiH's peace process in the 1990s – the so-called Peace Implementation Council – , who was installed by the 1995 Dayton constitution and assigned far-reaching decision-making powers in the country a few years thereafter.

‘steel friendship’ with Xi Jinping, stood proudly next to Vladimir Putin on the 9th of May victory parade in Moscow, and ensured European Council President Costa his “full commitment” to Serbia’s EU accession.¹⁶ He did so when all the while he was organising a Non-Aligned Movement summit in Belgrade, cautiously flirting with the BRICS, and making real estate deals with the Trump family and the Gulf states.¹⁷

Serbia’s balancing act shows that it would be a misconception to think that the Western Balkans are merely pawns in a larger geopolitical game driven by powerful global actors. Local leaders have increasingly shown their capacity to pick their sides carefully, adjusting their rhetoric accordingly. Aware of global and regional powers’ geopolitical interests in their countries, leaders such as Serbia’s Vucic and Albania’s Rama have learned to recognize potential allies and exploit local narratives and issues for political gain. Apart from Serbia’s balancing act, the recent energy deal between Italy, Albania and the UAE provides a case in point. Tirana serves as the key link in the deal and benefits from both sides, receiving renewable energy investments from Abu-Dhabi while exporting produced electricity to Rome.¹⁸ The region’s politics are thus shaped not only by external powers but by local actors who capitalise on the most advantageous offers. External influence ultimately depends on convergence with local interests.

16 See European Council, “Remarks by President António Costa at the joint press conference with President of Serbia Aleksandar Vučić,” May 13, 2025; Ministry of Defence of the Republic of Serbia, “President Vučić: The Friendship of Steel between Serbia and China,” September 22, 2022; Katarina Baletic, “Vučić Attends Moscow Victory Parade Amid Barrage of EU Criticism,” *BalkanInsight*, May 9, 2025.

17 See Tatyana Kecic, “Serbia eyes BRICS partnership as top officials attend summit in Kazan,” *bne intellinews*, October 23, 2024; Sasa Dragojlo, “Serbia Spies Chance to Sell Arms to Fading Non-Aligned Movement,” *BIRN*, October 15, 2021; BBC, “A Belgrade landmark bombed by Nato could get Trump makeover,” June 12, 2025

18 AP News, “Italy, Albania and UAE ink clean energy cooperation deal,” January 15, 2025.

The WB6 as security providers and consumers for NATO

Global geopolitical fault lines are also shaped by the NATO–Russia standoff, which also affects the Western Balkans. Objectively, NATO has the upper hand in the region (Figure 7). Seeking military advancement and protection from Russian influence, 3 out of the 6 Western Balkan countries managed to become full NATO allies in the past decades: Albania (2009), Montenegro (2017), and North Macedonia (2020). The same holds true for EU members like Croatia (2009) and

Figure 7 NATO countries in Southeast Europe



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Slovenia (2004). This is a notable achievement for especially Montenegro, where significant opposition favoured closer ties with Serbia or Russia instead.

The Alliance also cooperates with the three non-member countries in the region: Kosovo, BiH, and Serbia. It has adopted a Partnership for Peace programme and individually tailored Partnership Programmes with the latter two. Since 2010, Bosnia and Herzegovina has a Membership Action Plan that would prepare the country for NATO membership. In practice, Bosnian Serb resistance has undermined decisive steps in that direction. Due to Bosnia's fragile stability, NATO continues to offer support to the EU's military EUFOR Althea mission in the country.

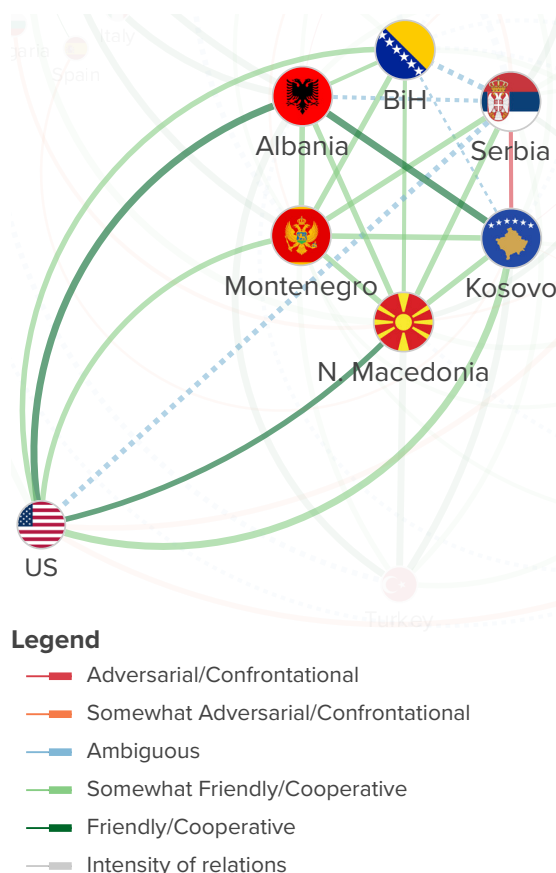
NATO-Serbia relations remain contentious due to the 1999 NATO intervention to end the Kosovo war. Such historical sensitivities and Serbia's multi-vector foreign policy mean that the country does not aspire to join the Alliance. Negative NATO sentiments in Serbian society continue to provide an opening for local leaders and outside powers like Russia to discredit the country's Euro-Atlantic integration.

While in the long run Kosovo hopes to join the Alliance, NATO has remained unwilling to put an offer on the table due to the non-recognition by four of its members. NATO does maintain relations with Kosovo, amongst other things through capacity-building support to the Kosovo Security Force, an initially light-armed volunteer force. However, Kosovo's 2018 decision to transform the KSF into a fully armed force was met with scepticism from former NATO SG Stoltenberg, even if the US welcomed the move.¹⁹ The fact remains that Kosovo, for the time being, is mostly a security consumer due to its tensions with Serbia. Instability risks continue to require military presence through the NATO KFOR mission, which has increased in strength over the past few years due to episodes of heightened unrest.

The United States: From democratic leader to real estate broker?

This analysis has so far treated the West – including the EU, NATO, and the US – as a bloc of actors with broadly aligned interests. Yet, the United States' role in the Balkans (**Figure 8**) has become increasingly unpredictable, shifting from a democracy-driven to a more transactional approach. With the US-China rivalry, the fighting in the Middle East and the continuing Russian war of aggression against Ukraine at the top of the US foreign policy agenda, the Western Balkans seem to have ended up much lower. Following its inauguration, the second Trump administration took some time to make senior appointments related to the Balkans, both in Washington and at US embassies in the region – raising doubts about the consistency of continued US engagement.²⁰

Figure 8 The US role in the Balkans



19 Radio Free Europe, "NATO Chief Warns Kosovo Over 'Ill-Timed' Army Plans," December 5, 2018.

20 See: Dimitar Bechev et al., "Overcoming Inertia in Kosovo," Carnegie Europe, May 2022, 2025.

In the meantime, the US – or rather the Trump family – appears eager to reap the benefits of investment opportunities in the Balkans. The most prominent examples include Trump’s son-in-law Jared Kushner developing luxury tourist resorts on Albania’s coastline, as well as plans for a Trump Tower on the site of the former Yugoslav Ministry of Defence in Belgrade. Owing to environmental, cultural heritage, and corruption concerns, both projects remain controversial amongst the citizens of these countries.²¹

Washington’s broader potential disengagement from European security affairs could also affect the Balkans. While rumours of disengagement have been rebuffed by the US mission to NATO, various media have reported how European countries fear a potential US military pullback from Europe, including from NATO’s KFOR mission in Kosovo.²² The increased uncertainty surrounding US foreign policy means that the EU will need to prepare for taking greater responsibility for European security, including in the Balkans. If the EU does not stand ready to do so, other actors may try to fill a potential diplomatic or security void left by a less active United States.

At the same time, President Trump’s self-styled posture as a peacemaker means that any opportunity for a swift foreign policy win could prompt meaningful or less meaningful renewed US engagement the region. In fact, during and after the NATO summit in June 2025, Trump spuriously claimed that his administration had managed to prevent a military clash between Kosovo and Serbia.²³

China: Merchant and economic miracle

Opposite to the United States in the emerging global geopolitical fault lines is China. Beijing’s main interest in the Western Balkans (**Figure 9**) is to develop the Land–Sea Express Corridor, a component of its Belt and Road Initiative that serves to improve China–EU connectivity. Second, China seeks to exploit economic opportunities in the region itself, as well as to gain a political foothold through its economic engagements.²⁴

China’s relation with Serbia is most encompassing, spanning political declarations, arms trade, police cooperation and tourism facilitation besides trade and investments. China also supports Serbia in its dispute with Kosovo, which it has not recognised over its strict

Figure 9 Chinese relations with the WB6



21 POLITICO, “A Trump-style tower in Belgrade? Serbs say it reopens war wounds,” April 29, 2024. See also: Erblin Vukaj, “Kushner, Rama, Vučić: Triangle of interests at the expense of the public,” *Citizens Albania*, May 17, 2025.

22 IntelliNews, “Potential US troop withdrawal from Europe to leave Kosovo exposed,” February 20, 2025.

23 Kosovapress, “Trump speaks again about Kosovo and Serbia: They were ready for a big war, I stopped it,” June 28, 2025.

24 Wouter Zweers, Vladimir Shopov, Frans-Paul van der Putten, Mirela Petkova & Maarten Lemstra, “China and the EU in the Western Balkans – A zero-sum game?” *Clingendael Report*, August 2020.

approach to territorial integrity related to its own dealings with Taiwan, Tibet and Xinjiang.²⁵ Serbia has displayed a considerable demand for increasing cooperation between the countries in the past years to make use of China's leverage in amongst others the UNSC.

Chinese investments span the entire region and include infrastructure, industry, the telecom sector, energy plants and more. Unlike Russia, China does not deliberately aim to provide a systemic alternative to EU integration. Rather, Beijing opportunistically steps in where the EU is either unwilling or unable to engage, such as in the construction of the Bar-Boljare highway in Montenegro.

Given the divergences in its environmental, public procurement, cyber and other standards, Chinese engagement regularly subverts EU integration efforts. Beijing's preference for investing through direct government-to-government contracts undermines democratic accountability, allowing for corruption to persist.²⁶ As such, while many still see China as an 'economic miracle' that can drive development, Chinese projects have also divided public and political opinion, sparking debates about the dangers of foreign loans, construction delays and debt traps. Montenegro's Bar-Boljare highway is a case in point; upon its signing, the project's costs represented a quarter of the country's GDP.²⁷ All in all, Chinese investments that are incongruent with EU norms will hinder countries like Montenegro as they move closer to EU membership.²⁸

25 Ibid.

26 It should be noted that Chinese capital itself is not inherently corrosive: Its impact depends largely on the governance and institutional context of the recipient country.

27 Marko Sošić, "Montenegro's road ahead: Infrastructure between EU and China," *Clingendael Spectator*, April 14, 2021.

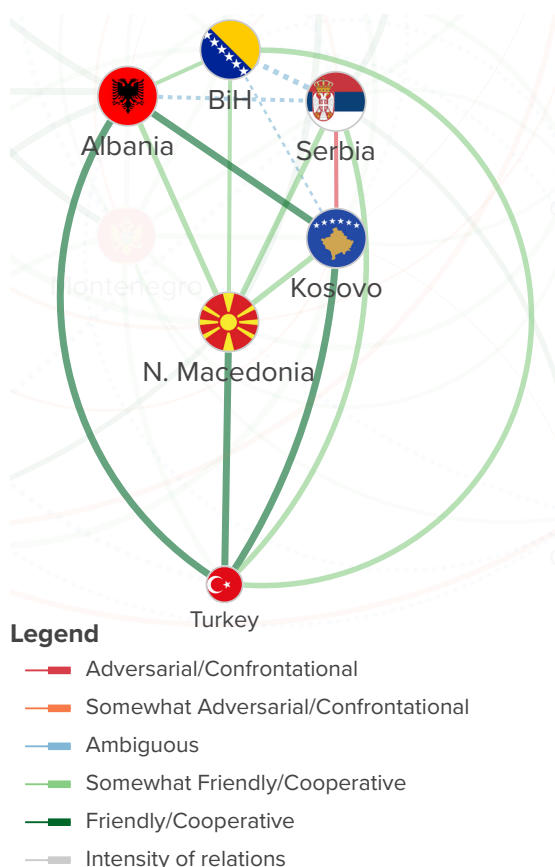
28 Wouter Zweers, Vladimir Shopov, Frans-Paul van der Putten, Mirela Petkova & Maarten Lemstra, "China and the EU in the Western Balkans – A zero-sum game?," *Clingendael Report*, August 2020.

The missionaries: Türkiye and the Gulf Countries

Another type of actors to have also found their way to the Balkans could be described as missionaries: countries seeking to expand their influence through strengthening cultural and religious ties. The Gulf states and Türkiye are key examples. But one should not be fooled – behind such religious and cultural influence lie key political and economic interests.

Driven by a firm belief that global balance of power shifts necessitate more Turkish regional strategic autonomy, Türkiye positions itself in the Western Balkans as a key partner, blending religious and economic engagement with geopolitical and security objectives (Figure 10).²⁹ President Erdoğan's personalised governance

Figure 10 Türkiye's influence on the Balkans



29 See Nienke van Heukelingen & Bob Deen, "Beyond Turkey's 'zero problems' policy," *Clingendael Policy brief*, January 19, 2022, 2.



Figure 11 The Gulf Cooperation Council relations with the WB6



enables swift bilateral engagement and makes him a welcome guest among Balkan leaders.

Given that the country represents the biggest market in the region, Türkiye’s economic focal point in the region is Serbia – to the disappointment of the other Balkan countries. For those, Ankara’s strongest emphasis lies in promoting political, cultural, and religious ties. Such soft power, especially through the Diyanet, Ankara’s chief religious directorate, has been welcomed by but also invited suspicion among the WB6’s Islamic communities, wary of increased foreign influence that would undermine the traditional balance between the region’s Islamic institutions.³⁰

Türkiye also pursues its own geopolitical agenda geared towards asserting its regional autonomy, and more implicitly, towards securing partners in its rivalry with Greece. This is evident in its military agreements with nearly all of Greece’s neighbouring countries. The country is further

expanding its security footprint through joint military training and arms cooperation, including on the proliferation of drones in amongst others Kosovo.³¹ Türkiye’s recognition of and support for Kosovo has not withheld the country from developing a solid pragmatic political and economic relation with Serbia.³²

The Gulf Cooperation Council (GCC) countries, particularly the United Arab Emirates and Saudi Arabia, present themselves in the Western Balkans primarily as economic actors, seeking investment opportunities in amongst others the real estate sector (**Figure 11**). Like Türkiye, the GCC countries also channel resources into religious projects, including the construction of mosques, religious schools, and cultural centres for Islamic communities – especially in Kosovo and Albania. While these initiatives promote soft power, their religious engagement has prompted caution among Western Balkan leaders – especially in Kosovo – who are wary of importing more conservative religious currents.³³ Unlike other international actors, the GCC countries hardly play a role vis-à-vis regional disputes.

The EU as the region’s (not so) activist main shareholder

Despite the influence of others, the EU is still the most powerful stakeholder in the Western Balkans (**Figure 12**). Through its membership offer to the region, the EU’s main objective is to bolster peace, stability, democracy, and economic development in the region, as well as to boost its own global security and competitiveness.

Two decades of EU integration have left most of the WB6 firmly tied to Brussels in institutional, economic, and societal terms. Institutionally, the countries closely cooperate with the European Commission, Parliament and

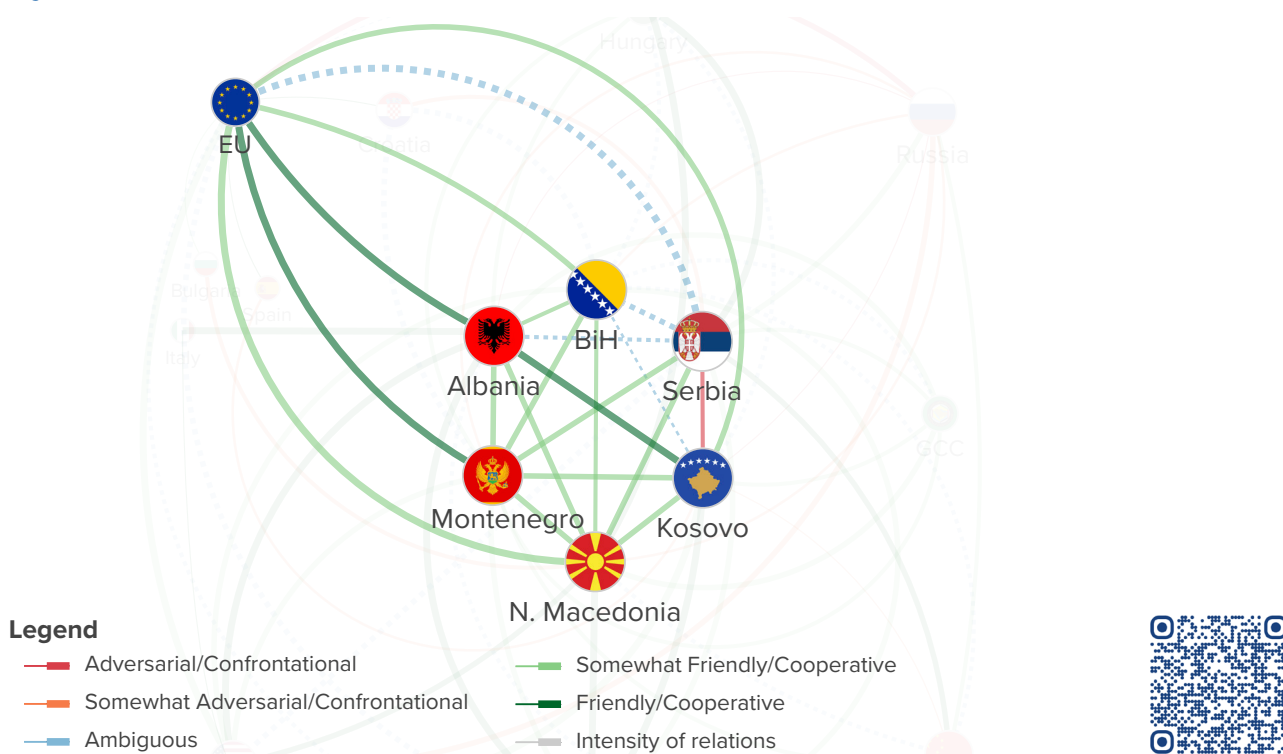
30 Jahja Muhasilovic, “Turkey’s Faith-based Diplomacy in the Balkans,” *Rising Powers Quarterly*, December 2018.

31 Middle East eye, “Turkish Bayraktar drone sales to Kosovo spark anger in Serbia,” July 20, 2023.

32 Giorgio Cafiero, “Turkey and the Intractable Serbia-Kosovo Dispute,” *Trends Research*, December 20, 2023.

33 The Guardian, “Turkey’s gift of a mosque sparks fears of ‘neo-Ottomanism’ in Kosovo” January 2, 2019

Figure 12 EU relations with the WB6



several EU agencies. They are advancing on regulatory convergence with the EU’s Acquis Communautaire, thereby tying themselves to key EU policies.

Societally, the WB6 countries are also closely linked with the EU. Although with negative effects in the countries of origin, WB6 citizens emigrate *en masse* to EU Member States for better economic opportunities. Simultaneously, EU citizens are increasingly discovering the WB6 – notably Albania – as an appealing tourist destination, driving the region’s inclusion into the broader EU public consciousness.³⁴

Politically, relations between the region and the EU remain more complex. Both sides often revert to a blame game for the lack of tangible progress on the EU accession negotiations. While technocratically speaking EU integration steadily continues, politically, EU accession negotiations remain mostly stalled. Only in recent months have Montenegro’s and Albania’s negotiations

formally advanced, though local stakeholders question the sustainability and depth of the encompassing reform processes.³⁵

Political relations with Kosovo have been under strain since June 2023, when the EU introduced temporary measures – such as suspending investments and high-level visits – in response to escalation in Kosovo’s North. This has added to an already complex relationship, marked by the non-recognition of Kosovo by five EU Member States.³⁶

For Serbia and BiH (given the position of *Republika Srpska*), their refusal to align with EU foreign policy undermines political relations with the EU. This has provided the EU with a complex dilemma. While formally pursuing a transformative strategy based on democratic conditionality, in practice the EU seeks to keep the more problematic candidates close for geopolitical reasons. As such,

34 Euronews Albania, “Albania outperforms all European countries in overnight stays,” January 16, 2024.

35 See for example: Biljana Spasovska, “Montenegro: Between Democratic Renewal and Geopolitical Priorities,” *European Democracy Hub*, March 31, 2025.

36 Dimitar Bechev et al., “Overcoming Inertia in Kosovo,” *Carnegie Europe*, May 22, 2025.

especially since the Russian invasion of Ukraine, short-term stability, as well as economic and geopolitical considerations, have dominated the EU's overall approach.

In practice, such an approach has translated into tacit support for 'stabilocratic' regimes by continuing pre-accession funding and taking on significant interest-based projects in the region such as through the 2024 lithium deal with Serbia, falling short of consistently applying democratic conditionality. Problematically, the EU risks losing the support of more pro-democratic forces in the region. Pro-democratic protests that swept through Serbia in the first half of 2025 bore hardly any EU flags.³⁷

It is sometimes argued that a more genuine democracy-driven EU approach could risk alienating Western Balkan governments, and thereby, lead to the geopolitical distancing of their countries. However, this perspective overlooks an important dynamic: distancing from entrenched, 'stabilocratic' regimes may open political space for more democratic actors, who are more likely to pursue meaningful and lasting alignment with the EU. While short-term volatility is possible, a transformative approach remains the most viable path to fostering long-term democratic stability in the region – an outcome that would ultimately reinforce the EU's strategic position.

To achieve such an approach, the EU faces another complexity – uniting 27 Member States, each with its own unique foreign policy vision (**Figure 13**). This is especially challenging given that, when it comes to enlargement, EU Member States remain firmly in the driving seat due to their right to veto any step in the process.

In practice, Member States in recent years have (mis)used their veto power to stall relations with neighbouring countries over bilateral issues. The most prominent example is North Macedonia, whose EU accession process remains stalled over a bilateral blockade from Bulgaria, with detrimental effects on

the country's overall relations with the EU.³⁸ More recently, Montenegro has also failed to open a negotiation chapter over a bilateral blockade from Croatia – a country that, as discussed, also interferes in Bosnia's politics.

The diverging bilateral approaches of EU Member States also continue to hamper Kosovo, which remains unrecognised by 5 EU Member States. Spain maintains the most hardline approach due to its internal political struggle with secessionist forces in Catalonia. Recognising the undermining effects on EU credibility, in 2024 Germany and Slovenia proposed switching to qualified majority voting (QMV) on enlargement but failed to attain the necessary consensus.³⁹

Notable is the role of Hungary. The country is an advocate for the fast-tracked accession of Serbia and other WB countries as it seeks to import illiberal political partners into the EU. Hungary closely supports RS President Dodik, thereby aligning with Russia and going against the EU's support for Bosnia's territorial integrity. As such, Hungary's position often hinders effective EU democratic conditionality and conflict resolution efforts towards the region.⁴⁰

However, EU Member State influence is not inherently incongruent with overarching EU goals. The most evident example is the relation between Italy and Albania. Building on historical foundations, the countries' partnership provides Albania with a strong advocate for its accession to the EU.⁴¹

37 Eva van Zanten, "[Why Serbia's Youth Are Turning Away from the EU](#)," *The Hague Research Institute*, June 2025.

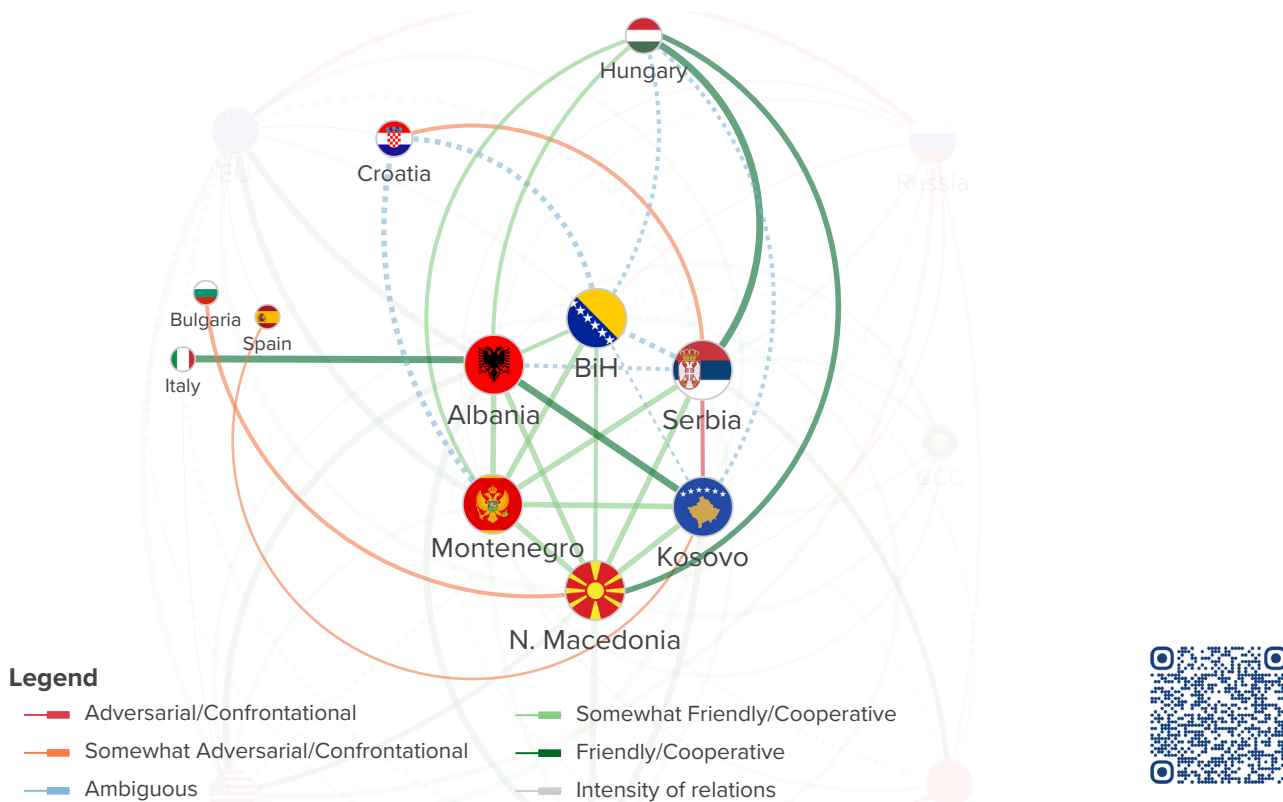
38 Benjamin Couteau et al., "[North Macedonia's EU path: Challenges and opportunities in 2025](#)," *Institut Jacques Delors*, December 12, 2024.

39 Wouter Zweers, Isabelle Ioannides, Zoran Nechev & Nikola Dimitrov, "[Unblocking decision-making in EU enlargement – Qualified Majority Voting as a way forward?](#)" *Clingendael policy brief*, June 2024.

40 As a sidenote, Hungary's role in the Balkans shows that it is overly simplistic to claim, as is often done, that Europe's democratic fault lines align neatly with EU membership. In reality, the divide between pro-democratic and more illiberal forces exists both within EU Member States and among countries outside the Union.

41 Italian Government - Presidency of the Council of Ministers, "[President Meloni's press statement with Prime Minister Rama during her visit to Albania](#)," June 5, 2024.

Figure 13 EU Member State influence on the Balkans



All in all, tensions between the EU’s transformative objectives and its geopolitical interests, along with internal divisions within the Union, mean that its policies towards the region are never as straightforward as the formal accession process implies. As such, while the region remains firmly tied to the EU institutionally, political integration continues to be a challenging endeavour.

Conclusions and recommendations

This policy brief has sought to disentangle the gordian knot of Western Balkan geopolitics. It has made clear how in the region global geopolitical fault lines are reflected in regional dynamics and vice versa. Whether it is the growing rift between Russia and the West, the changing role of the United States, the regional interests of Türkiye, or the Chinese political and economic agenda, they all affect developments within the WB6.

What is clear is that major powers have strongly diverging viewpoints and interests on the region’s disputes, governance, and geopolitical future.

Such divergence is mostly visible in the rift between the EU, NATO, and US on the one hand, and Russia and to a lesser extent China on the other. Russia remains able to act as a spoiler for the Euro-Atlantic integration of the region, holding the potential for destabilisation through its connections with Serbia and *Republika Srpska* in BiH. The role of the US, traditionally closely aligned with the EU, has in recent months become much more unpredictable, posing (potential) challenges for both EU and NATO engagement.

Apart from these major powers, a web of regional and local powers, including EU Member States, pursue their own interests in the region, adding to political complexities. In all of these relations, personalist governance, meaning involvement from leaders like Orban, Putin, Xi, Meloni, Erdogan and Trump, has risen in importance.

This poses major questions and challenges for the EU and its Member States. First, EU conflict-resolution and state-building efforts towards Bosnia and Herzegovina and Kosovo-Serbia are undermined by the diametrically opposed position of especially Russia, which

provides local leaders with a counterweight to EU diplomatic clout. Second, the effectiveness of EU conditionality is undermined through the availability of Chinese, Turkish and GCC economic offers, which are based on divergent standards and come with corruption risks. Local leaders have learned how to reap benefits from multiple sides, thereby undermining EU standard-setting power and, ultimately, EU integration efforts. And third, EU internal challenges, including diverging approaches from its own Member States, notably Hungary, undermine the EU's decisiveness and transformative potential.

Based on this analysis, we make the following recommendations for the EU and its Member States:

A geopolitically conscious EU

- The EU could adopt a firmer stance against **Russian interference in the Balkans**. It could make it clear to especially Serbia and *Republika Srpska* that continued non-alignment with the EU's foreign policy is unacceptable, linking it to the withholding of EU financial support. The EU could further assist other WB countries in shielding them from Russian malign instruments, for example in the disinformation and cyber domains.
- The EU would do well to highlight the negative effects of the emerging **Chinese presence in the Balkans**. While win-win situations can be accomplished, the EU will need to point out to its Western Balkan partners when Chinese engagement exploits regulatory weaknesses and deepens divergences with EU standards. It could follow up such statements more assertively through imposing negative consequences or offering appealing alternatives. As such, the EU's own investment offers towards the region need to remain competitive and attractive.
- The EU could adapt its policies to a potential **shift in the United States' approach** towards the Balkans. The EU and European NATO members would thereby especially need to prepare themselves for playing a larger role in the security field, e.g., be ready to replace US troops in the KFOR mission in Kosovo,

ensuring that a potential void is not filled by other powers.

- The EU should carefully observe **Türkiye's role in the Balkans**. Unlike all others, Ankara has fostered largely positive relations with all six countries. It could increasingly become a strong political force in the region at the expense of the EU. In response to Türkiye's cultural diplomacy in the Balkans, the EU would do well to showcase, through investments and public diplomacy, how EU integration can serve to protect and bolster cultural and religious communities and their traditions. Türkiye's involvement in KFOR and EUFOR Althea offers a basis for security cooperation with the EU and NATO in the Balkans, albeit with continued awareness of Türkiye's specific strategic interests in the region.

An effective EU approach towards regional disputes

- The EU could better account for overlapping interests in the Balkans in tailoring its approach towards **the Kosovo-Serbia dispute**. It would be beneficial for the EU to try and further reduce the leverage of other actors, e.g. through expanding diversification efforts to replace Serb energy dependencies on Russia. Such assistance could complement more restrictive measures to foster constructive engagement from the countries. In the end, the EU would need to make a balanced win-win offer, though in the short-term, smaller trust-building steps could provide a way forward. In this context, the EU would do well to lift its temporary measures on Kosovo.
- **On Bosnia and Herzegovina**, the EU should seek to act as a united front vis-à-vis the country's territorial integrity. EU Member States and institutions can more strongly and openly disagree with Hungary and Croatia which pursue an agenda that is incongruent with the EU's overarching objective for a civic, multi-ethnic, and democratic BiH. The EU institutions could consider imposing stricter rule of law conditionality to that extent. This could also make way for a fiercer EU

response to secessionist steps undertaken by the *Republika Srpska* leadership.

A coherent and effective EU enlargement policy

- While geopolitical momentum has served to bring EU attention back to the enlargement process with the WB6, the EU needs to **remain wary of an overly geopolitical push that is at the expense of its transformative ambitions**. The EU could therefore enhance its democratic conditionality by siding with democratic forces in the candidate countries and more effectively confronting democratic backsliding. While such an approach risks distancing ‘stabilocratic’ elites, it does not irrevocably compromise the countries’ overall geopolitical alignment. Conversely, such an approach may represent the best opportunity to foster an inherently stable and democratic Balkan region that could strengthen the EU upon potential membership.
- The EU and its Member States could take steps towards **a more integrated enlargement approach** which would prevent single Member States from capturing the accession process for their unilateral interests. While shifting towards qualified majority voting in the intermediate stages of the accession process could be helpful, a solid political response by EU Member States and institutions towards unconstructive Member States would be most effective.

Annex – results of the expert survey geopolitical mapping

Table 1 Aggregate scores for each relation

From	To	Quality of political relation	Intensity of interaction
Albania	Bosnia and Herzegovina	6.7	5.4
Albania	China	5.4	5.6
Albania	European Union	9.3	9.5
Albania	Gulf Cooperation Council	7.6	7.2
Albania	Hungary	6.7	5.5
Albania	Italy	9.8	9.6
Albania	Montenegro	7.9	7.1
Albania	North Macedonia	7.3	7.2
Albania	Russia	1.8	1.2
Albania	Serbia	5.7	5.4
Albania	Türkiye	8.6	8.6
Albania	United States	8.7	8.6
Bosnia and Herzegovina	China	4.9	4.1
Bosnia and Herzegovina	Croatia	5.6	7.4
Bosnia and Herzegovina	European Union	6.4	7.7
Bosnia and Herzegovina	Gulf Cooperation Council	5.5	4.5
Bosnia and Herzegovina	Hungary	4.7	4.9
Bosnia and Herzegovina	Montenegro	7.0	6.5
Bosnia and Herzegovina	Russia	3.4	3.7
Bosnia and Herzegovina	Türkiye	6.9	6.5
Bosnia and Herzegovina	United States	6.5	6.0
Kosovo	Albania	8.5	8.9
Kosovo	Bosnia and Herzegovina	4.7	3.7
Kosovo	China	2.0	1.4
Kosovo	European Union	6.2	7.6

From	To	Quality of political relation	Intensity of interaction
Kosovo	Gulf Cooperation Council	6.2	5.0
Kosovo	Hungary	4.7	4.4
Kosovo	Montenegro	7.2	6.4
Kosovo	North Macedonia	7.5	7.9
Kosovo	Russia	0.5	0.4
Kosovo	Serbia	1.3	4.3
Kosovo	Spain	3.4	2.6
Kosovo	Türkiye	8.5	8.4
Kosovo	United States	7.9	8.4
Montenegro	China	6.0	5.4
Montenegro	Croatia	5.4	6.9
Montenegro	European Union	8.3	8.9
Montenegro	Gulf Cooperation Council	7.2	5.8
Montenegro	Hungary	6.6	5.4
Montenegro	Russia	3.7	2.8
Montenegro	Türkiye	7.4	6.4
Montenegro	United States	7.9	7.0
North Macedonia	Bosnia and Herzegovina	7.2	5.6
North Macedonia	Bulgaria	2.8	4.7
North Macedonia	China	5.5	4.7
North Macedonia	European Union	7.0	8.4
North Macedonia	Gulf Cooperation Council	6.6	7.9
North Macedonia	Hungary	8.7	5.9
North Macedonia	Montenegro	8.0	6.7
North Macedonia	Russia	3.6	3.3
North Macedonia	Serbia	8.0	7.9
North Macedonia	Türkiye	8.4	8.3
North Macedonia	United States	8.2	7.8
Serbia	Bosnia and Herzegovina	4.1	6.6
Serbia	China	8.1	8.0
Serbia	Croatia	3.3	4.9
Serbia	European Union	5.3	8.4
Serbia	Gulf Cooperation Council	7.1	5.5
Serbia	Hungary	8.9	8.5
Serbia	Montenegro	6.2	7.6
Serbia	Russia	7.0	7.2
Serbia	Türkiye	6.1	6.0
Serbia	United States	5.8	6.1

Table 2 Number of respondents per focus country

Country	Number of respondents
Albania	12
Bosnia and Herzegovina	15
Montenegro	9
North Macedonia	18
Kosovo	15
Serbia	16
Total	85

Table 3 Contributors to the expert survey*

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* Only individuals who explicitly consented to have their names listed are included in this overview.

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