

Foreign Authoritarian Influence in the **Western Balkans**



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- contribute to and develop a critical public discourse and policy making that is based on knowledge and evidence.

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INTRODUCTION

The project sets out to create a tool for detailedly measuring hostile influence by **authoritarian states**, such as the Russian Federation, the Chinese People's Republic, Turkey and the Gulf states. In particular, the project aims at understanding the nature and quantifying the degree of authoritarian influence in the Western Balkan region, specifically in **North Macedonia, Montenegro, and Bosnia and Herzegovina**.

The three Western Balkans countries have been chosen since they bear a number of political, social and economic resemblances. They share similar features regarding size, population or geographical stance; although they differ significantly in many other aspects, such as the structure of their economies, energy mix, ethnic and religious composition, political structures and institutional specificities. As a result of these differences, there is enormous variation in the nature and depth of potential leverage third countries can exploit in order to exert authoritarian influence in the region. Yet, based on their similarities, it is still possible to do conduct a comparative analysis.

The goal of the project is to discover and assess patterns of influence-seeking and comparing these patterns. To help achieve this goal, we developed the **Foreign Authoritarian Influence Index (FAII)**, which exclusively measures active influence-seeking activities. We also included in the study vulnerabilities, both the aptitudes and inherent characteristics of individual countries and those created by the political approach of the given country's leadership. Hence, although vulnerabilities are crucial to map and to prevent malicious activities, they are excluded from the FAII itself. We present them in a separate chapter to give a clear picture about the socio-economic situation, and to pinpoint specificities.

The study gives an overview on the vulnerabilities of the three examined countries, including exposure, political attitudes and receptivity in terms of foreign authoritarian influence. It provides the audience with an overall picture on what the main socio-economic characteristics of the given countries are, and what characteristics make it vulnerable to authoritarian influence.

Going country by country, the report also provides a quantified background by assessing **the five examined aspects of authoritarian influence**: religious soft power and influence via churches, political influence via symbolic politics, influencing political opinion, economic and technological influence, and educational influence. This part is followed by a comparative chapter that sums up the findings detailed in the index, and a chapter offering policy recommendations.

The present report is a part of a project titled Understanding and Responding to Foreign Malign Influence and was supported by the National Endowment for Democracy. The co-authors of the report are Anida Šabanović, Mahir Sijamija and Haris Ćutahija (Foreign Policy Initiative BH), Milena Gvozdenović (Center for Democratic Transition), Marko Pankovski (Institute for Democracy „Societas Civilis“), Dorka Takácsy and Dominik Istrate (Political Capital), Veronika Víchová (European Values).

The objectivity of the research results and the coherence between the textual reasonings and the given scores were examined as part of an impartial and independent review carried out by Ms. Barbora Chrzova, an expert on politics, identity and society in the Western Balkans.

STRUCTURE AND METHODOLOGY

Exposure, political attitudes and receptivity

The narrative part does not receive a score, but its content effectively gives a broader context to the authoritarian influence-seeking measured by the Index, completing it with receptiveness and responses from the examined country.

It describes in detail the characteristics and exposure that refer to a level of vulnerability for the given country, while excluding particular actions by parties or the state leadership. It encompasses social and ethnic composition, state secularity, media and cultural relations in general, the presence, wealth and impact of oligarchs on their narrow environment, energy supply diversity and economic vulnerabilities. This part also assesses the political attitudes and receptivity to foreign authoritarian influence. It analyses political rhetoric, and potential foreign influence on legislation (examining whether there were any bills submitted that particularly favor a third country).

Country assessments in 5 categories

The Foreign Authoritarian Influence Index is a **numerical rating based on pre-existing, available data-sets and expert surveys**. FAIL consists of 5 sub-indexes, and measures the active influence-seeking of authoritarian countries. A country's FAIL scores are calculated as follows:

Each sub-index is introduced by a text accurately describing the measured and examined propriety. There is a score provided to each sub-index **on a scale of one to seven** (where 1 stands for no foreign authoritarian influence and 7 for very strong influence), with benchmarks (at 1-3-5-7) to help quantify the nuances. The partners measured the given characteristic based on accessible datasets and gave a score on the abovementioned scale. They also conducted **interviews with experts** on the aspects of foreign authoritarian influence and asked them to evaluate the situation with a score. The sub-indexes are calculated as the average of the scores given by the partners and the experts, rounded to the nearest integer.

The sub-indexes and the scales of their rating are set as follows:

1. Churches in politics and public life: Religious soft power and material influence

This indicator measures influence-seeking through religious means, political messaging on behalf of the church, clerics' mobility, and financial support for churches from these third countries. As aspects of evaluation – among others – the following questions were asked: Is there political messaging coming from the church? Is it a common practice for church staff to be sent abroad for education? Are there clerics sent from authoritarian countries? Do churches receive financial support from abroad; e.g., for reconstruction and renovation projects of buildings and religious memorial places?

Score	Empirical assessment
1	No financial or other known support through churches. Churches do not voice political views at all. Church connections do not exist, educational or staff mobility is not prevalent.
2	
3	Little financial support for churches from abroad, and only occasionally, it has marginal importance in the financial stance of the given local church. Churches very rarely voice opinions related to politics. Church connections do exist, but their impact is marginal, and reach only an insignificant number of clerics.
4	
5	Considerable and regular financial support from abroad to the church, however, the church does not strongly depend on it, it would be able to operate without these funds. The church and its representatives rather often voice political views, aligning with the interests of the given foreign country. Staff mobility is considerable, but does not have major impact on either the local church or public opinion.
6	
7	Local church depends financially on a church abroad, receives massive, regular financial support. It is very common for church staff to be sent abroad for education, and a considerable number of clerics from abroad are sent to the local church, having a visible impact. Church and church leaders have strong voice in the public discourse and regularly take stance in political issues and debates.

2. Political influence – symbolic politics

This indicator measures the gestures made by politicians, political incidents, memorandums of cooperation, high-level visits, their impact on decision-making, and the extent of media coverage on these gestures. The following questions were asked: Were there gestures made by politicians from Russia, China, Turkey and the Gulf states? How many high-level meetings were organized in the examined period? Were there gestures made by local politicians? How many high-level meetings were organized in the examined period? How do party programs address issues concerning these authoritarian countries according to experts?

Score	Empirical assessment
1	There were no significant gestures made by politicians of Russia, China, Turkey, the Gulf states towards the given country, or vice versa. No particular alignment between local parties' programs with the foreign policy interests of authoritarian countries.
2	
3	There have been a few of symbolic gestures made, receiving little media coverage, which had marginal impact on policy-making. Political parties' programs regarding authoritarian countries are not particularly assertive or aligning with their interests.
4	
5	Numerous gestures were made, receiving massive media coverage, which had considerable impact on policy-making. Certain party programs align with the interests of authoritarian states, but no financial support is suspected.
6	
7	Many and/or strong gestures on political level. Impactful meetings and public incidents were prevalent, heavily covered by media. Some local political parties clearly have an agenda aligning with the interests of authoritarian countries, or they are even financed by them.

3. Public opinion influencing

This indicator measures influencing campaigns aimed at public opinion. Relevant electoral events, elections, referenda, etc. accompanied by campaigns sponsored and/or backed by foreign authoritarian countries, purchases on the media market and foreign-supported NGOs influence are assessed. Questions asked were the following: were there relevant electoral events, elections, referenda, etc. accompanied by campaigns sponsored and/or backed by foreign authoritarian countries? Have there been major acquisitions in media portfolios and outlets by authoritarian countries or business circles tied to their leaderships? Do NGOs backed by authoritarian regimes exert influence in the region? Are fake news campaigns conducted?

Score	Empirical assessment
1	No electoral events were accompanied by campaigns sponsored and/or backed by foreign authoritarian countries. No media portfolios or outlets are known for being owned by circles of foreign authoritarian powers. Authoritarian NGOs are not present, or if so, have no impact on the society. No fake news campaigns conducted to undermine pro-Western causes.
2	
3	Minimal possibility of influencing campaigns launched or backed by any authoritarian country. In the media space, marginal impact is reached by portfolios or outlets owned by circles related to the leadership of authoritarian countries, and their proportion of ownership is not significant on the media market. NGOs backed by these countries are present, but have marginal reach or impact on society. Although there are rare fake news campaigns they do exist, generally focusing on pro-Western causes, with marginal or negligible impact.
4	
5	Strong possibility of influencing campaigns backed by authoritarian countries. Significant part of the media portfolio is in the hands of circles close to the leadership of authoritarian countries, with considerable impact on the public opinion. NGOs backed by authoritarian regimes exert considerable influence on the public. There are considerable fake news campaigns launched to discredit pro-Western causes or stances.
6	
7	There have clearly been campaigns backed/sponsored by authoritarian countries. There have been significant acquisitions of media portfolios by circles tied to authoritarian countries. NGOs backed by foreign countries have strong influence on public opinion. Fake news campaigns conducted on large scales to discredit and undermine pro-Western causes and stances, with strong impact on the public opinion and discourse, or even setting the agenda.

4. Economic and technological influence

This indicator consists of two parts assessed together, since influence-seeking activities regarding the economic and technological spheres are often intertwined. The questions asked were the following: have authoritarian powers been exploiting their position when (re-)negotiating energy supply-related contracts and deals in the examined period? Were there major infrastructural investments made by foreign countries? Was their financial plan and background beneficial to the recipient country according to the expert community? Is there any influence exerted via the banking system? Has China/Russia/Turkey exploited their leverage on the country via tourism? Are there high priority investments? How transparent is the process of 5G installation? Was there real competition? What position did the country take regarding Huawei, and did this position change?

Score	Empirical assessment
1	<p>No, according to available data and experts' assessment, authoritarian powers did not exploit their position when (re-)negotiating energy supply-related contracts. No major infrastructural investments backed by these countries, or if there are, they are considered advantageous to the recipient country according to the expert community. Also, no influence in the banking sector. There is no leverage on the Balkan country via tourism, or if there is, it is marginal or not exploited.</p> <p>There are no high priority investments. 5G installation is transparent with real competition. The country's position on Huawei is in line with the US's, and did not change during time.</p>
2	
3	<p>According to the assessments, the (re-)negotiation of the energy supply contracts was not quite advantageous to the recipient country, but it is still on the 'fair' side. A few major infrastructural projects were realized without scandals, they seem rather reasonable. They do not seem to be financed by particularly disadvantageous financial plans either. There is mild, or suspected influence in the banking sector, but it is very limited. There have been hints that leverage via tourism could be exploited, but not seriously, or it would have marginal effects on the given country.</p> <p>There are a few high priority investments, the 5G installation process is rather transparent, but with very limited or controlled competition. The country's leadership is rather hesitant, or changed its point of view regarding Huawei recently.</p>
4	

Score	Empirical assessment
5	<p>There are numerous high priority investments. The 5G installation process is not quite transparent, and there is no real competition, authorities apply secretive measures, although it is still possible to access data on the process at least partially. The leadership is rather pro-Huawei, but does not seem to be entirely committed. There might have been a shift in position regarding this topic.</p>
6	
7	<p>The authoritarian state clearly exploited its position in the (re-)negotiation of contracts. Large scale infrastructural investments, backed by an authoritarian state, have been very disadvantageous to the recipient country according to the expert community and/or hard data. There is a strong influence in the banking system. Also, the leverage on the country via tourism is huge, and is actively being used to blackmail and influence.</p> <p>There are many high priority investments of large volume. 5G installation is entirely non-transparent, total lack of competition, and a strongly secretive behavior is dominant on the authorities' side. No competition known, the leadership is openly pro-Huawei and there are large investments of the company in the country.</p>

5. Educational influence

This indicator measures authoritarian third countries' influence-seeking in the fields of education, research and science. The relevant questions were related to new university partnerships forged, and scientific agreements concluded (staff mobility, research capacities, facilities, new campuses, etc.).

Score	Empirical assessment
1	No university partnerships or scientific agreements concluded.
2	
3	A few partnership and scientific agreements established, on an occasional basis, but with no significant financial support and/or small overall capacity. Also, the public does not know about it, it does not receive significant media attention.
4	
5	Certain university partnerships and scientific agreements are established, primarily long-term ones, with financial support from the authoritarian country, and/or of significant capacity. It receives decent attention from the media and is quite known by the public.
6	
7	Significant long-term university partnerships concluded, accompanied with strong financial support from an authoritarian country. Scientific agreements concluded, with large media attention.

COUNTRY REPORTS

Bosnia and Herzegovina

Exposure, political attitudes and receptivity

Bosnia and Herzegovina declared its sovereignty in October 1991 and independence from the former Yugoslavia on 3 March 1992, after a referendum which resulted in ethnic war between Bosniaks, Bosnian Serbs and Bosnian Croats. **After the Dayton Agreement in 1995, Bosnia-Herzegovina became a democratic country – with a new, state constitution – comprised of three entities: the Federation of Bosnia and Herzegovina (FBiH), Republika Srpska (RS) and the Brčko District.** ¹

According to the 2013 census – the results of which have been contested by RS – Bosnia and Herzegovina has a total population of 3.53 million people. The FBiH has a population of close to 2.22 million, an estimated 1.23 million live in Republika Srpska, while the Brčko District is home to more than 83,000 people. Bosniaks now make up 50.11 percent of the population, Serbs comprise 30.78 percent and Croats account for 15.43 percent of the population. The census also “confirmed that the two larger entities have a clear ethnic structure, with 92.11 percent of all Bosnian Serbs living in the RS, and 91.39 percent of Bosnian Croats and 88.23 percent of Bosniaks living in the Federation.”² Among those with religious affiliation, the majority of Serbs belong to the Orthodox Christian church, Croats are mostly Roman Catholic, with most Bosniaks being Sunni Muslims. Tensions between the aforementioned ethnic groups were expressed in terms of religion. Fundamentalists existed on all sides; in propaganda outlets the Bosnian War took on some features of a “religious war,” supported by views of religious leaders and religious symbols were used for nationalist purposes.³ Historical inter-ethnic stereotypes and prejudice were further solidified by the experiences of war and the current situation still impedes the development of inter-ethnic post-war relations.

The media situation in the country is **also worrying**. The study titled “Researching Media Freedoms in Bosnia and Herzegovina in 2019” reveals worrying trends in the attitude of the country’s citizens towards their media. In the last six years, journalists of BH, an independent journalistic association, documented 121 cases of violence, 44 physical attacks, 21 death threats and 48 serious cases of harassment or verbal pressure against themselves. **Yet, violence against media workers is increasingly accepted in Bosnia and Herzegovina (BiH).** Only 66% of BiH citizens consider the media of their country as trustworthy. While doubts in the professionalism of journalists are increasing, most people do not believe in the existence of media freedom in BiH (80%). One reason is certainly the interdependence between politics, media and journalists. ⁴

Bosnia and Herzegovina has a **transitional economy with limited market reforms**. A highly decentralized government hampers economic policy coordination and reform, while excessive bureaucracy and a segmented market discourage foreign investment. **Bosnia and Herzegovina’s top economic priorities are: acceleration of integration into the EU; strengthening the fiscal system; public administration reform; World Trade Organization membership; and securing economic growth by fostering a dynamic, competitive private sector.**⁵ In 2017, Bosnia and Her-

Herzegovina exported \$6.25B and imported \$10.1B, resulting in a negative trade balance of \$3.83B. The top export destinations of Bosnia and Herzegovina are Germany (\$900M), Italy (\$827M), Serbia (\$612M), Austria (\$570M) and Slovenia (\$560M). The top import origins are Serbia (\$1.24B), Germany (\$1.18B), Italy (\$1.14B), Croatia (\$744M) and China (\$673M).⁶ Bosnia and Herzegovina (BiH) is rich in natural resources indispensable for the production of electrical energy. The Federation of Bosnia and Herzegovina (FBiH) and the Republika Srpska (RS) are majority owners of power utility companies and by extension, most mines, hydropower plants and fossil-fueled plants in BiH. Some lesser ownership over the energy sector is in the hands of private interests that have been given concession permits for mining, construction and utilization of hydropower and fossil-fueled plants or the opportunity to build wind or solar power plants.⁷

The influence of certain countries on Bosnia and Herzegovina is complex and not so straightforward. **Russia, for example, has a strong influence on Serb political structures** in Bosnia and Herzegovina, which manifests as support for some controversial decisions and legislation in Republika Srpska, where the majority are Serbs, as well as in the Peace Implementation Council, where they almost always abstain from voting on decisions directed at sanctioning Serb representatives or Republika Srpska's legislation that has been contested by the Constitutional Court. **The president of SNSD (the Alliance of Independent Social Democrats, a major Serb political party in BiH) regularly meets with the Russian ambassador and consults with him as well, especially when it comes to the role of the international community.** He is also using these consultations and formal Russian support as political capital among his party's base.

On the other side, **Bosniak parties, especially the SDA (the most popular one) are using the relationship with Turkey and some Arab countries for the same purpose.** SDA has a special relationship with the Turkish president's AK Party (AK and SDA representatives regularly attend each other's parties' major events, congresses, etc. The Sultan, as the party's base call Erdogan, on one occasion stated that the late Alija Izetbegović (first president of BiH and the father of the current SDA president) has left him Bosnia and Herzegovina as his inheritance.⁸

The complex political system of BiH has one positive side – it restricts foreign influence to a point. At the same time, the internal divisions and alignment of external actors along them enable external factors to meddle in internal affairs and incite internal conflicts. **Most authoritarian countries interfering in the affairs of BiH have influence on only one of three ethnic groups' political representatives.** However, at the state level, for all the major decisions and legislation, a wide consensus is needed, which includes the votes from representatives of all three groups

1. Churches in politics and public life: Religious soft power and material influence

Score: 5

Score	Empirical assessment
1	No financial or other known support through churches. Churches do not voice political views at all. Church connections do not exist, educational or staff mobility is not prevalent.
2	
3	Little financial support for churches from abroad, and only occasionally, it has marginal importance in the financial stance of the given local church. Churches very rarely voice opinions related to politics. Church connections do exist, but their impact is marginal, and reach only an insignificant number of clerics.
4	
5	Considerable and regular financial support from abroad to the church, however, the church does not strongly depend on it, it would be able to operate without these funds. The church and its representatives rather often voice political views, aligning with the interests of the given foreign country. Staff mobility is considerable, but does have major impact on either the local church or public opinion.
6	
7	Local church depends financially on a church abroad, receives massive, regular financial support. It is very common for church staff to be sent abroad for education, and a considerable number of clerics from abroad are sent to the local church, having a visible impact. Church and church leaders have strong voice in the public discourse and regularly take stance in political issues and debates.

According to the 2013 census ⁹, Bosnia and Herzegovina has **four traditional religious groups** - Sunni Muslim (50,7%), Orthodox Christian (30,75%), Roman Catholic (15,19%) and Jewish (0.01%). In this paper, we are taking into account the first three because they cover more than 95% of the population. All three groups have their registered religious communities at the state level as required by law¹⁰, along with the rest of the registered communities and churches.

The **Bosnian Orthodox group** traditionally belongs to the Serbian Orthodox Church with headquarters in Belgrade, which is **important regarding the influence of the Russian Orthodox**

Church. There is a deep historical connection between these two churches and their collaboration is substantial. There is no record available on regular financial flow between them but there are some occasional donations, mostly for building temples¹¹. The Serbian Orthodox Church recognizes their Russian counterpart's seniority in certain issues, but their decisions are not obligatory, since the orthodox churches are autocephalous. The latest example of the special bond between those two churches is the Russian Orthodox Church's support for the Serbian Orthodox Church in case of the recent issues in Montenegro.¹²

China does not have any influence over the religious communities and churches in Bosnia and Herzegovina. It is an atheist state and it has a negative image in religious communities and churches for a number of reasons, including the treatment of certain religious groups in China.

The Islamic Community in Bosnia and Herzegovina is the one and only Muslim community in Bosnia and Herzegovina, and Sandzak (the cross-border region between Montenegro and Serbia), Croatia, Slovenia and Serbia, Bosniak Muslims outside their homeland and other Muslims accept it as their own¹³. **It is not overly influenced by Turkey, as there is no regular financial flows between these two communities** if we exclude the restoration of religious buildings and infrastructure, mostly those originally built in the Ottoman empire, such as the Ferhadija mosque in Banja Luka¹⁴ and Aladža mosque in Foča¹⁵. **However, Islamic communities of Bosnia and Herzegovina and Turkey traditionally agree on most issues.** Diyanet (Directorate of Religious Affairs of Turkey) and TİKA (Turkish Cooperation and Coordination Agency) annually carry out several aid initiatives targeted at Muslims worldwide, although many of those are targeted specifically at the Balkans, the Caucasus and Central Asia. Through these initiatives, Turkey is having a visible impact (i.e. on the construction and restoration of mosques), but also a silent impact that will probably help Ankara gain supporters in BiH, possibly paving the way for Turkey's further penetration of the region.

The Gulf states' influence on Bosnia and Herzegovina through religious communities has changed in the last thirty years. It has been weakening constantly since the war in 1990s, (during which it raised significantly through different missionary activities implemented mostly by foreign fighters from Arab countries) at least in the official Islamic community of Bosnia and Herzegovina. Bosnian Islam is known as liberal and distinctly European, but since the war in 1990s, due to the influence of the Persian Gulf countries, some groups are advocating for Salafi Islam¹⁶, which is rejected by the majority of the Muslim population in Bosnia and Herzegovina¹⁷. **Those groups, as an unofficial part of the Islamic Community of BiH, are the target of influence of the Gulf states, mostly Saudi Arabia, Qatar and Kuwait.** Some of those groups have returned into the frame of the Islamic Community of BiH and some did not¹⁸. There is a substantial financial help to those groups by the Gulf states, mostly in terms of construction and reconstruction of mosques¹⁹, education of preachers from the said groups, etc.

2. Political influence – symbolic politics

Score: 6

Score	Empirical assessment
1	There were no significant gestures made by politicians of Russia, China, Turkey, the Gulf states towards the given country, or vice versa. No particular alignment between local parties' programs with the foreign policy interests of authoritarian countries.
2	
3	There have been a few of symbolic gestures made, receiving little media coverage, which had marginal impact on policy-making. Political parties' programs regarding authoritarian countries are not particularly assertive or aligning with their interests.
4	
5	Numerous gestures were made, receiving massive media coverage, which had considerable impact on policy-making. Certain party programs align with the interests of authoritarian states, but no financial support is suspected.
6	
7	Many and/or strong gestures on political level. Impactful meetings and public incidents were prevalent, heavily covered by media. Some local political parties clearly have an agenda aligning with the interests of authoritarian countries, or they are even financed by them.

First of all, it is important to understand that **Russia, Turkey and the Gulf states support and/or influence different groups in Bosnia and Herzegovina. Russia, for example, have supported the entity of Republic of Srpska, prioritizing the region over the country, mostly supporting anti-OHR** (OHR – Office of the High Representative which is an ad hoc international institution responsible for overseeing implementation of civilian aspects of the Peace Agreement ending the war in Bosnia and Herzegovina²⁰), **anti-NATO and other anti-Western issues**. Russia also supports the entity of Republic of Srpska in the Peace Implementation Council, mostly by refraining from voting for acts directed against the Republic of Srpska or Serb politicians²¹. Milorad Dodik, the president of the biggest Serb political party (the Alliance of Independent Social Democrats – SNSD) has been received by Vladimir Putin numerous times in Moscow.²² Visits to Bosnia and Herzegovina from the highest levels of Russian leadership are not prevalent at all, albeit the Russian foreign affairs minister visited Banja Luka once.²³ However, Dodik regularly meets the Russian ambassador for reporting and consulting on current issues.²⁴

China is the only state that can claim to be politically unbiased because they cooperate with all sides in Bosnia and Herzegovina. Even though China has an economic focus, they want to position themselves in a part of Europe, which is not still fully aligned with Brussels and they view Bosnia and Herzegovina as a puzzle piece in a larger geopolitical game. Their higher-ranking officials rarely visit Bosnia and Herzegovina, but symbolic political gestures are present. The latest example was during the coronavirus pandemic when China was among the first ones to send help to Bosnia and Herzegovina.²⁵ These gestures and cooperation resulted in an improved image of China in Bosnia and Herzegovina.

Turkey, as Russia, has influence only on one side in Bosnia and Herzegovina, namely Bosniaks in the Federation of BiH. Erdogan's political party has a special relation with the SDA, the largest Bosniak political party. The representatives of AKP regularly attend SDA's events and Erdogan openly supports the party.²⁶ Visits from Turkey on the highest level are frequent²⁷, as well as grand political gestures. Turkish political presence in Bosnia and Herzegovina is highly visible and intensive. Turkey, in exchange for its political, financial and any other support in BiH and, above all among Bosniaks, urges Bosniak ruling elites to follow certain demands of Turkey regarding the abolition of organizations considered to be affiliated with Fethullah Gülen, an ousted Turkish opposition figure and ideological opponent of President Erdogan- These requests come without giving any concrete evidence that these organizations are indeed affiliated with him and without any evidence that this Gülen organization is indeed engaged in terrorist activities²⁸.

The Gulf states have certain political presence but they are not too visible. There are some economic relations that have an impact on political relations but nothing major. As for the visits on the highest level, there are a few where the symbolic gestures are made. The latest example is Qatar's²⁹ and United Arab Emirates' donation of medical equipment -³⁰

3. Public opinion influencing

Score: 4

Score	Empirical assessment
1	No electoral events were accompanied by campaigns sponsored and/or backed by foreign authoritarian countries. No media portfolios or outlets are known for being owned by circles of foreign authoritarian powers. Authoritarian NGOs are not present, or if so, have no impact on the society. No fake news campaigns conducted to undermine pro-Western causes.
2	
3	Minimal possibility of influencing campaigns launched or backed by any authoritarian country. In the media space, marginal impact is reached by portfolios or outlets owned by circles related to the leadership of authoritarian countries, and their proportion of ownership is not significant on the media market. NGOs backed by these countries are present, but have marginal reach or impact on society. Although there are rare fake news campaigns they do exist, generally focusing on pro-Western causes, with marginal or negligible impact.
4	
5	Strong possibility of influencing campaigns backed by authoritarian countries. Significant part of the media portfolio is in the hands of circles close to the leadership of authoritarian countries, with considerable impact on the public opinion. NGOs backed by authoritarian regimes exert considerable influence on the public. There are considerable fake news campaigns launched to discredit pro-Western causes or stances.
6	
7	There have clearly been campaigns backed/sponsored by authoritarian countries. There have been significant acquisitions of media portfolios by circles tied to authoritarian countries. NGOs backed by foreign countries have strong influence on public opinion. Fake news campaigns conducted on large scales to discredit and undermine pro-Western causes and stances, with strong impact on the public opinion and discourse, or even setting the agenda.

There is no clear empirical evidence that Russia or Russian media sponsor fake news campaigns in Bosnia and Herzegovina to shape public opinion. Its influence is not easily proven because it is not transparent. **However, Russian news agencies like Sputnik are important sources of news – mostly on global affairs – for many media outlets from Serbia and Republic of Srpska.** There is lot of Serb-Russian organizations which have are active both in Serbia and Republic of Srpska.

China does not conduct any active information campaigns to influence public opinion in Bosnia and Herzegovina, or at least there is no proof they exist, but that does not mean there is no agenda or influence on public opinion. Xinhua News Agency has its branch in Bosnia and Herzegovina, which is one of China's state news agencies. There is also the Bosnian-Chinese Friendship Association, which has a news portal entitled Kina Danas,³¹ however, it is not very popular.

Turkey has its official news agencies' branches in Bosnia and Herzegovina with Anadolu Agency³² as the most important one. A lot of media in Bosnia and Herzegovina use Anadolu Agency as the source for news and information. There is a certain number of media that has financial support from Turkey, starting with STAV (internet portal and weekly newspaper)³³ and Faktor³⁴ (internet portal) and both of them are pro-SDA, especially STAV, which is aggressively defending SDA's political positions, discrediting its political opponents and it can sometimes spread hate speech. Thus, Turkish influence reflects on political relations in Bosnia and Herzegovina. However, their focus group is limited to only a part of Bosniaks – mostly sympathizers of SDA. There is also quite a few Bosnian-Turkish friendship NGOs.

The Gulf states – especially Qatar – promote their agendas in Bosnia and Herzegovina through Al Jazeera Balkans.³⁵ However, those agendas are different and often the opposite of what other outlets say on issues that are important to Qatar. Despite that, Al Jazeera Balkans is being generally seen as a trustworthy and unbiased news source. There are also numerous NGOs focusing on Salafi communities, which are mostly connected to the King Fahd Cultural Center ³⁶ financed by Saudi Arabia.

4. Economic and technological influence

Score: 5

Score	Empirical assessment
1	<p>No, according to available data and experts' assessment, authoritarian powers did not exploit their position when (re-)negotiating energy supply-related contracts. No major infrastructural investments backed by these countries, or if there are, they are considered advantageous to the recipient country according to the expert community. Also, no influence in the banking sector. There is no leverage on the Balkan country via tourism, or if there is, it is marginal or not exploited.</p> <p>There are no high priority investments. 5G installation is transparent with real competition. The country's position on Huawei is in line with the US's, and did not change during time.</p>
2	
3	<p>According to the assessments, the (re-)negotiation of the energy supply contracts was not quite advantageous to the recipient country, but it is still on the 'fair' side. A few major infrastructural projects were realized without scandals, they seem rather reasonable. They do not seem to be financed by particularly disadvantageous financial plans either. There is mild, or suspected influence in the banking sector, but it is very limited. There have been hints that leverage via tourism could be exploited, but not seriously, or it would have marginal effects on the given country.</p> <p>There are a few high priority investments, the 5G installation process is rather transparent, but with very limited or controlled competition. The country's leadership is rather hesitant, or changed its point of view regarding Huawei recently.</p>
4	
5	<p>There are numerous high priority investments. The 5G installation process is not quite transparent, and there is no real competition, authorities rather apply secretive steps, though it is still possible to access data on the process at least partially. The leadership is rather pro-Huawei, but does not seem to be entirely committed. There might have been a shift in position regarding this topic.</p>
6	

Score	Empirical assessment
7	<p>The authoritarian state clearly exploited its position in the (re-)negotiation of contracts. Large scale infrastructural investments, backed by an authoritarian state, have been very disadvantageous to the recipient country according to the expert community and/or hard data. There is a strong influence in the banking system. Also, the leverage on the country via tourism is huge, and is actively being used to blackmail and influence.</p> <p>There are many high priority investments of large volume. 5G installation is entirely non-transparent, total lack of competition, and a strongly secretive behavior is dominant on the authorities' side. No competition known, the leadership is openly pro-Huawei and there are large investments of the company in the country.</p>

Bosnia and Herzegovina is fully dependent on Russia's natural gas and oil, and there is no perspective of diversification of supply sources when it comes to energy, since Bosnia and Herzegovina is a minor market as a country. This dominant position in the energy sector in the region is important to Russia because of the associated political influence, which is reflected in the fact that already in 2013, Russia designated the Western Balkans as a region of strategic importance in its foreign policy strategy.³⁷ Every round of renegotiation of the conditions and prices with Russia, also taking into account the wartime debt which is a heavy burden of sorts, is done from an inferior position. Russia has also established a monopoly in the oil industry (namely in Republic of Srpska entity), putting Bosnia and Herzegovina in a bad position – all the investment and privatization of former state-owned companies has indebted the companies in question, which is larger than their capital, influencing the entire economic situation of the country heavily. An illustrative example is the "Brod" oil refinery which was acquired by JSC Zarubezhneft (Russian: Зарубежнефть) – a Russian state-controlled oil company based in Moscow that specializes in exploration, development and operation of oil and gas fields outside Russian territory (Cuba, Vietnam and Bosnia and Herzegovina). The refinery has not been operating since 2018³⁸ due to poor management. In the case of the privatization of the Brod Oil Refinery, conditions were not in the interest of BiH (or RS). After the privatization of the oil industry of the Republic of Srpska, the Optima Group was established. It is a limited liability company (d.o.o.) with a share capital of 50,000 KM and no obligation to audit financial statements. The future of Russia's privatization of the oil industry of the Republic of Srpska (Naftna industrija Republike Srpske – NIRS) is unclear, but one of the potential scenarios looming could greatly strengthen Russia's economic position in Bosnia and Herzegovina. Namely, as NIS (owned by Gazprom) bought a network of 22 OMV gas stations in BiH, and as the retail network of the Brod and Modriča refineries is their weak point in business terms, many consider Gazprom's takeover of the former oil industry of the Republic of Srpska as a logical, though unlikely, next move.³⁹ Also, there is an active promotion of non-ecological energy sources and there are no renewable energy projects that are being funded. As for the banking sector, Sberbank of Russia is present in Bosnia and Herzegovina and have some influence, as they are present in most of the part of the country.

Chinese investors have been stepping up their presence in the Balkans in recent years to get one step closer to the EU's Single Market. China also has additional reasons to expand its investment, credit lines and the economic presence in Europe in general. In addition to the diversification of the US dollar as a key factor in trade and gradual process of so-called de-dollarization, Beijing's efforts are focused on increasing the chances of Chinese corporations to access the market of the European Union, technology transfer and management skills, development of a distribution network suitable for Chinese exports, but also about political influence in this part of the world.⁴⁰ In previous years, China offered an EUR 10 billion investment fund to 17 countries in Central and Eastern Europe. **As part of the "Belt and Road" initiative, as much as EUR 100 billion are planned for the investment fund. Beijing is actively trying to acquire major infrastructural projects through investments.** So far, there were no major privatization ventures, but that is to change. The construction of the private thermal power plant Stanari near Doboj, in Republika Srpska, worth about EUR 550 million, which is owned by the company EFT, is the only project fully realized. The EFT Group has invested about 30 percent of its own funds, and the rest is a loan from the China Development Bank (CDB) of 350 million euros. Block 7 of the Tuzla Thermal Power Plant is still in the process of construction. The FBiH government and both houses of the Federation Parliament have voted that the entity will be the guarantor for a loan from the Export-Import Bank of China of about EUR 614 million for the construction of block 7 of the Tuzla Thermal Power Plant, with a total project value of EUR 722 million. The construction of Unit 7 should be completed by 2023 at the latest, when the existing units of TPP Tuzla would be shut down. The project was "opposed" by the European Union and the European Energy Community because they believe that the FBiH government should not be the guarantor of the loan and that it is a type of illegal state aid, contrary to European Union directives⁴¹. There is a lot of other planned projects and it remains to be seen what will happen. China, as Russia, invests in fossil energy sources in Bosnia and Herzegovina. As for the trade deficit of Bosnia and Herzegovina, China stands out, according to data of Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina (data for first three months of 2019).⁴² China and Chinese banks are continuing to invest in the Balkans in line with the EU-China 2020 Strategic Agenda for Cooperation. The latest example is a loan from the Export-Import Bank of China (Eximbank) worth EUR 614 million for the construction of block 7 of the Tuzla coal-fired power plant in Bosnia and Herzegovina.

Of the main trade partners, BiH has the largest coverage of imports by exports with Austria of 149%, Slovenia 117%, Croatia 81%, Germany 78%, Italy 64%, and with Serbia 63%. In addition to these countries, important trade partners of BiH are the United States, Russia and China. However, the coverage of imports by exports with these countries is small: with Russia it is 13%, with the USA it is 7.5%, and with China 2%.⁴³

These investments provide China with political and economic influence over the country. They are not at all transparent and we do not know their effect on Bosnia's labor market, financial markets, human rights situation, etc. Nor do we know whether these investments meet the EU's and Bosnia and Herzegovina's laws and standards.

Turkey is often mentioned in the context of economic influence but it is overestimated. Turkey mainly invests in the service industry and there are generally no large infrastructural projects of strategic importance for Bosnia and Herzegovina. Companies from Turkey have participated in the construction of certain highways,⁴⁴ but this is not about the type of loans as in the

case of China. The exemption is the Sarajevo-Belgrade highway which is a Turkish investment.⁴⁵ The influence in the banking sector is much smaller than that of Russia. The only Turkish bank present in Bosnia and Herzegovina is the state-owned Turkish Ziraat Bank. **Turkey is the fifth most important trade partner for Bosnia and Herzegovina by deficit.**⁴⁶ By overall turnout, it is one of the top 10 partners of BiH.⁴⁷

The Gulf states do not have that much influence in the economic sphere in Bosnia and Herzegovina. Their investments are mainly related to real estate and the service industry, but this is mostly the case in Sarajevo. In the banking sector, they are involved through Saudi-owned Bosnia Bank International.⁴⁸ Since 2010 BBI organizes the yearly Sarajevo Business Forum, opening up an opportunity for Arab investors.⁴⁹ They are also represented in tourism, but this is limited to a couple of months a year.

When it comes to technological impact, **there are some ideas of technological exchange with Russia, at least in the energy sector, but there is still nothing tangible.** Bosnia and Herzegovina only recently introduced 4G (last year) and it is still not present in the entire territory of the country – it is still being constructed. Two mobile operators - BH Telecom and M:Tel use Huawei 4G and 5G technology,⁵⁰ while HT Eronet uses Ericsson equipment, but the main reason of choosing Huawei is the cost of maintenance.

5. Educational influence

Score: 4

Score	Empirical assessment
1	No university partnerships or scientific agreements concluded.
2	
3	A few partnership and scientific agreements established, on an occasional basis, but with no significant financial support and/or small overall capacity. Also, the public does not know about it, it does not receive significant media attention.
4	
5	Certain university partnerships and scientific agreements are established, primarily long-term ones, with financial support from the authoritarian country, and/or of significant capacity. It receives decent attention from the media and is quite known by the public.
6	
7	Significant long-term university partnerships concluded, accompanied with strong financial support from an authoritarian country. Scientific agreements concluded, with large media attention.

Until two years ago, there was no educational cooperation between Russia and Bosnia and Herzegovina because Russia has only recently begun to promote its education systems at universities in Republic of Srpska. Also, at the University of Mostar, there were some guest lectures from Russia as well as a delegation from the Russian embassy who talked about the Russian scholarship programs and chances of studying in Russia.⁵¹ There is also official cooperation with the Faculty of Philosophy of the University of East Sarajevo, the Department of Russian Language and Literature and International Political Relations was formed in cooperation with the Moscow State Pedagogical University and the Russian University of the Society of Nations.⁵² Given the combination of terms in the name of the department, there is a desire to affirm cooperation between Russia and Republic of Srpska. There is still no longer-lasting cooperation, if we exclude the latter.

China shows great interest in educational cooperation. Visits of delegations with ideas on establishing cooperation are relatively frequent, but it is not easy, given that such decisions are made at the highest level in China. We can say that this is just the beginning of trying to make an impact. Several branches of the Confucius Institute have already been opened in Bosnia and Herzegovina, where the Chinese language is being taught.⁵³ In addition, in cooperation with the institute, a department of Chinese language was formed at the University of East Sarajevo, and all lecturers there are from China.

There are a significant number of agreements on cooperation between Turkish and Bosnian universities. We should not ignore the fact that there are two Turkish universities in Bosnia and Herzegovina (International University in Sarajevo – IUS⁵⁴ and International Burch University,⁵⁵ which was later on acquired by US Global Invest), as well as a number of Turkish schools. An example is the Maarif school network,⁵⁶ which belonged to the FETO movement.

The Gulf states mostly have influence in the field of Islamic studies, but indirectly. Some of the members of the Salafi movement study in the Gulf states, return to Bosnia and Herzegovina and work there as missionaries. They cannot become a part of Islamic Community structures after their return because they do not go abroad through the official channels of the Islamic Community of Bosnia and Herzegovina, and most of them did not start education through the public system in Bosnia and Herzegovina. The Gulf states do not try to establish interuniversity cooperation. There is only one bigger investment of Saudi Arabia worth mentioning: they will invest USD 17 million in the construction of the University Library in Sarajevo.⁵⁷

North Macedonia

Exposure, political attitudes and receptivity

North Macedonia gained its independence from Yugoslavia in 1991. While being the only country that managed to secede without an armed conflict, **North Macedonia's⁵⁸ independence was marked with significant challenges and major political disruptions.** In less than 30 years of independence, the country faced Greek trade embargo from February 1994 to October 1995 due to the name "Republic of Macedonia" and the country flag, conflict in neighboring Yugoslavia in 1999, small scale ethnic conflict in the northwestern part of the country in 2001, decades-long Greek veto on Euro-Atlantic integration, and several political crises. **In addition to corruption-prone governments hesitant to implement reforms, these developments made the independence of North Macedonia a struggling endeavor with political, social, and economic vulnerabilities that could be easily exploited by foreign actors with authoritarian tendencies.**

The current political system in North Macedonia is largely a result of the power-sharing agreement from 2001, which concluded the short ethnic conflict in 2001.⁵⁹ This model understands a consociational democracy where the political parties with most votes from the ethnic Macedonian and the ethnic Albanian "political blocks" usually form the government.⁶⁰ While society is relatively reconciled on an ethnic level with low involvement of religious authorities in daily politics, still there is a tendency of ethnically-driven political and social organization with low levels of trust and interaction between the ethnic communities. This setting often serves as a fertile ground for internal and external ill-intended actors that could exploit the situation to generate instability. The crowded and underpaid media sector with high levels of polarization and fake news proliferation⁶¹ coupled with low levels of media literacy⁶² could further facilitate potential efforts.

Despite ethnic fragmentation being an embedded part of the country's political system, the people of North Macedonia tend to care more about the economic outlook of the country and the widespread corruption and impunity.⁶³ While the economy of North Macedonia is relatively stable with a low level of inflation,⁶⁴ the high level of interconnectedness with the EU (82% of the exports) and especially Germany (27%) makes the economy dependent on the economic trends in the EU28.⁶⁵ While the Macedonian economy enjoyed a growth of 3-4% annually in 2018 and 2019,⁶⁶ this growth has uneven distribution in the society resulting in significant economic and social divisions. Similar to patterns seen regionally, this situation is further amplified considering the legacy from the privatization process in the 1990s that resulted with many people losing their jobs while at the same time oligarchs managed to obtain significant resources that still allow them to have a strong say in the economic and political life of the country. **This expanding division creates layers in the society that feel that the current political and economic model is to their disadvantage. Actors that could offer fast solutions to their economic problems while suggesting that the liberal democracy model showed incapable to meet their needs could easily manipulate these concerns.**

When it comes to energy, **while the overall country energy supply is relatively diversified with 58% import requirements, the country is still completely dependent on gas imports from Russia that come through Bulgaria through a single pipeline.** Natural gas accounts for 13,16%⁶⁷ of overall electricity production. Out of the total volume of imported gas, 73% is used for electricity production by the joint venture gas plant Te-To, which is owned by Cyprus-based company TKG,⁶⁸

while the rest is used for industry. Due to the undeveloped network⁶⁹ for final consumers, only 272 households use natural gas.⁷⁰

The Euro-Atlantic path of North Macedonia was embraced by all major political actors since the independence of the country in 1991. Despite the consensus, the process was an uphill battle with frequent motivation crises. The long-standing issue with Greece that blocked the then-Republic of Macedonia to integrate with the EU and NATO, exposed the country to increased influence from third countries. The Greek veto for North Macedonia in 2008 and the inability of the EU member states to reach a consensus on starting the accession negotiations despite the positive recommendations by the European Commission (EC) showed how inconsistent strategic decisions could undermine fragile democracies. It is widely believed that the 2008 Bucharest summit veto on NATO ignited the country's democratic downturn. This development created a power vacuum with traditional partners of North Macedonia like the EU and the US gradually losing their leverage over the country since they couldn't deliver on their promise of further integration. The government that led North Macedonia at the time quickly utilized the situation to alter its technocratic and reformist course into a populist semi-authoritarian regime over less than eight years. **From 2008 to 2016, this context provided an opportunity for third countries to try to provide an alternative geopolitical platform that for a short period started to seem like an alluring alternative for the political establishment even though the official position favoring full Euro-Atlantic was maintained. However, the situation started to shift following the protests and the change of the government, which later managed to resolve the naming dispute with Greece, resulting in the accession of North Macedonia to NATO in April 2020, and the opening of the accession negotiations with the EU.** ⁷¹

1. Churches in politics and public life: Religious soft power and material influence

Score: 4

Score	Empirical assessment
1	No financial or other known support through churches. Churches do not voice political views at all. Church connections do not exist, educational or staff mobility is not prevalent.
2	
3	Little financial support for churches from abroad, and only occasionally, it has marginal importance in the financial stance of the given local church. Churches very rarely voice opinions related to politics. Church connections do exist, but their impact is marginal, and reach only an insignificant number of clerics.
4	
5	Considerable and regular financial support from abroad to the church, however, the church does not strongly depend on it, it would be able to operate without these funds. The church and its representatives rather often voice political views, aligning with the interests of the given foreign country. Staff mobility is considerable, but does not have major impact on either the local church or public opinion.
6	
7	Local church depends financially on a church abroad, receives massive, regular financial support. It is very common for church staff to be sent abroad for education, and a considerable number of clerics from abroad are sent to the local church, having a visible impact. Church and church leaders have strong voice in the public discourse and regularly take stance in political issues and debates.

The two largest religions in North Macedonia are Eastern Orthodox Christianity and Islam⁷² with believers that respectively represent approximately 65% and 33% of the population. Ethnic and religious affiliation⁷³ and religious and political affiliation are largely divided along ethnic lines.⁷⁴ As a constitutionally secular country, the religious communities in North Macedonia are separated from the state and they enjoy equal treatment within the legal system. Despite the official secular character of the state, the religious communities play an important part in the social and cultural life as the citizens regard religion as an important aspect for them personally.⁷⁵

Most of the Orthodox Christians are affiliated with the Macedonian Orthodox Church – Ohrid Archbishopric (MOC-OA) – while most of the Muslims with the Islamic Religious Community in Macedonia (ICM).

This setting gives these two institutions significant power and resources to shape social and cultural relations. However, their role in society is relatively limited, and religious leaders tend to avoid discussing political and social issues publicly and avoid intervening in daily political life. An exception of this occurred with the change of the name of the country to North Macedonia when MOC-OA clergy protested the change while the religious leaders within the ICM supported it.⁷⁶ Despite having a rather low profile in the mainstream discourse, the soft power they could exercise, and the resources at their disposal are attractive to various domestic and international actors. That is mostly visible from two processes. The periods of internal power transition and the amount of investment in religious objects coming from abroad. While the MOC-OA currently enjoys a rather stable leadership structure, which is not the case within the ICM, where verbal clashes and internal power struggle⁷⁷ occur between different fractions allegedly connected to competing political parties,⁷⁸ especially during internal elections for muftis.⁷⁹ It should be noted that the ICM faces significant legitimacy challenges originating from its autocratic management and the conservative fractions that claim that ICM does not represent them.⁸⁰ The informal strength of the religious communities in North Macedonia was visible during the Covid-19 pandemic, when the authorities showed hesitation to prevent them from conducting religious rituals despite movement and gathering limitations.⁸¹

Both religious communities have established **relations with actors from abroad**. Traditionally, **the people from the diaspora are the biggest donors to religious objects in the country. The MOC-OA has closer connections mostly with the ethnic Macedonian diaspora in Western and Northern Europe, North America, and Australia. On the other hand, the ICM and the Islamic community in general have established connections with the mostly ethnic Albanian diaspora living in Western Europe and North America.** Thus, these communities are significant donors in building religious objects. However, besides these transfers, renovation, and building projects were financed from funds originating from Russia, Turkey, and the Gulf States.

Lately, **there are instances where Russian-style churches are built with financial aid from businesspersons with connections to Russia.** For example, the Russian businessperson Sergey Samsonenko financed a project for a Russian style church in Skopje.⁸² Also, six other similar religious objects were built in the last period in different places in the country.⁸³ Another opportunity for influence is the importance of the Russian Orthodox Church in the mediation of the five-decade dispute between the MOC-OA and the Serbian Orthodox Church.⁸⁴

When it comes to funding of mosques, **Turkey is a significant donor mostly for restoration projects for mosques that originate from the Ottoman period and most of them are regarded as cultural heritage.** The projects are mostly conducted through the Turkish Cooperation and Coordination Agency, and so far included the restoration of six mosques in different parts of the country.⁸⁵ However, these restoration projects of Ottoman-style mosques are a small part of the total number of built mosques that are connected to funding from abroad. While no official data exists, there are estimates of over 350 mosques built within the period 2004-2014,⁸⁶ many of them constructed without a building permits and in rural parts of the northwestern part of the country with funds from organizations allegedly coming from entities within the Gulf States.⁸⁷ The archi-

tectural style of these mosques is different compared to the traditional Ottoman style and the new mosques are similar to Arab style mosques. It is also reported that 700 mosques are out of the ICM's reach⁸⁸ and are run by imams that had their education in the Middle East⁸⁹ and imams with training from abroad which preach ideas "originating from Saudi Arabia."⁹⁰

Influence-seeking through religious means can be regarded as limited. Little financial support reaches churches from abroad, but it occurs occasionally. The religious establishments are not financially dependent on this support and it has marginal importance in their financial stance. The MOC-OA and the ICM very rarely voice opinions related to politics. Religious connections between countries do exist, but their impact is marginal, and reach only an insignificant number of clerics.

2. Political influence – symbolic politics

Score: 5

Score	Empirical assessment
1	There were no significant gestures made by politicians of Russia, China, Turkey, the Gulf states towards the given country, or vice versa. No particular alignment between local parties' programs with the foreign policy interests of authoritarian countries.
2	
3	There have been a few of symbolic gestures made, receiving little media coverage, which had marginal impact on policy-making. Political parties' programs regarding authoritarian countries are not particularly assertive or aligning with their interests.
4	
5	Numerous gestures were made, receiving massive media coverage, which had considerable impact on policy-making. Certain party programs align with the interests of authoritarian states, but no financial support is suspected.
6	
7	Many and/or strong gestures on political level. Impactful meetings and public incidents were prevalent, heavily covered by media. Some local political parties clearly have an agenda aligning with the interests of authoritarian countries, or they are even financed by them.

Bilateral relations between North Macedonia and Turkey were established in August 1992.⁹¹ Since then, important bilateral protocols were signed for cooperation in a variety of fields including defense, military training, security, intelligence, culture, tourism, sport, trade and economy, legal and customs cooperation.⁹² Turkey was an important supporter of North Macedonia in the process of joining the NATO alliance.⁹³ **The Turkish government has been a frequent donor to the army,** and provided a significant amount of development aid in different areas, including medical supplies during the Covid-19 pandemic.⁹⁴ In 2017,⁹⁵ North Macedonia was among the top 10 countries receiving Turkish aid with USD 13.2 million.⁹⁶ The "positive and friendly relationship between the countries" embedded in "traditional cooperation" and the aim for "increased economic exchange" is frequently reaffirmed during high-level bilateral meetings. **For the period 2015-2019,⁹⁷ a total of 23 visits occurred between high-level representatives from the presidential, ministerial, and parliamentary level.** A major meeting occurred in February 2018 in Ankara between former Prime Minister Zoran Zaev and President Erdogan in which they reiterated the existence of a friendly, positive relationship between the countries with an aim for increased economic cooperation and integration of North Macedonia in NATO.⁹⁸

Lately, two factors shaped the relationship between Turkey and North Macedonia. First, the importance of Turkey to ratify the NATO Accession Protocol for North Macedonia which Turkey did in July 2019. Second, the requirements from Turkey towards North Macedonia for legal proceedings (extradition) of 15 persons residing in North Macedonia that Turkey believes are affiliated to "FETO (Fetullahist Terrorist Organization),"⁹⁹ an organization led by Fethullah Gülen. This process remains the only potential obstacle in the bilateral relations since the government of North Macedonia cited international and domestic legal obligations that could prevent the fulfillment of the Turkish requirements.

Bilateral relations between the Russian Federation and North Macedonia were established in January 1994. From that point, a total of 20 cooperation agreements and memorandums were signed for extended cooperation and procedure unification in the fields of trade, economic cooperation, culture, education, science, investment protection, energy including gas, diplomatic cooperation, military-technical cooperation, and other areas.¹⁰⁰ **The relations between the two countries remained limited, with the Russian Federation being important for Macedonian diplomacy within the framework of the UN-mediated name dispute as one of the three permanent members of the UN Security Council that then recognized the Republic of Macedonia under its constitutional name.**

The rather distant stance of Russia towards North Macedonia started to alter in the first half of 2015. The shift occurred following the first wave of the proliferation of wiretapped materials in 2015, when the prime minister at the time, Nikola Gruevski accused the opposition leader Zaev of plotting a coup d'état by blackmailing him with materials provided from foreign intelligence services. This event provoked a statement from the Russian MFA in January 2015 in which they endorsed the position of the government and asked for a "thorough investigation of the incident" while referring to a Russian proposal for adoption of an OSCE document on "the impermissibility of unconstitutional coups."¹⁰¹ Following this encounter, as the anti-governmental protests in North Macedonia increased, so did the frequency of statements from the Russian Ministry of Foreign Affairs and the Russian embassy in the country. The statements condemned the protests while establishing a link between the actors on the ground and external actors.¹⁰² In June 2017, the new government in North Macedonia led by SDSM was established, which intensified the process of solving the name issue with Greece which led to the Prespa Agreement in June 2018. The agreement was followed by a nationwide referendum in September 2018. **The whole process of resolving the name issue deteriorated the official relations between Russia and North Macedonia.** Within this timeframe, Russia claimed that the final idea to change the country's name is to ensure and speed up Skopje's accession to NATO contrary to the will of the people."¹⁰³ In contrast, the government of North Macedonia condemned Russia for interfering in the internal affairs of the country and even expelled a Russian diplomat in March 2018.¹⁰⁴ Following the resolution of the name issue and the start of the NATO membership ratification process in 2019, North Macedonia tried to incrementally improve the official relationship with Russia mostly due to economic reasons.¹⁰⁵ **The preceding Russian recognition of the new name of the country¹⁰⁶ was an important gesture of de-escalation: the basic Russian intention was to prevent North Macedonia from entering NATO, now once that is done, it is expected that their activities will significantly decrease.¹⁰⁷**

In the period 2015-2019, nine high-level meetings occurred between the sides, most notably the meeting in Moscow in May 2017 between the former President of North Macedonia Gjorgje

Ivanov and Russian President Putin. The other meetings include diplomatic exchanges on ministerial and ambassador levels mostly on the margins of international events, including the meeting between the incumbent President Stevo Pendarovski and Russian FM Sergei Lavrov in November 2019 on the margins of the Paris Peace Forum. Within these meetings, the sides called upon increased economic cooperation and trade.

The Political party “United Macedonia” (Edinstvena Makedonija), the Democratic Party of the Serbs (DPS) and the Left party are the only political parties with a program or narrative that promotes a closer relationship with Russia or China and a geopolitical shift of the country.¹⁰⁸ While the DPS advocates for a closer relationship with Russia in wider terms, the United Macedonia party explicitly focuses on abandoning the current strategic objectives of the country as a NATO member state and focusing on Russia and membership in the Eurasian Union. For these parties, “the relationship with Russia is often just a chance to profile themselves locally and try to leverage their importance in domestic politics. They are opportunistic actors and could change their course towards China very quickly.”¹⁰⁹ The current rating of these political parties remains marginal.¹¹⁰ A political party with a slightly higher popularity is the Left party which, alongside other foreign policy objectives, promotes a strategic partnership with China and advocates for the country to leave NATO.¹¹¹ In the Parliamentary elections in July 2020, this party won two seats in the Parliament and currently is the only party with alternative foreign policy objectives.¹¹²

The bilateral relations between the People’s Republic of China and North Macedonia were established in October 1993 and **were temporarily suspended in the period 1999-2001 following the North Macedonia recognition of Taiwan in January 1999.** The recognition of Taiwan provoked a veto of China in the UN Security Council on the renewal of the United Nations Preventive Deployment Force in the country, a mission that had the mandate to secure the country’s border areas which could undermine the country security and threaten its territory.¹¹³ This move had significantly eroded the country’s already sensitive security situation considering the developments in Kosovo in 1999. In 2001, North Macedonia withdrew the recognition of Taiwan after which the two countries normalized their diplomatic relations.¹¹⁴ The countries have signed protocols and agreements on cooperation in the fields of trade and economy, foreign affairs, culture, investment protection, avoidance of double taxation, and fiscal evasion.¹¹⁵ In the period 2015-2019, nine high-level meetings occurred. including a meeting between the Prime Minister of China Li Keqiang, and former Prime Minister Nikola Gruevski in 2015, former Prime Minister Emil Dimitriev in 2016, and three meetings with the former Prime Minister Zoran Zaev in 2017, 2018 and 2019. During the last meeting with Zaev, Li Keqiang stated that China is ready to “dovetail the Belt and Road Initiative with North Macedonia’s development strategy” with highways as landmarks of the bilateral cooperation. The former PM Zaev stated that North Macedonia benefited from the China-Central and Eastern European Countries (CEEC) cooperation and “stands ready to work with the Chinese side to deepen cooperation in trade, investment, energy, agriculture, and infrastructure, to push bilateral relations for greater development.”¹¹⁶ **Interestingly enough, China managed to attract visibility and admiration for its actions in the region during the Covid-19 pandemic. “Russia did not receive the usual platitudes as they usually get.”¹¹⁷ China donated protective equipment¹¹⁸ and the Chinese Embassy donated funds to the Ministry of Health.** ¹¹⁹ A potential factor that could complicate the Chinese involvement in the country is the Chinese historical and current support for Serbia and their position towards the Kosovo issue an issue that significantly shapes

the perceptions of the Albanian minority in the county and is a determining factor whether they will perceive China as a foe or an ally¹²⁰.

North Macedonia has established bilateral relations with all of the relevant Gulf States – Saudi Arabia, Qatar and the United Arab Emirates. While standard bilateral protocols are signed with all the countries, there are additional protocols signed with Qatar for cooperation in foreign affairs, culture, exchange of information between media agencies, including a letter of intent for security cooperation. ¹²¹

However, the political and symbolic relations between North Macedonia and the Gulf states are quite limited and to a large extent focused on investment possibilities in North Macedonia. The government led by VMRO-DPMNE was rather active in conducting meetings with high-level representatives from the Gulf States. This activity resulted in the Emir of Qatar Hamad bin Khalifa Al Thani visiting the country in 2011, a visit which was followed by the signing of bilateral agreements in the fields of culture, education, health, and economy.¹²² Former Prime Minister Gruevski then conducted three visits to the Gulf States, a visit to Qatar in 2012,¹²³ Saudi Arabia in 2014,¹²⁴ and the United Arab Emirates in 2015.¹²⁵ In August 2017, the State Minister for Foreign Affairs of Qatar Soltan bin Saad Al-Muraikhi visited Skopje, where he met with President Ivanov and the Deputy MFA Tochi, focusing on economic cooperation and tensions in the Gulf.¹²⁶ In May 2020, the state of Qatar through the Qatar Fund for Development donated eight tons of protective equipment for managing the Covid-19 crisis, while pointing out that “the country could always count on aid and support from the state of Qatar.” ¹²⁷

Influence-seeking through political influence and symbolic politics could be regarded as moderate. Depending on the country, the number of gestures made differs with little to medium media coverage and marginal impact on policy-making. With an exception of one marginal political party that advocates for changing course towards Russia, no particular alignment between local parties’ programs with foreign policy interests of authoritarian countries are present. There is a consensus among the consulted experts that while Russian influence is expected to decrease, the period to follow will see increased Chinese influence in the region.

3. Public opinion influencing

Score: 4

Score	Empirical assessment
1	No electoral events were accompanied by campaigns sponsored and/or backed by foreign authoritarian countries. No media portfolios or outlets are known for being owned by circles of foreign authoritarian powers. Authoritarian NGOs are not present, or if so, have no impact on the society. No fake news campaigns conducted to undermine pro-Western causes.
2	
3	Minimal possibility of influencing campaigns launched or backed by any authoritarian country. In the media space, marginal impact is reached by portfolios or outlets owned by circles related to the leadership of authoritarian countries, and their proportion of ownership is not significant on the media market. NGOs backed by these countries are present, but have marginal reach or impact on society. Although there are rare fake news campaigns they do exist, generally focusing on pro-Western causes, with marginal or negligible impact.
4	
5	Strong possibility of influencing campaigns backed by authoritarian countries. Significant part of the media portfolio is in the hands of circles close to the leadership of authoritarian countries, with considerable impact on the public opinion. NGOs backed by authoritarian regimes exert considerable influence on the public. There are considerable fake news campaigns launched to discredit pro-Western causes or stances.
6	
7	There have clearly been campaigns backed/sponsored by authoritarian countries. There have been significant acquisitions of media portfolios by circles tied to authoritarian countries. NGOs backed by foreign countries have strong influence on public opinion. Fake news campaigns conducted on large scales to discredit and undermine pro-Western causes and stances, with strong impact on the public opinion and discourse, or even setting the agenda.

Influencing public opinion has remained an important influencing tool. The most important event in this regard in North Macedonia and even in the region was the name change referendum in September 2018. As resolving the name issue with Greece and the following referendum was regarded as an important geopolitical event which could effectively unblock the country's Euro-Atlantic integration, it attracted significant efforts to influence public opinion, which escalated in the months before the referendum. **Being a polarizing event with significant political stakes, diverse efforts to influence public opinion through official and unofficial channels were recorded. On one hand, there was a campaign conducted by the government focusing on the benefits of the process. On the other hand, there was a communication campaign run by local political parties that were opposing the name change and called for boycotting the referendum as the only viable way to stop the process.** The boycott movement did not function as a single organism with a clear goal but rather included different nuances dispersed across various efforts run by different political and civic actors in the physical and online sphere. For example, the largest opposition party VMRO-DPMNE took an ambiguous official stance¹²⁸ but most of their voters boycotted the referendum. Some smaller political parties like United Macedonia and Voice for Macedonia (Glas za Makedonija) were actively against the referendum, leading guerrilla campaigns¹²⁹ against it in addition to many informal civic groups. Finally, there was the boycott campaign in the online information space, which was to large extent amplified through organized efforts including the use of automated bots on Twitter¹³⁰ and artificially amplified presence on social media¹³¹ for the promotion of the #boycott hashtag. **While there is no official evidence of Russian engagement in this regard, different reports¹³² and official investigations¹³³ pointed to that direction.** In addition to the referendum as a major event, disinformation activities are a continuous and integral part of the Macedonian online information space, including during the Covid-19 crisis.¹³⁴

The media landscape in the country is quite limited, consisting of 5 daily and 5 weekly newspapers, 53 TV broadcasters, one public broadcaster with 5 channels, 71 radio stations, and approximately 80 internet news portals.¹³⁵ TV stations in North Macedonia are mostly owned by Macedonia-based businesspersons with no official links to entities in these countries. One outlier is the Alfa TV¹³⁶ which in 2012 was bought by Serbia based CHS group¹³⁷ which then resulted in significant turn from a pro-opposition to a pro-government editorial policy.¹³⁸ In 2018, reports linked the ownership of the TV Alfa and seven other right-wing news portals with Hungarian nationals, former executives of Magyar Televízió.¹³⁹

An important feature of the Macedonian information space is **its large exposure to information from regional news outlets due to language similarities.** Therefore, investments in the media information space occur in larger countries like Serbia and Bosnia and Herzegovina, which then include content relevant for North Macedonia. One such example is the Sputnik portal and tabloids that operate in Serbia but frequently inform on developments in North Macedonia. "The role of Belgrade in this regard is of particular importance since the control of these portals does not come from Moscow, it comes from Belgrade. The censorship mechanisms of Vucic in Serbia are way stronger compared to any Moscow-controlled narrative".¹⁴⁰ Portals and media outlets in North Macedonia often cite this content and contribute in expanding the narrative locally.¹⁴¹ Moreover, considering the overall situation in the media in the Western Balkans, "for the impoverished Serbian outlets is way easier to take over free content from Sputnik rather than purchasing it from somewhere else."¹⁴² Turkish media engagement is quite limited in this regard, with the Anadolu Agency and the TRT in the Macedonian language being the only portals that actively

report on developments in Turkey. **Another regional outlet is the Qatari television Al Jazeera Balkans** that operates in Bosnia and Herzegovina with a local office in North Macedonia.

Compared to the overall country size, North Macedonia has **a rather developed civil society with most of the civil society organizations promoting narratives in line with the strategic objectives of the country.**¹⁴³

The overall footprint of these countries in local civil society is minimal to limited, except for Turkey. The civil society organizations with connections with Turkey are more active, which to a large extent can be explained due to the Turkish national minority in the country. Most of them are organized in the Association of Turkish non-governmental organizations (MATUSITEB), which has 55 member organizations. While most of the organizations work on religious, cultural, and educational issues,¹⁴⁴ there are instances in which they do comment on political developments such as the appointment of the Kosovan ambassador to the Republic of North Macedonia.¹⁴⁵ The activities of these organizations are frequently funded by the Turkish Cooperation and Coordination Agency – TIKKA.¹⁴⁶ **The Russian footprint within civil society is marginal mostly with cultural organizations that keep a low profile and are not present in the media.** While the reports¹⁴⁷ claim that there are approximately 30 organizations for Russian-Macedonian friendship mostly funded by the Embassy of the Russian Federation in Skopje, they do not take an active part in the public discourse.¹⁴⁸

Influencing public opinion to a large extent revolves around the infrastructure that promotes narratives in line with the Russian official positions and limited civil society activity with vague inclination to Turkish official positions. The activities of Turkish organizations are relatively rare and endorsed by governmental representatives. The other countries especially China do not have significant outlets that aim to promote their positions. In the media space, marginal impact is reached by portfolios or outlets owned by circles related to the leadership of authoritarian countries, and the rate of ownership is not significant in the media market. NGOs backed by these countries are present but have marginal reach or impact on society. There are considerable fake news campaigns launched to discredit pro-Western causes or stances.

4. Economic and technological influence

Score: 4

Score	Empirical assessment
1	<p>No, according to available data and experts' assessment, authoritarian powers did not exploit their position when (re-)negotiating energy supply-related contracts. No major infrastructural investments backed by these countries, or if there are, they are considered advantageous to the recipient country according to the expert community. Also, no influence in the banking sector. There is no leverage on the Balkan country via tourism, or if there is, it is marginal or not exploited.</p> <p>There are no high priority investments. 5G installation is transparent with real competition. The country's position on Huawei is in line with the US's, and did not change during time.</p>
2	
3	<p>According to the assessments, the (re-)negotiation of the energy supply contracts was not quite advantageous to the recipient country, but it is still on the 'fair' side. A few major infrastructural projects were realized without scandals, they seem rather reasonable. They do not seem to be financed by particularly disadvantageous financial plans either. There is mild, or suspected influence in the banking sector, but it is very limited. There have been hints that leverage via tourism could be exploited, but not seriously, or it would have marginal effects on the given country.</p> <p>There are a few high priority investments, the 5G installation process is rather transparent, but with very limited or controlled competition. The country's leadership is rather hesitant, or changed its point of view regarding Huawei recently.</p>
4	
5	<p>There are numerous high priority investments. The 5G installation process is not quite transparent, and there is no real competition, authorities rather apply secretive steps, though it is still possible to access data on the process at least partially. The leadership is rather pro-Huawei, but does not seem to be entirely committed. There might have been a shift in position regarding this topic.</p>
6	

Score	Empirical assessment
7	<p>The authoritarian state clearly exploited its position in the (re-)negotiation of contracts. Large scale infrastructural investments, backed by an authoritarian state, have been very disadvantageous to the recipient country according to the expert community and/or hard data. There is a strong influence in the banking system. Also, the leverage on the country via tourism is huge, and is actively being used to blackmail and influence.</p> <p>There are many high priority investments of large volume. 5G installation is entirely non-transparent, total lack of competition, and a strongly secretive behavior is dominant on the authorities' side. No competition known, the leadership is openly pro-Huawei and there are large investments of the company in the country.</p>

The economy of North Macedonia is relatively stable with low levels of inflation.¹⁴⁹ In the last two years before the Covid-19 crisis, the country enjoyed an annual GDP growth of 3-4% with forecasted 3.5% growth for 2020. Being a small country with a developing economy and relatively low purchasing power¹⁵⁰ North Macedonia has limited capacity to attract investments compared to larger regional economies like Greece, Bulgaria, and Serbia.

Despite these limitations, there were **instances when companies from Russia and China, and to some extent, Turkey engaged in the country in major projects ranging from energy to transportation.**

The most significant projects in this regard are the connection of North Macedonia to the **South Stream pipeline and the Chinese loans and involvement in the construction of two major highways in the country.**

The country with the highest volume of trade with North Macedonia is Germany with over EUR 3 billion in 2018. China is ranked 7th (→ EUR636 million) and Turkey is in 8th place (EUR 482.2¹⁵¹ million). The volume of trade with Russia is EUR 173.8 million, followed by Qatar with EUR 13 million, Saudi Arabia with EUR 9.6 million, and the United Arab Emirates with EUR 3.4 million.¹⁵²

The countries with the biggest direct investment in North Macedonia are the United Kingdom with EUR 739.6 million and Austria with EUR 687.1 million. From the countries of interest, Turkey is the biggest investor in the country with total investments of EUR 283.9 million in 2018 (5.34% of the total volume of investments), followed by China (EUR 132.6 million), Russia (19,3), the United Arab Emirates (17.1), and Saudi Arabia with EUR 480 thousand. No investments were registered from Qatar in 2018.¹⁵³

The involvement of Russia in the energy sector of North Macedonia is to the largest extent through the distribution of natural gas. The natural gas supply of North Macedonia is not diversified since the whole supply goes only through one pipeline from Russia to Bulgaria built in 1997. In 2013, the government of the Republic of Macedonia and the Russian Federation signed an

agreement for involvement in the South Stream pipeline and allowed Gazprom to remain the sole operator of the pipeline. In its annual report in 2014, the European Commission stated that the Intergovernmental agreement is not compatible with the *acquis*.¹⁵⁴ Despite the failure of the South Stream project, the agreement was heavily criticized at the time. The Energy Community¹⁵⁵ raised concerns about Macedonian involvement in the South Stream gas project. The head of the Energy Community stated that the project is “not in compliance with the Energy Community agreements, which are part of the European Union’s common regulations; i.e., the *acquis*,” and that the deal is problematic since it allowed Gazprom a monopoly in Macedonia which has to be re-negotiated as the country integrates into the European Union.¹⁵⁶ Another problem with this agreement was its lack of transparency: “The deal with Gazprom was signed behind closed doors, did not involve consultations with relevant stakeholders, and was never made publicly available. The whole procedure lacked transparency and it turned out to be costly for Macedonia.”¹⁵⁷ The monopoly of supply paired with the limited infrastructure costs North Macedonia considerably. In 2015, the price was USD 564 for 1000 cubic meters for the natural gas imported from Russia, which is higher compared to its neighbors like Serbia (457 USD) and Bulgaria 501 (USD).¹⁵⁸ **Despite the efforts to diversify energy supply,¹⁵⁹ such as the plans for interconnection for the transmission of natural gas with Greece,¹⁶⁰ North Macedonia will remain completely dependent on Russia in the short-term,** especially since the natural gas demand is expected to increase due to investments in secondary gasification.¹⁶¹

The start of the construction of two major highways in North Macedonia marked a new level of Chinese engagement in the country. Presented as crucial infrastructural projects with significant economic benefits, the government in 2012 announced that the projects will be financed via a loan from the Export-Import Bank of China. In December 2013, the government signed an agreement for the construction of two highways worth total amount of EUR 579 million. After awarding the contract to the Chinese Sinohydro Corporation in 2015, the SDSM, then in opposition, released wiretapped materials based on which they accused the prime minister and the minister of transport of discussing commissions for awarding the contract.¹⁶² This project fits in a pattern of Chinese-funded infrastructural projects where the contract envisions Chinese courts as arbitration bodies,¹⁶³ which illustrates the asymmetry in the negotiations and leaves North Macedonia vulnerable to defend its interest via legal means if such a need arises. In 2018, the government led by SDSM announced a new loan of EUR 180 million from the Exim bank for compensating increased costs due to the poor planning of one of the highways.¹⁶⁴ The overall procurement procedure and the implementation of the projects by Chinese contractors without a bidding process created precedents in the legal procurement process and has negative effects on the region’s convergence with EU norms.¹⁶⁵

Influence-seeking by these countries through the banking system is limited. Out of 15 banks, currently, there is one Turkish state-owned bank Halkbank present on the Macedonian market,¹⁶⁶ which entered it in 2011. In 2012, this bank merged with another state-owned Turkish bank Ziraat¹⁶⁷. In a rather unusual move for a bank, the Halkbank launched an initiative to replacing the signs of the Yahya Kemal College Skopje, a school that Turkish government associates with FETO and replaced that with the signs of Turkey’s Maarif Foundation.¹⁶⁸ A major part of the Turkish economic footprint is the investment in the Skopje and Ohrid international airports in 2010 by the Istanbul based TAV Holding. The TAV Holding obtained a 20-year concession with an obligation to invest EUR 200 million in both airports.¹⁶⁹ Other major Turkish investments include two large-scale

mixed-use building complexes in Skopje, Cevahir Sky City (EUR 100 million investment), and the Li-mak Diamond Complex (EUR 250 million investment).¹⁷⁰ Other cases include small- to medium-size investments in various industries.¹⁷¹

With a significant share of almost 15% of the total amount of 757.593 visits annually, Turkish tourists are important for the Macedonian tourism sector compared to the marginal effect of tourists coming from the Russian Federation, who amount to less than 1% of visitors.¹⁷² While there is cooperation on the level of chambers of commerce, no indications exist of leveraging the number of tourists for political purposes, especially considering the reciprocity in the process.¹⁷³

Russian, Chinese, and Turkish government-owned or private entities engaged in investment in the country. The Gulf States were not involved in comparatively significant investments. When occurred, the negotiation of contracts was rather disadvantageous to the country and were surrounded by a lack of transparency and economic and political consequences. The need for these infrastructural projects is questionable, and it seems financially risky. The influence in the banking sector is limited to incidental involvement. The leverage via tourism is non-existent or it is marginal at best due to reciprocity in tourist visits.

The installation of the 5G network in the country is administrated by the Ministry of Information Society and Administration with the Agency of Electronic Communication as a regulatory body. The 5G network in North Macedonia is installed by the Macedonian Telekom, which as part of the Magyar Telekom, a subsidiary of Deutsche Telekom, **collaborates with Huawei in the 5G installation process** which currently is in its testing phase.¹⁷⁴ This process was not questioned publicly until December 2019, when the government announced that it will utilize its position as a regulator and minority shareholder in Macedonian Telekom to address **the concerns of possible security risks raised by the NATO partners due to the installation of the 5G network.**¹⁷⁵ There is only one high priority investment, which is the 5G installation process. The process is rather transparent, but with the very limited or controlled competition due to the ownership structure of Macedonian Telekom. The country's leadership wants to ensure the installation of the network continues building on the already visible efforts and achieved progress, but has reservations due to security concerns and expectations within NATO.

Despite the current limitation, **there is potential for further Chinese involvement in building up technological infrastructure in the region,** with case in point being the installation of 1000 face recognition cameras in Serbia, a project that could seem alluring to other governments and be replicated anywhere in the region.¹⁷⁶

5. Educational influence

Score: 3

Score	Empirical assessment
1	No university partnerships or scientific agreements concluded.
2	
3	A few partnership and scientific agreements established, on an occasional basis, but with no significant financial support and/or small overall capacity. Also, the public does not know about it, it does not receive significant media attention.
4	
5	Certain university partnerships and scientific agreements are established, primarily long-term ones, with financial support from the authoritarian country, and/or of significant capacity. It receives decent attention from the media and is quite known by the public.
6	
7	Significant long-term university partnerships concluded, accompanied with strong financial support from an authoritarian country. Scientific agreements concluded, with large media attention.

Having a diverse population in terms of ethnicity, culture, religion, and language affiliation, North Macedonia is a **complex and challenging environment** in the educational sphere.

The Turkish educational footprint by far exceeds the other countries of interest. To a large extent that is the case due to the Turkish minority in the country and the historical relations between the countries, including the institutional heritage and cultural and physical proximity of the countries compared to China and Russia. One of the biggest Turkish educational institutions is the Maarif International School run by the Turkish Maarif Foundation (TMF), which was established by the Turkish Parliament in June 2016. The Maarif Foundation was established to assume the administration of overseas schools linked to FETO.¹⁷⁷ In North Macedonia, there are five educational institutions run by the TMF including a kindergarten.¹⁷⁸ Another major educational institution is the International Balkan University with campuses in Skopje and Istanbul. The university was established in 2006 by a private foundation and has an annual enrolment of approximately 1000 students.¹⁷⁹ One of the honorary members of the board of trustees of the university is the current speaker of the Grand National Assembly of Turkey.¹⁸⁰ Another important institution active in North Macedonia is the Yunus Emre Institute in Skopje, which is a public foundation aimed to promote Turkey, the Turkish language, and culture.¹⁸¹ In addition to these institutions, Turkey and the TIKA are frequent donors in school renovation projects.¹⁸²

Compared to Turkey, other countries have limited to nonexistent influence in education.

The central part of the Chinese efforts is the Confucius Institute formed in 2004, which runs within the Ss. Cyril and Methodius University of Skopje. The institute offers courses in Chinese language, and information and consultation services regarding China,¹⁸³ with current estimates stating that over 200 people study Chinese annually.¹⁸⁴ In 2019, the Institute established a memorandum for cooperation with the Faculty for Electrical Engineering and Information Technology within the Ss. Cyril and Methodius University of Skopje with an aim to increase educational cultural and scientific cooperation.¹⁸⁵ Beyond the work of the Confucius Institute, every year the Chinese government offers scholarship programs for bachelor, master, PhD studies and specializations for 5 to 10 students to study in China.¹⁸⁶

The Russian efforts in this regard are limited with activities mostly done in collaboration between the Russian embassy in Skopje and the Ss. Cyril and Methodius University of Skopje. The Russian center within the university was opened in 2016. The activities are rather rare and usually involve marking important historical days, cinema projections, and concerts. Once per year, the Macedonian citizens are eligible to apply for 40 Russian government scholarships to study in universities in Russia.¹⁸⁷

The educational influence is limited to just a few partnership and scientific agreements, that occur on an occasional basis, but with no significant financial support and/or small overall/ capacity except for Turkey. The public is not informed about it, and the activities do not receive significant media attention.

Montenegro

Exposure, political attitudes and receptivity

Montenegro has 620,029 inhabitants according to the latest Census of Population results from 2011. It is a multiethnic state, where 44.98% of inhabitants declared themselves Montenegrins, 28.73 % are self-declared Serbs, 8.65% Bosnians, 4.97% Albanians, 3.31% Muslims and 0.97% Croatian.¹⁸⁸ A recent poll shows that Montenegrins and Serbs distance themselves from each other to a very small extent, and **divisions are only noticeable in the political sphere.**¹⁸⁹ Ethnicity and religion are much related in Montenegro. The vast majority of population are Orthodox Christians (72.07%),¹⁹⁰ divided between two opposed churches – the Serbian Orthodox Church (SOC) and Montenegrin Orthodox Church (MOC). The SOC is a dominant church and a very influential opinion-leader in the country, which undermines some of the core democratic values.¹⁹¹ According to another recent poll, citizens have the highest confidence in the SOC (46.4%) after the education system.¹⁹² About a fifth of Montenegrin population are Muslims (19.41%) and 3.44% are Catholics. The remaining 5.4% of the population belong to other religious groups, are atheists/agnostics or do not declare their religious affiliation.¹⁹³

Montenegro **has implemented a number of reforms on its European and Euro-Atlantic path; however, it is still characterized by weak rule of law and widespread corruption.** Both economic and political fragilities made country more exposed to foreign influences. There are few actors who openly scrutinize the risks of collaboration with less democratic states, which is commonly nuanced through foreign investment arrangements. Collaboration features are not driven by a formation of oligarchic groups. However, Montenegro has experience in that type of cooperation. Different figures recognize Montenegro as an attractive and affordable destination. Last year, an economic citizenship award program was introduced, aimed at investors who are willing to invest in the country. However, even before that, citizenship was granted to wealthy and controversial figures.

Foreign investments are key economic growth-generators of the country. **There is no particular country dominating investments, and the most significant ones have come from Italy, Russia, Serbia, and Cyprus, with new interest coming from the United Arab Emirates, Azerbaijan, China, and the United States.**¹⁹⁴ In addition, a significant part of the investment flows in Montenegro comes from countries and territories that have been designated as offshore financial centers.

Foreign investors in Montenegro enjoy national treatment, and the only limitation is that special permission is necessary for production and trade in arms and military equipment.¹⁹⁵ There are no limits either on foreign control and right to private ownership or in establishing companies in Montenegro, and there are no institutional barriers against foreign investors and screening mechanism for inbound foreign investment.¹⁹⁶

There is no publicly available information that may clearly indicate the direct impact of foreign countries on decision-making. Montenegro has historically and culturally developed friendly relations with Russia, but in last ten years these relations have been significantly affected by the course of the country's foreign policy direction. Since the 2006 referendum on independence, the then-ruling Democratic Party of Socialists (DPS) promoted **a pro-Western foreign policy, including both EU and NATO membership.** Post-factum analyses show that Russia has not been opposing Montenegro in achieving state independence in 2006, it was rather support-

ive to it through huge economic investments, but also through political contacts. Nevertheless, as in upcoming years political ties with Russia have been deteriorating, this country managed to find new Montenegrin political partners. The leading opposition party, Democratic Front (DF), is considered to be pro-Russian, which determines their political approach to various country's processes. DF's street protests from 2015 and the conviction of two DF party leaders for attempted terrorism and creating a criminal organization on the Election Day in 2016 ("Coup d'état affair") were accompanied by the suspicions and claims of Russian financial support or other involvement with the ultimate intention of preventing Montenegro from joining NATO.

China became a very important economic partner of the country following the construction of the largest infrastructure project in Montenegro – the Bar-Boljare Highway. This project raised public suspicions of coupling corruption with negotiations with Chinese partners. It involves the Chinese CRBC company, blacklisted by the World Bank for bribery and corruption, on one side¹⁹⁷ and companies and individuals close to the ruling party on the other.

The Bosniak party, which was in the ruling coalition with the DPS and other parties, publicly pointed out that it has friendly relations and excellent cooperation with the Justice and Development Party in Turkey (AK party).¹⁹⁸ However there are no records that Turkey is directly influencing its operations and functioning.

When it comes to the situation in media, **there is a media vulnerability to foreign propaganda**, which is usually comprised in informative media pieces, regardless of the editorial policy of the particular media.¹⁹⁹ The main issues that affect professional media coverage are strong polarization in the media community, with the pro-government and pro-opposition media, lack of self-regulation and economic insecurity. Opinion polls show that the largest percentage of respondents believe that the media is not independent/objective. Just over half of citizens (51.0%) believe that political parties have full influence over editorial policy, while 40.5% think that economic centers of power have complete influence over the editorial policy of media in Montenegro.²⁰⁰

1. Churches in politics and public life: Religious soft power and material influence

Score: 6

Score	Empirical assessment
1	No financial or other known support through churches. Churches do not voice political views at all. Church connections do not exist, educational or staff mobility is not prevalent.
2	
3	Little financial support for churches from abroad, and only occasionally, it has marginal importance in the financial stance of the given local church. Churches very rarely voice opinions related to politics. Church connections do exist, but their impact is marginal, and reach only an insignificant number of clerics.
4	
5	Considerable and regular financial support from abroad to the church, however, the church does not strongly depend on it, it would be able to operate without these funds. The church and its representatives rather often voice political views, aligning with the interests of the given foreign country. Staff mobility is considerable, but does not have major impact on either the local church or public opinion.
6	
7	Local church depends financially on a church abroad, receives massive, regular financial support. It is very common for church staff to be sent abroad for education, and a considerable number of clerics from abroad are sent to the local church, having a visible impact. Church and church leaders have strong voice in the public discourse and regularly take stance in political issues and debates.

The Serbian Orthodox Church (SOC) is a very influential opinion-leader and a financially powerful organization with almost all the Orthodox monasteries, churches and estates under its jurisdiction. Following traditional ties with Russia, Orthodox culture in their vision is one of the basic postaments for determining the national and cultural identification of Montenegro.²⁰¹ Through the SOC, Russia manages to maintain its impact via adherence to Orthodoxy in the country. Russian financial support to the SOC can often be traced back to Russian ultra-nationalist oligarchs with close political and financial ties to the Kremlin.²⁰²

After the turn of the Montenegrin authorities to the West, the SOC held Russia's position in the country, opposing pro-Western official politics. The SOC has been engaged in the promotion of Russian interests in Montenegro through its available resources – from its official newsletter, portals, social media profiles, and radios to spiritual centers, restaurants and hotels, as well as televisions, parties and organizations that support its ideology.²⁰³

The SOC condemned various governmental actions from the recognition of Kosovo's independence, the imposition of sanctions against Russia to the NATO accession process, presenting it as betrayal of Russia and Orthodoxy.²⁰⁴ As one of the loudest promoters of anti-NATO ideology in the country, the SOC together with other actors defined the concept of betrayal in terms of Montenegro's turning back on the centuries-old tradition of good relations with Russia and the suppression of Orthodoxy and traditional Montenegrin customs.²⁰⁵ Although SOC representatives were not implicated in the "coup d'état" attempt organized during election day in October 2016, it offered refuge for the group of Serbian nationalist accused of assisting in the organization of the attempted coup.²⁰⁶

Apart from differences in the political vision of the country, confrontational relationship between the SOC and the government is reflected in regulating the legal status of the SOC. The government failed to address unlicensed construction and tax evasion by the SOC on a number of occasions.²⁰⁷ The latest dispute occurred after the adoption of the Law on the Freedom of Religion or Beliefs and the Legal Status of Religious Communities²⁰⁸ which caused political tensions, violent incidents in the Parliament of Montenegro and the arrest of a number of DF's MPs at the end of 2019. The SOC has demonstrated its political strength in the power to mobilize and bring together tens of thousands of citizens to a series of protests against the law. These protests were regularly organized in different towns of Montenegro until the outbreak of COVID-19 pandemic. However, the SOC in several cases violated the ban on public gatherings introduced as a measure to prevent the additional spread of the virus. This led to new confrontations with the government, which the SOC depicted as the continuation of attacks by Montenegrin authorities.²⁰⁹

There is an Islamic community as a religious organization of Muslims in Montenegro. It is cooperating with Turkey, from which it receives help and support. This type of Turkish influence is not perceived as negative. Moreover, it is considered to have contributed to the fact that there is only a relatively small number of Montenegrin citizens leaving for war zones.²¹⁰ Since the beginning of the conflict, 26 Montenegrin citizens have gone to the battlefields in Syria, 10 are returnees and two have been sentenced.²¹¹ The Islamic Community in Novi Pazar in Serbia is also active in Montenegro and is often in confrontation with the Islamic community in Montenegro. It is believed that there are Arab influences on this community and that they are connected with extremist movements.²¹²

2. Political influence – symbolic politics

Score: 5

Score	Empirical assessment
1	There were no significant gestures made by politicians of Russia, China, Turkey, the Gulf states towards the given country, or vice versa. No particular alignment between local parties' programs with the foreign policy interests of authoritarian countries.
2	
3	There have been a few of symbolic gestures made, receiving little media coverage, which had marginal impact on policy-making. Political parties' programs regarding authoritarian countries are not particularly assertive or aligning with their interests.
4	
5	Numerous gestures were made, receiving massive media coverage, which had considerable impact on policy-making. Certain party programs align with the interests of authoritarian states, but no financial support is suspected.
6	
7	Many and/or strong gestures on political level. Impactful meetings and public incidents were prevalent, heavily covered by media. Some local political parties clearly have an agenda aligning with the interests of authoritarian countries, or they are even financed by them.

Montenegro and Russia have a long history of political relations that had been blossoming already before Montenegro became independent. Post-factum analyses show that Russia did not oppose Montenegro's independence in 2006, it was rather supportive to it through huge economic investments, but also through political contacts. Political consultant Paul Manafort confirmed that he was brought in by **Oleg Deripaska** to help with the Montenegrin referendum campaign. The leaked audio recordings of Montenegrin ambassador to Moscow at that time also indicate that Montenegrin officials have been using Deripaska's contacts to lobby in supporting country's independence.²¹³ Good political ties between two countries continued: in 2011, the ruling party signed a Cooperation Agreement with United Russia, the ruling party in Russia.²¹⁴

However, the Montenegrin government's turn to the West has led to a deterioration of bilateral relations and diplomatic conflicts. Montenegro imposed sanctions on Russia in 2014, when the EU accused the Kremlin of endangering the territorial integrity of Ukraine by annexing

Crimea. In December 2015, Montenegro received an invitation for full membership in NATO. Russia has frequently warned Montenegro not to continue NATO negotiations, followed by political, economic and media pressures. Montenegrin authorities have indicated that accession process was a turning point in Russian direct interference in the internal political relations of the country. DPS leader and President Milo Djukanovic considered Montenegro as a collateral effect of seriously neglecting Russia-NATO relations on the geopolitical scene.²¹⁵

This development of relations has led to the almost complete cessation of bilateral relations between Russia and Montenegro, and there have been almost no official visits between two countries.²¹⁶ However, DF leaders often visited Russia.

In 2015, the DF organized street protests demanding the establishment of a transitional government to ensure fair and free elections. DPS leader Djukanovic accused Russian official policy and nationalist circles in Serbia of being behind the protest organizers.²¹⁷ DF leaders have denied that the protests had anything to do with influences from Serbia and Russia. However, by the end of 2015, they had begun promoting their cooperation with Russia via meetings, signing a memorandum of cooperation and declarations.²¹⁸

The culmination of relations with Russia happened during 2016 parliamentary elections. Montenegrin security services arrested a group of Serbian citizens on election day on suspicion of planning to carry out terrorist actions with the aim of violently overthrowing the government and possibly the capture or assassinate then-Prime Minister Milo Djukanovic. According to the indictment filed against nine Serbian nationals, two DF leaders and their driver and two Russian nationals, riots were aimed at preventing Montenegro from joining NATO. The Special Prosecutor Office also indicted two Russian intelligence officials as the organizers. This case known as the "coup d'etat" received its epilogue in the first instance verdict of the court. Two Russian intelligence officers are sentenced to prison in absentia for the creation of a criminal organization and attempted terrorism. The court in a first-instance ruling also found two DF leaders guilty. The Russian Ministry of Foreign Affairs announced that the verdict "leaves no doubt in the politicization of the Montenegrin justice system and its susceptibility to external manipulations", emphasizing that it can only worsen Russian-Montenegrin relations, which are already at the lowest point in their history.²¹⁹ The trial process has been followed by a political clash and a series of controversies so that Montenegrin audience is still divided as to what actually happened on election day. Despite the first instance verdict, some believe that it is a political farce constructed by the DPS to gain electoral victory.

As a result of bad relations, in 2017 DPS's MP was arrested in Russia as a "persona non grata" and deported to Montenegro. This opened the question of the Russian black list of Montenegrin officials, which remains secret.²²⁰ The Russian Ministry of Foreign Affairs acknowledged that the entry ban was a response to the EU sanctions that Montenegro joined.²²¹

After Montenegro officially became NATO member state in 2017, the Ministry of Foreign Affairs of Russia announced that Moscow reserves the right to respond to the hostile policy of Podgorica.²²² Such tensions have not been noted in Montenegro's bilateral relations with other countries.

Since gaining independence, Montenegro has signed 17 cooperation agreements²²³ with China that relate to cooperation in the field of education, economics, infrastructure, health,

agriculture, rail transport or fight against corruption. Montenegro also participates in the 16 + 1 initiative established between China and 16 Central and Eastern European countries. Also, friendship groups were formed between the parliaments of the two countries.²²⁴ However, permanent problems in the highway construction project raise the question of its possible impact on further cooperation between the two countries. **Citing the highway as an example, the European Commission expressed suspicion that China is using economic engagement in the Western Balkans to expand its political influence on the EU.**²²⁵

Historical relations between Montenegro and Turkey had a hostile character until the Balkan Wars in the early 20th century, which marked the final withdrawal of the Ottoman Empire from the Balkan peninsula. After gaining independence in 2006, Montenegro established diplomatic relations with Turkey. **Turkey has supported Montenegro in negotiations with NATO and it is the eighth country that ratified Montenegro's Protocol to NATO in September 2016.** There have been several official visits organized between two countries. After the UAE recognized the independence of Montenegro in 2008, diplomatic relations were established.

3. Public opinion influencing

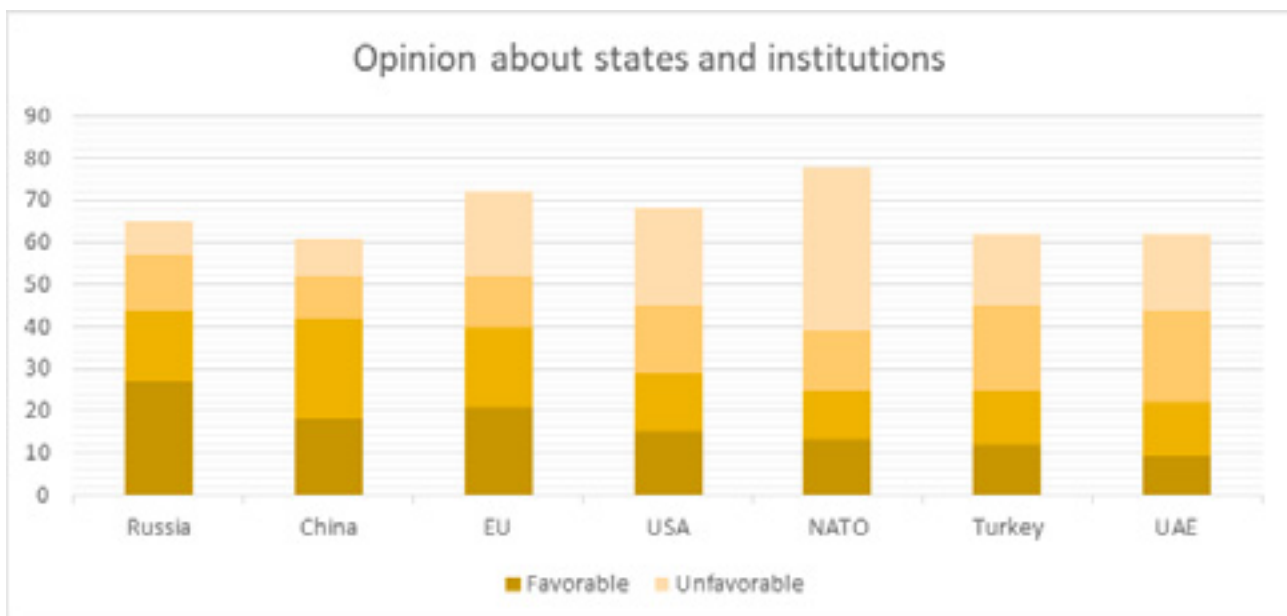
Score: 5

Score	Empirical assessment
1	No electoral events were accompanied by campaigns sponsored and/or backed by foreign authoritarian countries. No media portfolios or outlets are known for being owned by circles of foreign authoritarian powers. Authoritarian NGOs are not present, or if so, have no impact on the society. No fake news campaigns conducted to undermine pro-Western causes.
2	
3	Minimal possibility of influencing campaigns launched or backed by any authoritarian country. In the media space, marginal impact is reached by portfolios or outlets owned by circles related to the leadership of authoritarian countries, and their proportion of ownership is not significant on the media market. NGOs backed by these countries are present, but have marginal reach or impact on society. Although there are rare fake news campaigns they do exist, generally focusing on pro-Western causes, with marginal or negligible impact.
4	
5	Strong possibility of influencing campaigns backed by authoritarian countries. Significant part of the media portfolio is in the hands of circles close to the leadership of authoritarian countries, with considerable impact on the public opinion. NGOs backed by authoritarian regimes exert considerable influence on the public. There are considerable fake news campaigns launched to discredit pro-Western causes or stances.
6	
7	There have clearly been campaigns backed/sponsored by authoritarian countries. There have been significant acquisitions of media portfolios by circles tied to authoritarian countries. NGOs backed by foreign countries have strong influence on public opinion. Fake news campaigns conducted on large scales to discredit and undermine pro-Western causes and stances, with strong impact on the public opinion and discourse, or even setting the agenda.

Foreign countries are on the rise in public discourse with a focus on their commitment to helping the Western Balkans region and the chance to maximize the economic prosperity of regional countries. Although there is a generally positive attitude to Western actors, during the COVID-19 pandemic crisis the efforts were recorded to portray them as those who turned their backs on the region. **Public support for the process of Montenegro's accession to the European Union is stable** - it amounted 57% in 2013 and 65.9% in 2018.²²⁶ However, the Montenegrin public is strongly polarized towards the NATO. Despite the country's membership in the organization, a large majority view NATO negatively.²²⁷

The increase of foreign powers' presence in Montenegro makes an impact on public opinion. Opinion polls show that Russia and China outpace the favorability of Western actors.²²⁸ As shown by an opinion poll carried out in 2018, 45% of citizens have a favorable opinion on Russia and 41% on China. The most unfavorable attitude is noted towards NATO with 53%, followed by the USA and UAE (40% each). Additionally, Montenegrin citizens see Russia as militarily superior to NATO.²²⁹

Table 1: Russia, China and EU seen most favorable²³⁰



Media analysis on foreign relations and influence in Montenegrin media conducted in the period from October to December 2018 has shown that there is positive tone toward the West and China, while a negative one towards Russia.²³¹

A poll indicates that public opinion on China is mostly influenced by the media. A media analysis conducted by the Center for Democratic Transition showed that in 2019 the word China was mentioned more than 14,000 times in Montenegrin media, while for example NATO was mentioned in 10% less reports in the same period. According to this analysis, the dominant media articles concern the importance of the Bar-Boljare highway project, donations from the government of China in Montenegro, promotion of cooperation in all segments of society (governments, universities, schools, local governments, public services, academies of science...). This is followed by

the stories about the “marvelous” successes of Chinese society in science, art, infrastructure, technology, etc. In contrast, media stories about China’s political system, respect for human rights, the quality of life of its citizens and the inequalities that exist in their society are very rare. The analysis has shown that negative stories relate to media coverage of the situation in Hong Kong, endangered Internet freedoms and possible negative impact of China on Europe’s future. Media outlets also wrote about possible corruption in a highway project or jeopardizing the environment, which can indirectly be labeled negative.

A media analysis carried out in December 2019 shown that there is an almost daily dissemination of the narrative about the superior Russian weapons in Montenegrin media. These narratives are aimed at swaying the views of the readers in a specific direction that suits the political and ideological affiliation of those who create or commission such contents.²³² According to this analysis, the narrative surrounding the omnipotent Russian weapons, often accompanied by an anti-Western propaganda, tend to both create and sway public opinion in the region. One of the effects of the Russian narrative is that Russia is portrayed as a political, military and economic alternative to the West.²³³

4. Economic and technological influence

Score: 6

Score	Empirical assessment
1	<p>No, according to available data and experts' assessment, authoritarian powers did not exploit their position when (re-)negotiating energy supply-related contracts. No major infrastructural investments backed by these countries, or if there are, they are considered advantageous to the recipient country according to the expert community. Also, no influence in the banking sector. There is no leverage on the Balkan country via tourism, or if there is, it is marginal or not exploited.</p> <p>There are no high priority investments. 5G installation is transparent with real competition. The country's position on Huawei is in line with the US's, and did not change during time.</p>
2	
3	<p>According to the assessments, the (re-)negotiation of the energy supply contracts was not quite advantageous to the recipient country, but it is still on the 'fair' side. A few major infrastructural projects were realized without scandals, they seem rather reasonable. They do not seem to be financed by particularly disadvantageous financial plans either. There is mild, or suspected influence in the banking sector, but it is very limited. There have been hints that leverage via tourism could be exploited, but not seriously, or it would have marginal effects on the given country.</p> <p>There are a few high priority investments, the 5G installation process is rather transparent, but with very limited or controlled competition. The country's leadership is rather hesitant, or changed its point of view regarding Huawei recently.</p>
4	
5	<p>There are numerous high priority investments. The 5G installation process is not quite transparent, and there is no real competition, authorities rather apply secretive steps, though it is still possible to access data on the process at least partially. The leadership is rather pro-Huawei, but does not seem to be entirely committed. There might have been a shift in position regarding this topic.</p>
6	

Score	Empirical assessment
7	<p>The authoritarian state clearly exploited its position in the (re-)negotiation of contracts. Large scale infrastructural investments, backed by an authoritarian state, have been very disadvantageous to the recipient country according to the expert community and/or hard data. There is a strong influence in the banking system. Also, the leverage on the country via tourism is huge, and is actively being used to blackmail and influence.</p> <p>There are many high priority investments of large volume. 5G installation is entirely non-transparent, total lack of competition, and a strongly secretive behavior is dominant on the authorities' side. No competition known, the leadership is openly pro-Huawei and there are large investments of the company in the country.</p>

Montenegro is a small, open economy that is highly dependent on foreign direct investment (FDI). Relative to the size of the economy, Russian presence in Montenegro has been on average the largest in the whole SEE region.²³⁴ Up until 2013, Russia controlled the largest company in Montenegro, Podgorica Aluminum Plant (KAP), and had become the single largest foreign investor in the country, mostly in real estate and tourism. Despite the deterioration of bilateral political ties in 2015-2016, Russia has continued to be among the leading investors in the country. According to Central Bank data, Russia was the largest investor in 2019 followed by Hungary, the United Arab Emirates, Switzerland, Germany, Virgin Islands (GBR) and Turkey. However, a significant part of the investment flows comes from countries and territories designed as offshore financial centers. During 2015-2019, the total inflow of FDI directly originating from Russia was around EUR 320.4 million, UAE around EUR 250 million, Turkey around EUR 146 million, Hong Kong around EUR 8 million and China around EUR 2.5 million. Russian FDI made up roughly 8.6% of the total FDI, while UAE's investments accounted to roughly 6.7%.

Data do not show expansion of companies owned by Chinese citizens, which is in stark contrast with the trends shown by Russian and Turkish companies.²³⁵ There are 2726 companies operating in Montenegro, founded by legal or natural persons from Turkey.²³⁶

The acquisition of KAP, aluminum plant in Podgorica by the Russian oligarch Oleg Deripaska, is the biggest Russian investment in Montenegro to date. KAP's importance for the Montenegrin economy was at the time enormous, as the plant's output made up more than 50% of the country's total exports, and contributed to approximately 15% of country's GDP, employing 2.3% of all workers in the country. However, the global economic crisis had an enormous impact on Deripaska's businesses, leading reportedly to billions in losses and made KAP unable to fulfill its privatization agreement to the state.²³⁷ In the wake of the company's unsuccessful operations, large losses and outstanding liabilities, the government launched bankruptcy procedures in 2013 that is still ongoing. Deripaska has launched a series of disputes against Montenegro before domestic and foreign courts over alleged breaches of the settlement agreement that caused the bankruptcy. So far, two arbitration proceedings have been completed in favor of Montenegro, while the third proceeding commenced in 2018. According to verdicts, Deripaska owes EUR 1.5 million to Montenegro, which he refuses to pay.²³⁸

Tourism is the most important pillar of the Montenegrin economy that made up 21.6 % of country's GDP in 2018 according to World Travel & Tourism Council data.²³⁹ After Serbians, Russian tourists make up a largest portion of foreign tourists' volume. In 2019, Russian tourist arrivals made up 15.3% of total visitors. Among non-European countries, the largest portion came from China (together with Hong Kong) with 3% of the total.²⁴⁰ Russia's negative media campaign about Montenegro as an unsafe tourist destination that followed the NATO accession process did not significantly affect the portion of Russian tourists' visits. The total number of Russian tourists' arrivals slightly fell in 2015 (6%) and in 2018 (3.4%).²⁴¹

Although the tourism sector is most vulnerable to Russian influence, corporate presence is dispersed, making it difficult for establishing direct control.²⁴² Russian nationals bought numerous apartments and houses on the coast and Russian investors own some of the most popular hotels. There have been little or no consequences for Russian investors that failed to implement the privatization agreements in several cases. They continue to expand their share in this market, and will continue to do so after the announcement of a Russian investment in a tourist complex in the Budva Riviera.²⁴³

Unlike in some other countries in the region, **it does not appear that Russia aims to control the Montenegrin oil and oil derivatives market, which remains largely diversified and competitive. Sales volumes are small, and there is little room for expansion.**²⁴⁴

Montenegro is highly dependent on energy supply imports. Jugopetrol, owned by the Greek partially state-owned oil company Hellenic Petroleum is the largest fuel distribution company with 35 gasoline stations, followed by Lukoil Montenegro, a daughter company of Russia's private oil major, which owns 11 gasoline stations. The civil sector criticized the fact that Montenegrin citizens pay one of the most expensive fuel prices in the region, claiming it to be a result of government's bad decision to sale the Jugopetrol company.

Montenegro has no gas market as of today. Italian-Russian consortium comprised of Novatek, Russia's second largest natural gas producer owned by oligarchs Leonid Mikhelson and Genadi Timchenko, and the Italian company ENI were awarded a 30-year concession for oil and gas exploration in the Montenegrin coast in 2006. ENI is accused of corruption in three countries²⁴⁵ and Novatek is on the US and EU sanction lists.

The Montenegrin government negotiated with the Russian Belon Group concerning the sale of a coal mine and thermal plant, Pljevlja, in 2007, but there was no consensus in the ruling coalition on this issue. Thus, the Parliament of Montenegro opposed the privatization plan.

In 2009, the Montenegrin government initiated the privatization and recapitalization process of the national electricity company (EPCG). Italian company A2A bought 41.75% of the shares in EPCG and committed to meeting a number of indicators while managing the company, which it failed to achieve. After the contract with A2A expired, the company started the process of withdrawing from the ownership and management structures of EPCG in 2017. Then, a dispute emerged regarding the construction of the second block of the thermal power plant in Pljevlja. After lengthy negotiations, shares were bought back from A2A in the previous year, so the state now holds 88.12% of the shares in EPCG.

China has become an important economic partner to Montenegro. However, business arrangements with Chinese investors are often shrouded in secrecy and accompanied by public criticism for the unprofitability and cost-effectiveness of projects. There are agreements with the Chinese actors that contain a provision according to which the arbitration proceedings take place before the courts in Beijing, which is an unusual choice that may significantly affect Montenegro's interests in case of dispute.

The procurement of ships for state-owned companies Montenegrin Navigation and Bar Navigation was the first major business arrangement between China and Montenegro. The government issued state guarantees worth USD 93.7 million to these companies in 2010 and 2013. Loan arrangements were made in collaboration with the Chinese company Poly Technologies, which built the ships while the Chinese state-owned EXIM Bank secured the loan. It is stipulated that in the event of dispute the arbitration will be organized in Beijing.²⁴⁶ Vijesti and NGO MANS indicated in 2016 that business arrangements were contracted without valid economic analyzes on the cost-effectiveness of these projects and at the time of the biggest financial crisis, thus there is a real danger that a significant part of the state guarantees will be paid by Montenegrin citizens.²⁴⁷

The construction of the largest infrastructure project in Montenegro – the Bar-Boljare Highway – is the one major business arrangement with China. The government of Montenegro and Chinese companies CCCC/CRBC signed the Design and Build Contract for the construction of a priority section of the Bar-Boljare highway in February 2014.²⁵⁴ The Ministry of Transport and Maritime Affairs and the Ministry of Finance submitted a loan application to the Exim Bank of China, and the Preferential Loan Agreement was signed in October 2014. Both contracts and the Draft Law on the Bar-Boljare Highway were submitted to the Parliament, which adopted it in December 2014.²⁵⁵ It was agreed that Beijing had jurisdiction in the case of arbitration and Montenegro relinquished significant budget revenues by agreeing to give the constructors numerous tax breaks. CRBC is on the World Bank's black list which, as indicated in media, means that it wanted to reach certain agreements through bribery and corruption.²⁵⁶ However, the lack of public scrutiny allowed the realization of the negotiation process.

The contract sets the value of the works for the construction of the priority section at EUR 809 million, which is 23% of GDP (2014). Exim Bank is providing a USD loan worth 85% of the total cost, while the rest will be provided by the state. The loan carries a 2% interest rate and a 20-year repayment period. Given that the loan agreement was concluded in dollars, subsequent USD appreciation and unhedged currency carries a risk of increased cost by a further 18%. The Ministry of Finance pointed out that the final analyzes on the impact of exchange rate differences on the loan can be made after the repayment in 2025.²⁵⁷

Disputes between the government and CRBC on additional works, which were not contracted by the project for Phase 1, started back in 2015, which was released to the Montenegrin public only in 2017. At the beginning of 2019, the government acknowledged that additional works on Phase 1 would increase costs by at least EUR 113 million. On the contrary, China's CRBC estimated costs to grow by EUR 144 million in its 2017 financial statement.²⁵⁸

In March 2019, NGO MANS filed a criminal complaint against the president of the Parliament of Montenegro and the former minister of transport and NN persons that participated in the preparation of the contract for the construction on suspicion of abusing their official powers and failing to perform their official duties given that they did not envisage a series of additional works, damaging the state budget by about EUR 134 million.²⁴⁸

Number of domestic and foreign analysts and institutions, including the European Commission and the IMF, have questioned the utility of the highway project as it presents serious risk to public

finances in Montenegro. Media and NGOs question the involvement of corruption in the overall project, given the lack of transparency of the process and participation of companies close to the ruling party.

The development of the construction process also raise the question whether the Chinese contractor was actually the most favorable. It was recently announced that the CRBC requested an extension of the deadline and additional payments, without information on the amount.²⁴⁹ MANS warned that a new postponement of the deadline would further delay the moment when the state will start generating income from the project, and that possible additional payments would affect the government's ability to fulfill its obligations in the beginning of loan repayment.²⁵⁰

The first and largest investments of the UAE in Montenegro is the Atlas Capital Center – later named The Capital Plaza, a business-residential complex realized in cooperation with the Montenegrin company Atlas Group, the royal family from Abu Dhabi and the company Capital Investment. According to media information, more than EUR 120 million were invested in this project.²⁵¹

A 5G network has still not been established in Montenegro, while the preparation of a study; i.e., the introduction strategy is planned for this year. Simultaneously with the preparation of the study, the procedure of radio frequency allocation is being prepared. The auction of lanes for 5G mobile networks is planned for the second half of 2021.²⁵² The regulatory agency and mobile companies operating in Montenegro announced that the first 5G networks in Montenegro could be expected by the end of 2022.²⁵³

5. Educational influence

Score: 4

Score	Empirical assessment
1	No university partnerships or scientific agreements concluded.
2	
3	A few partnership and scientific agreements established, on an occasional basis, but with no significant financial support and/or small overall capacity. Also, the public does not know about it, it does not receive significant media attention.
4	
5	Certain university partnerships and scientific agreements are established, primarily long-term ones, with financial support from the authoritarian country, and/or of significant capacity. It receives decent attention from the media and is quite known by the public.
6	
7	Significant long-term university partnerships concluded, accompanied with strong financial support from an authoritarian country. Scientific agreements concluded, with large media attention.

Montenegrin students are increasingly interested in exchange programs and foreign government scholarships. According to the Ministry of Education, students are most interested in scholarships from China, Hungary, Russia, Italy, Slovenia and Croatia.²⁵⁹

The data of NGO Organization of Montenegrins Studying Abroad (OMSA) from 2017 show that 14001 Montenegrin nationals are studying in more than 35 countries. Excluding the countries of the region, the highest number of Montenegrin students are in Turkey (24%), Italy (17%), Austria (15%), followed by the Russian Federation (9%), UK (4%), China (4%), Germany (3%), USA (2%).²⁶⁰

Turkey is becoming one of the more preferable study destinations with the active engagement of the Turkish Embassy. In the 2018-2019 academic year, 229 Montenegrin students moved to Turkey.²⁶¹

Interest in studying in China is growing as the Chinese government provides scholarships for Montenegrin students. The Ministry of Education states that from 2013 to 2016, China increased the number of annual scholarships for students from Montenegro. From the 2016-2017 academic year, 63 scholarships for studying in China were awarded.²⁶² Exchange programs and study visits in China are also very frequently organized for representatives of various sectors in Montenegro – not only the academic community but the economic sector, public administration, media, etc.

In 2015, the Confucius Institute was established at the University of Montenegro in partnership with the Changsha University of Science and Technology. The institute organizes Chinese language courses and HSK tests of the Chinese language, but also workshops for better knowledge of Chinese culture, cooking courses and ancient martial arts.²⁶³ Courses are organized in kindergartens, primary and secondary schools and at two universities. The Confucius Institute has opened 48 Chinese language classrooms throughout Montenegro, the number of students is almost 400, and more than two thousand classes are held each semester.²⁶⁴ In addition, it was announced that the Chinese language would be included as an elective subject in a number of faculty units.²⁶⁵ The Chinese and Montenegrin governments are already agreeing on signing the "Agreement on Mutual Recognition of Higher Education Diplomas" and the "Agreement on Cooperation in Education 2019-2022".²⁶⁶

The manifestation of the Days of Russian Culture is being celebrated in Montenegro. Russian cultural centers are also active in several cities. The Ministry of Education and Science of the Russian Federation regularly awards scholarships to Montenegrin citizens. This country is the most popular educational center in Eastern Europe, where, according to OMSA data from 2017, over 58 Montenegrin students study with a special interest in architecture, psychology, medicine and international relations.²⁶⁷

Russian children in Montenegro mostly attend Montenegrin schools, but there are also two schools in Budva that run Russian educational program. In the Montenegrin education system, 493 Russian citizens are educated – 76% of them in primary schools. The two schools in Budva are attended by 90 students.²⁶⁸ The first Russian school on the Montenegrin coast called "Dukley Academy - Center of Continued Education" was founded in 2016. The school allows its students to study in their mother tongue and obtain a state Russian diploma, and Montenegrin is also taught as a compulsory language.²⁶⁹

COMPARATIVE CHAPTER- BASED ON THE COUNTRY CHAPTERS

1. Churches in politics

In Montenegro, the Serbian Orthodox Church (SOC) takes an active role in public opinion shaping, voicing political opinions, often behaving as a counter pole to pro-West governmental actions and stances. Hence, the SOC voiced strong disapproval of the imposition of sanctions against Russia and the NATO accession process, which the church presented as the betrayal of Russia and the Orthodoxy. SOC influential position has been manifested over the past year when it was able to mobilize tens of thousands of citizens to protest against a law on religious freedom that was adopted in the end of 2019, communicating it as governmental attack on them.

The example of the Orthodox Church in Bosnia and Herzegovina, which belongs to the SOC, suggests that voicing pro-Russian political opinions and stances is a recurring phenomenon, with a similar case being seen in Montenegro. The Islamic Community in Bosnia and Herzegovina sometimes receives financial support from Turkey, primarily to restore ancient religious buildings and infrastructure from the Ottoman era. Although Turkish influence seems to be rather limited, in general terms it remains more influential than the efforts coming from the Gulf states. On the other hand, Salafi Islam groups, the religious school of which is rejected by the majority of the rather liberal Bosnian Muslims, receive substantial financial help from Gulf states, although their influence has been on the decline since the Yugoslav Wars. Most visibly, this support manifests in construction and reconstruction of mosques and education of preachers.

In North Macedonia, foreign influence seeking through religious means seems to be limited, with relatively small and occasional financial sums from abroad. The biggest donors of both the Macedonian Orthodox Church (MOC) and the Islamic Community of Macedonia (ICM) are from the diaspora. Besides the diaspora, Turkey and the Gulf states support financially the Islamic community, in a similar pattern to that of Bosnia and Herzegovina; The MOC does not receive support from third countries yet some Russian style Orthodox churches were financed from private investors. Turkey supports predominantly Ottoman heritage renovations, while about 700 mosques are out of the reach of ICM, run by imams educated in the Middle East, with some of them reportedly advocating for the Salafist school.

2. Political influence- symbolic politics

In Montenegro, the traditionally strong political ties between the former governing party and Russia's ruling United Russia party cooled down fast with the Montenegrin government's turn to the West, imposing sanctions on Russia in 2014 and receiving the invitation for a full NATO membership. Coup d'état in 2016, in which two Russian intelligence officers were involved, was accompanied by the suspicions and claims of Russian financial support or other involvement with the ultimate intention of preventing Montenegro to join the NATO.

Given Bosnia and Herzegovina's complicated political and social structures, Turkey and Russia exert influence on specific entities, rather than on the whole country. Russia openly

supports the Republic of Srpska and Serb politicians, and the biggest Serb political party's leader Milorad Dodik has frequently visited Vladimir Putin in Moscow and regularly consults with the Russian ambassador. Turkey has strong ties with Bosniak politicians. Erdogan openly supports the biggest Bosniak party (SDA) and his party representatives regularly attend SDA's events. China is seen as more neutral and mostly economic player with its influence being on the rise. The Gulf States have certain but not too visible presence.

North Macedonia had very frequent bilateral meetings with Turkey in the recent years, and Turkey ratified the NATO Accession Protocol in 2019. However, **Turkey's request to North Macedonia on the extradition of 15 people associated with Fetullah Gülen that the country did not fulfil is an obstacle in further deepening the bilateral relations.** Russian- North Macedonian relations cooled down in 2015, in the first wave of the wiretapping scandal, when Russian MFA and Embassy repeatedly endorsed the Gruevski government's position against the Zaev- led opposition. During the name dispute, **Russia also voiced strong opinion**, which the new government interpreted as an interference in domestic politics, and even expelled a Russian diplomat. Currently, only parties with marginal effect and ratings promote closer cooperation with Russia, not with the EU. **Besides the numerous high-level meetings in the recent years between North Macedonia and China, its symbolic gestures were visible during the pandemic**, as the country donated protective equipment to North Macedonia and the Chinese Embassy donated funding to the North Macedonian Ministry of Health. There were numerous high-level meetings between North Macedonia and the Gulf states too, though **political influence on the country altogether seems to be moderate, with Russian influence expected to decline and Chinese to grow.**

3. Public opinion influencing

Montenegrin public support to the EU accession remains stable, while strongly polarized towards the NATO. Increase of foreign powers presence in Montenegro makes an impact on public opinion - opinion polls show that Russia and China outpace favorability of Western actors. Montenegrin population is divided ever since on what actually happened on Election Day in 2016. **The media coverage of China is predominantly positive**, especially focusing on the necessity of the Bar-Boliare highway project and Chinese grandeur in various fields of life. Russia's media representation focuses on military capabilities and the country being an alternative to the West.

The way of Russian public-opinion influencing in Bosnia-Herzegovina generally is via Serbian transmission and public media in the RS. Chinese Xinhua News has a local branch in the country, while Turkey's imprint on the media scene is operated through Sarajevo-based office of Turkish Anadolu agency, whose content is regularly transmitted by local media including mainstream Bosniak media. Among Gulf states, predominantly Qatar is present with Sarajevo-based Al Jazeera Balkans (broadcasting in language common to BiH, Serbia, Croatia and Montenegro).

In North Macedonia, while there is no official evidence, various reports and investigations suggest that Russia strongly backed the boycott movement in the referendum on the name issue that was virtually the last obstacle to country's NATO accession. Influence through the media space due to language similarities comes from Belgrade as well. From the foreign-owned media outlets, Qatari Al Jazeera Balkans based in Bosnia and Herzegovina has a local office in North Macedonia. **Turkey backs a network of NGO-s, but their reach and potential seems rather limited.**

4. Economic, energy and technology field

In Montenegro, the most vulnerable sector to Russian influence is tourism, and Russia did exploit this leverage in the time of NATO accession conducting a negative campaign against the country. Economic influence-wise, **China's presence has become visible.** There are concerns about ongoing and high-volume Chinese-Montenegrin Highway infrastructure project, with international organizations and the media questioning their transparency and effectiveness whilst highlighting the corruption and debt risks.

Bosnia and Herzegovina's natural gas and oil supply depends entirely on Russia, with no diversification, hence at negotiations the country is in an inferior position, that Russia uses well when it comes for instance, to privatizations. **China actively seeks acquiring infrastructure projects,** there are several ongoing ones and one finished in the thermal power domain. **Turkey is also economically present and has invested in a few infrastructure projects, but to a much lesser extent than China.**

In North Macedonia, Chinese loans were primarily involved in the construction of two major highways and other infrastructure projects and other infrastructure projects. They often go with high secrecy and with unfavorable provisions. Furthermore, the shadow of corruption embraces them as in the 2015 wiretapping scandal certain records leaked on the PM and Minister of transport discussing the commission for awarding a contract to the Chinese. **Russia's influence is most palpable in the energy sector,** as all natural gas comes to the country from Russia. Gazprom's monopoly, and North Macedonia's involvement in the South Stream project have been widely criticized. **Turkish infrastructural investments are primarily** airports, while number-wise, Turkish tourists are more significant for the North Macedonian tourism sector than Chinese or Russian.

5. Educational influence

Foreign exchange programs' popularity is increasing among Montenegrin students. There are specific Chinese scholarships for Montenegrins, study visits and exchanges are common with China not only on the academic field but in other fields as well. Confucius Institute operates 48 Chinese language classrooms, and Chinese as an elective subject in faculties becomes more and more accepted. Russian cultural centers operate in several cities, and scholarships are available to Russia, and two Russian schools are operated.

Between Bosnia and Herzegovina and Russia there are a couple of university partnerships, concentrated in Republika Srpska. **China also shows interest** in educational cooperation, and a Confucius Institute operates in Sarajevo. **Turkey has the largest influence in this field though,** there are two Turkish universities, and several Turkish schools. **Gulf states unofficially support Salafi religious studies.**

In North Macedonia, Turkey has by far the biggest impact regarding education. Many schools and educational institutes operate, and several of them belong to the Maarif Foundation established by the Turkish Parliament in June 2016 to assume the administration of overseas schools linked to FETO movement. At a university a Confucius Institute and a Russian cultural center operate, but their influence is marginal compared to the Turkish infrastructure.

POLICY RECOMMENDATIONS

For the Transatlantic community

- Western international institutions, especially the European Union (EU) and the North Atlantic Treaty Organization (NATO) should strengthen their strategic communication towards the region of the Western Balkans. While the EU is the main economic partner for the Western Balkans countries in both exports and imports, and NATO is the guarantor of collective security in the Transatlantic community, these facts have to be communicated more intensely and in accordance with local needs. Those organizations should make better use of various online and offline channels to get closer to the citizens of the Western Balkans region and raise awareness not only about economic and security advantages of those partnerships, but also about the normative and democratic nature of their systems.
- Not only should Western international organizations communicate the current advantages coming from their involvement and partnership with the Western Balkans countries, they also should follow up more clearly and plainly communicate the future steps in deepening those partnerships in the near future. EU institutions should encourage the consensus amongst EU member states in order to move closer to the accession process of the Western Balkans countries in to the EU, while providing incentives for the local governments of the Western Balkans countries to implement necessary reforms.
- Western donors and organizations should pro-actively provide resources and transfer their know-how to support creation and modus operandi of independent media with transparent ownership in the Western Balkans. Functional systems of not only providing grants, but also systematic training programs for local journalists and editors might help strengthen the media market, build investigative capacities as well as increase the trust of the local society when it comes to the mainstream media.

For non-governmental organizations and media

- In order to increase effectiveness of any local efforts conducted by the local civic sector, non-governmental organizations should step up their coordination within individual countries, but also regionally. Since foreign hostile influence is a wide problem affecting many areas of democratic life, no single organization can work alone to counter it. International partnerships, as well as allying with the media can significantly increase the chance to fight against disinformation.
- Non-governmental organizations and journalists can work together to raise awareness about the value of quality journalism and the basic processes of how mainstream media (should) operate. Bringing the knowledge of the daily work of journalists and editorial offices closer to citizens, especially to vulnerable groups (students, senior population, people living in rural or more distant regions) can increase the trust of those parts of society towards mainstream journalism, but also decrease the tendencies to share disinformation.
- Both non-governmental organizations and the media can use their resources to raise awareness about the realities of authoritarian regimes attempting to influence the domestic affairs

in the Western Balkans countries. Providing objective and accurate information about the state of living in Russia or about the breaches of human rights in China will put more perspective into the decision-making about which partnerships are the most desirable for the Western Balkans.

- Local non-governmental organizations should use their know-how to step up their advocacy activities with local governments and parliaments on the issues of disinformation and foreign hostile influence. While fact-checking and debunking of disinformation are necessary tools to analyse the problem, advocacy for concrete measures is what can make the change easier on a more systematic level. NGOs can call for a “whole society” approach, following the pattern of the most successful European countries in fighting foreign hostile influence, such as the Baltics or the Scandinavian states. Both formal and informal platforms should be used to approach policymakers and decision-makers if possible, ideally not by individual NGOs, but in a coordinated coalition.

For local decision-makers

- In order to build resilience within local society, national governments should work on incorporating media and digital literacy into the national curriculums. While this is a long-term measure which would provide positive results in the more time-distant perspective, it is a necessary building block for a healthy democratic and resilient society.
- National governments should ensure transparent financing of political parties and movements. Reasonable regulation of transparency and the general possibility for political parties to receive foreign funding would increasingly prevent foreign hostile influence on the political level.
- National parliaments should propose legislation for a mechanism of screening risky foreign investments. The goal of such a legislation would be to better consider the security aspect while choosing contractors for public procurement, especially in strategic sectors with high influence on national security (i.e. energy or infrastructure).
- Local governments should increase their cooperation with EU and NATO agencies, including the EEAS Western Balkans Task Force within the Stratcom division, NATO Stratcom CoE, and Finnish CoE on Countering Hybrid Threats, with the goal to become observing or participating members. Those partnerships will not only provide new platforms for experience sharing, but might also improve the positions of local governments in the Western Balkans vis-a-vis social media giants such as Facebook or Google.

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