

A world map with a light gray background and white country outlines. China is highlighted in a dark blue color, and North Macedonia is highlighted in a lighter blue color. The map is centered on the Atlantic Ocean.

# The place of North Macedonia in China's strategy for the Western Balkans

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## Is there a Chinese strategy for the Western Balkans?

Since the beginning of its process of 'opening-up' on a global scale, the People's Republic of China (hereinafter referred to as China) has made great progress in its efforts to become one of the most relevant actors worldwide in most policy areas. Its skyrocketing economic growth, especially during the 1990s and the 2000s, has provided leverage in terms of trade and investments, which China has not hesitated to use for promoting its foreign policy goals.

Following the global financial crisis, which left China virtually unscathed, the Chinese economic model has been often put forward as an alternative to the Western values of liberal democracy and market economy, especially for underdeveloped and developing countries in Asia, Africa and Latin America. However, the globalised approach which China has adopted during recent years aims to promote its model well beyond the boundaries of the so-called Third World, and into the realm of the European Union. The 17+1 cooperation with Central and Eastern European Countries (CEEC) and the Belt and Road Initiative (BRI), launched in 2012 and 2013, respectively, are the most prominent examples of Chinese

efforts to engage with countries that are not in its neighborhood and have thus far been left out of its foreign policy priorities. While the results and impact of these policies are debatable, China's initiatives have raised an alarm in Brussels and thus led to a renewal of EU engagement in the countries in its immediate area of interest: the Western Balkans (Pavličević, 2019).

The WB region has always attracted the interest of the surrounding regional powers, Russia and Turkey, with its geostrategic location. Throughout their long-standing engagement in the region, they have developed clear strategies, based on vested interests and traditional alliances. China's objectives and actions, however, remain relatively vague, both for local policy makers and for its Western partners, the EU and USA. Some scholars refer to the Chinese engagement in the WB in terms of traditional concepts enshrined in the Chinese foreign policy principles, such as mutual benefit and win-win situations (Zhou, 2004:6). Others quote concepts which have been recently developed by the highest Chinese political level, such as harmonious and peaceful development in a "community of shared destiny" (State Council, 2011), whereas some perceive China as the "true predator" in the region (Mirel, 2019), or a threat to the EU's unity (Turcsanyi, 2014).

*Image source: unsplash.com*



The paper at hand aims to shed light on the Chinese agenda for the region, mainly focusing on North Macedonia, but also drawing comparisons to the other WB countries when relevant, in order to identify emerging patterns. Given the lack of goals and objectives explicitly defined by the Chinese side, the determination of patterns would be crucial in order to find out whether there is a purposeful strategy behind the Chinese presence in the WB, and if that is the case, what the strategy consists of and what it implies for North Macedonia. Finding an answer to these questions is necessary for devising an appropriate “China policy” which would help the authorities maximise national interests and avoid potential pitfalls. While this paper does not provide a comprehensive account of all the interactions between Macedonian and Chinese stakeholders, it refers to the most pertinent and illustrative examples, especially concerning economic cooperation, the area in which China has the biggest clout in the region, including trade, investments, and different infrastructure projects.

In the next section of the paper, Chinese presence in North Macedonia will be examined, with a focus on the distinction between public contracts and involvement by stakeholders directly supported by the Chinese government (e.g., state owned enterprises and banks, the Confucius Institute), and private capital flows. In the third section, Macedonian participation in the Chinese-led BRI and the 17+1 cooperation will be analysed. The third section is concerned with the Sino-Macedonian relations through the lens of the EU integration process. At the end, conclusions will be drawn and policy recommendations provided.

### Chinese presence in North Macedonia

Since the re-establishment of diplomatic relations with the People's Republic of China following the recognition of Taiwan's independence by the Macedonian Government in 1999 and its subsequent withdrawal, China has been present in North Macedonia mainly with projects in the public sector, including public contracts and development assistance (grants and preferential loans). While most of the contracts have been

concluded by Chinese state entities, the presence of private companies is relatively scarce.<sup>1</sup> This approach is largely in line with China's traditional preference to work with state representatives rather than non-governmental organisations or businesses, reflecting the domestic regime, where the state (or rather the party-state, since the lines between the two are blurred) is omnipresent and regulates all aspects of international interaction.

North Macedonia has received both Chinese state bank loans and development cooperation funds. It was the first country of the 17+1 cooperation platform to make use of the US\$ 10bn credit line made available for infrastructure projects. In addition, it is the first European country where China attempted to implement the development cooperation model already tested in Asia and Africa by entirely funding and constructing a primary school (Rajko Žinzifov in the municipality of Kisela Voda). According to general Chinese procedures, all projects implemented with Chinese funding need to be implemented by a Chinese, usually state owned, enterprise (SOE). The contractor can be directly determined by the Chinese Government, as was the case with CWE for the construction of the Kozjak hydropower plant, selected through a public tender procedure in China, as was Huawei for the implementation of the E-Education project, or selected by Macedonian authorities among several companies pre-selected by Chinese institutions, as was Sinohydro for the construction of the highways between Kičevo and Ohrid as well as Miladinovci and Štip. In none of the three

*Image source: english.republika.mk*



cases did the procedure comply with Macedonian legislation on public procurements, which is largely harmonised with the EU *acquis* in order to ensure transparency, fairness and efficiency. In two other cases, where funding was provided from the Macedonian budget and a loan from the European Bank for Reconstruction and Development (EBRD), Chinese SOEs won public bids by regular procurement procedure: Yutong was selected to supply the City of Skopje with 202 double-decker buses, and CRRC Zhuzhou to supply electric trains.

When it comes to Chinese private companies, North Macedonia is not among the top destinations for foreign direct investments (FDI) for them, neither in terms of acquisitions nor greenfield or brownfield investments. Haier, formerly a Chinese giant in the electronic industry, won the tender for the Government's landmark project "A Computer For Every Child". In 2009, the company announced a joint investment worth EUR 9 million to produce LCD TV sets with the South-Korean company Triview (Prizma, 2017 a). Weibo Group, a Turkish-Chinese joint venture, was supposed to open a textile plant in the North-East (Rankovce), with an initial capital of US\$ 180 million, due to amount to US\$ 400 million within 5 years, and to create 5000 jobs (Prizma, 2017 b). Both investments failed to materialise, however, neither side has yet delivered an official explanation. Despite the former Government's proposal to create a special free zone for Chinese companies, reiterated at all the 17+1 summits until 2017, the Chinese side is not showing any interest, and Chinese FDI in North Macedonia remain insignificant (Krstinovska Blazheska, 2018).

Chinese engagement in Serbia, in comparison, is not limited to public contracts, the number of which is huge (Corridor X railway and highway sections, Corridor XI highway, Mihajlo Pupin bridge, Kostolac thermo power plant, to name just a few), but also includes a number of mergers and acquisitions, such as the Smederevo steel mill, RTB Bor, Sever, Johnson Electric, etc., and the recently announced major greenfield investment from Linglong tire factory. In Albania, China has not won any public contracts despite

the privileged relationship until the 1990s. Instead, China has focused on the acquisition of foreign-owned shares in around 100 Albanian companies, including some sensitive areas such as copper mining, oil fields management, airport management, etc. China's landmark project in Montenegro, the construction of the Bar-Boljare motorway (with a 85% Chinese loan amounting to EUR 890 million), has provoked mixed reactions. On one hand, the Montenegrin authorities and citizens claim that it is a much needed project for the country's future development and economic growth. On the other hand, with the economy's size and debt level approaching 80%, some scholars refer to the project in order to describe China's debt trap diplomacy in the Balkans (Doehler 2019). In Bosnia and Herzegovina, Chinese banks are lending funds for the construction of the privately owned thermo power plant (TPP) in Stanari and an additional block of the TPP Tuzla, which is conducted by Chinese companies. Both projects undermine the EU's environmental standards and thus challenge China's efforts to present itself as an environmentally responsible power.<sup>2 3</sup>

In any case, we should be aware that China is quick to learn, and its methods increasingly resemble those of the EU and USA. Its initial preference to work with government institutions is slowly expanding to include other stakeholders from the region, such as universities, research institutes, think tanks, chambers of commerce, etc. In the framework of its cooperation, China creates its own organisations and networks, such as the BRI studies network, the 17+1 think tank network, the China-CEE Institute in Budapest, the Global Partnership Centre in Sofia, etc. This approach allows China to accomplish multiple objectives: to gather analytical information on the foreign countries' policies towards itself; to investigate the perceptions on China in various countries and to influence positive changes in the public opinion; to obtain quality insight regarding its policies in order to adjust them and increase their efficiency; and to promote its development model and itself as a soft power in the WB on a par with the EU and the USA.

### North Macedonia within the BRI and 17+1 cooperation

North Macedonia, like the other WB countries supports the BRI through a Memorandum for Cooperation signed in 2014. However, until present day, it does not have any significant activities in the initiative, nor it participated in its official high-level events.

The BRI, launched in 2013 by President Xi Jinping in Kazakhstan, aims to connect Asia with Europe and Africa through major infrastructure projects, trade facilitation, financial integration and cooperation in other areas. Although it is usually referred to as a renewal of the ancient Silk Road, today it engages around 100 countries on 4 continents and projects worth several trillion US\$. There is no publicly available comprehensive list of participants and projects, nor a document with precise definition of its scope, objectives and instruments. Such a vague conception and loose institutional framework leaves a lot of room for useful flexibility on one hand, allowing each country to take from the BRI something that would suit its interests. On the other hand, the lack of precision raises concerns regarding its transparency, intentions and the results achieved.

The basic motto of the initiative is the “mutual benefit” that China and the participating countries should be able to draw from it. Usually it is associated with major infrastructure project implemented with funding from Chinese state-owned banks and built by Chinese state-owned enterprises. While the period of 6 years may be too short to evaluate the achievements, it is still impossible to single out major successful projects or to determine significant benefits for the countries that joined. However, given that most projects are implemented in developing countries, with limited access to finance and relatively unstable political and macroeconomic situation, it is questionable whether these countries would be able to find other sources of funding. That is also the case with North Macedonia and Montenegro who exhausted all other possibilities to finance their highways before turning to China.

With regard to the 17+1<sup>4</sup> cooperation forum between China, 16 CEE countries and Greece, the 5 WB countries have been eager participants from the very beginning. The cooperation generated not only interest, but also high expectations in the countries that it may help them attract Chinese investments, increase exports to China and have access to the much needed funding for infrastructure projects. Since its launch in 2012 at the Warsaw summit, the initiative has been expanding in scope and in content, with Chinese entities being the primary driver and CEE countries following and accepting what has been proposed. Such an approach poses several caveats to the potential success of the initiative, as well as to the long-term interests of WB countries.

First, there is no ownership over the initiative by the WB countries. Most of the time they acquiesce to the Chinese proposals in order not to offend China as their valuable partner. But, when they come to realize that in many cases they do not have much concrete benefit or that they need to spend national funds to make the cooperation work - they become less enthusiastic and even disengaged. One example would be the opening of a number of topical hubs in each CEE country (e.g. cultural cooperation in North Macedonia, transport and infrastructure in Serbia, etc.) which failed to achieve significant visibility outside the national institutions that host them, to effectively promote the potential benefits from the 17+1 cooperation in their respective areas and to engage all the countries in the CEE region that they are supposed to represent.

Second, this puts into question the multilateral character of the initiative. Participating CEE countries only contemplate their own interests and do not perceive themselves as being part of the broader CEE region. This is engraved in the reality that different sub-regions, like the WB, V4 or the Baltics, have seldom worked together in the spirit of regional cooperation and are not used to seek for common solutions to common problems. They act in the spirit of competition and not cooperation, at the risk of engaging in a race to the bottom and missing on the opportunity to create a joint regional platform to offset the asymmetry between themselves and China.



Third, the asymmetry which stems mostly from the size of their countries and economies is further worsened by the resources invested by the CEE governments in order to make best possible use of the cooperation, leading to knowledge asymmetry. China is pooling extensive knowledge on the all the countries in the cooperation, even the smallest ones with an astonishing level of detail<sup>5</sup>. It has been training and using language professionals and Balkan experts, engaging its diplomatic network, Confucius Institutes and think tanks to gather important insights that will shape its policies and objectives. On the other hand, North Macedonia, like the other WB countries with the exception of Serbia, has very limited understanding of China in general – its objectives, opportunities, politics and policies – and has not made any specific steps to remedy to that situation. The lack of expertise and strategy is making it impossible for Macedonian policy makers to make informed decisions, to become more proactive in the cooperation and to maximize their interests.

Nonetheless, the 17+1 initiative is useful for the WB countries because it establishes permanent and regular forum for them to engage with China. Previously, with the exception of Serbia who has established comprehensive strategic partnership, the other countries had seldom the chance to be seated at the same table with China. In addition, the loose institutional structure of the 17+1 platform and its evolving nature leave a lot of space for the WB countries to fill in with content according to their priorities, should they wish to do so. Thus far, their level of engagement and ambition in the 17+1 has varied, as illustrated by the ranking done by Oehler-Sincai on the basis of events announced and hosted in the periods 2013-2015 and 2016-2018 respectively (Oehler-Sincai, 2018). North Macedonia was ranked 8<sup>th</sup>, classified as an “ambitious” country in the first period, then dropped to the 13<sup>th</sup> place in the category of “followers”. To compare, the other WB countries also changed their rankings: Serbia dropped from the 2<sup>nd</sup> to the 4<sup>th</sup> place, Albania from the 14<sup>th</sup> to the 16<sup>th</sup>, while Montenegro and Bosnia and Herzegovina climbed from the 16<sup>th</sup> to the 11<sup>th</sup> and from the 15<sup>th</sup> to the 6<sup>th</sup> place respectively.

Coincidentally or not, the drop in the ranking follows the wiretapping scandal that revealed allegations of corruption and abuse of power by high ranking Macedonian government officials. Namely, one of the cases brought to court by the Special Prosecution Office was related to the construction of the two highways with Chinese funds by the Chinese SOE Sinohydro (Special Prosecutor's Office, 2017). It was supposed to be one of the flagship projects of the 17+1 initiative both for its size and for the fact that it was the first one contracted by a participating country with funds from the credit line of US\$ 10bn made available by China in the framework of the cooperation. Instead, it tarnished the reputation of the Chinese engagement in the CEE region and has acted as deterrent for the Macedonian government to envisage similar types of cooperation with China in near future<sup>6</sup>. Furthermore, the scandal seems to have poured a “cold shower” to the Macedonian high-level engagement in 17+1 and no significant initiatives have been proposed by the Macedonian side at the last three 17+1 annual summits (2017, 2018 and 2019).

### North Macedonia between the EU and China

Some observers have regarded the launch of the 17+1 initiative as an attempt to further undermine the unity of the already divided EU vis-à-vis China (Godement, Vasselier, 2017). They deem that, given the already established mechanisms between China and the EU institutions, no additional forum is needed for the cooperation with China. However, this perspective omits the fact that WB countries are still not EU member states and that their specific interests are not voiced at EU meetings, neither does it reflect the fact that EU member states in CEE account for only a tiny part of the Chinese investments in the EU (1.5% in 2018, declined from 3% in 2017), while the lion's share goes to the Western European countries and especially the three biggest economies, Germany, France and the UK (Hanemann et al, 2019:11).

The WB countries receive even less Chinese investments: less than 3% of the overall investments in CEE in 2016 (Liu, 2016). Furthermore, they are not eligible for the EU's structural funds, which creates more constraints for their governments when it

comes to securing funds for infrastructure and growth, thus often leaving China the only alternative. Meanwhile, China has been trying to portray itself as a credible and responsible partner for the EU, which is its biggest market, especially since the beginning of the US trade war on China, which seriously affected the Chinese economy. Hence, since the 2018 China-CEE Summit in Sofia, the joint documents – 17+1 Cooperation Guidelines contain references to the fact that the 17+1 cooperation should be complementary to relevant EU's policies and projects, respect EU regulations and standards, and be in line with the EU-China comprehensive strategic partnership, the EU-China 2020 Agenda, the Investment Plan for Europe and the Trans-European Transport Network (Sofia Guidelines, 2018).

In addition, there are several reasons why China needs the WB region to be on its path towards joining the EU. First, none of the countries, with the exception of Serbia, is large enough to be very significant in China's foreign policy. Jointly including them in the 17+1, as would their future integration into the EU, saves China resources and energy, so that it does not need to deal with the countries individually and comprehend different legislations, standards and ways of doing business.

Second, the process of the countries' alignment with EU standards is not likely to deter Chinese companies, but rather represent an incentive to learn. Having successfully implemented projects according to EU standards in the WB region is a good reference when bidding for contracts in the much bigger EU market. For example, the successful bid for the Pelješac bridge which is being built by the Chinese SOE Road and Bridge Corporation with EU structural funds, would probably not have been possible without the company's previous experience in construction projects in the WB.

Third, the integration of the region into the EU would mean more stability and prosperity, which is crucial for Chinese investors and for ensuring export markets. Given that China's predominant interests in the region are of economic nature, it sees the WB as a region with relatively untapped economic potential that would further increase if the countries became EU members.

Fourth, China needs friends at the table when documents are being adopted by the EU Council, especially when it comes to the Common Foreign and Security Policy. Experience has shown that countries which have very intensive cooperation with China, such as Hungary or Greece, are crucial in blocking documents that express a critical stance towards China (Euractive, 2016). Therefore, having more allies in fora where decisions have to be taken unanimously would mean less criticism towards China on sensitive issues such as its policies on Xinjiang, Tibet, Hong Kong, Taiwan, the South China Sea, etc.

Therefore, China's cooperation with North Macedonia *per se* is neither intended nor likely to alienate the country from its EU accession, since its influence is, for the time being, limited to the economic sector. In that regard, North Macedonia, Montenegro and Albania are different from Serbia, where China's economic influence has already spilled over into a political debate. However, in order for North Macedonia to maximise its benefits from the cooperation, two preconditions have to be fulfilled: First, the cooperation should adhere to the spirit of EU values and be implemented according to EU legislation and standards, so that it can be synergetic with the EU accession process, which is an overarching national strategic interest, and thus refute all suspicion about a hidden agenda. Second, the country's needs should be taken into account, and the current mismatch concerning what China has to offer should be overcome. Only counting on loans for infrastructure funding as the core of the cooperation is neither sustainable nor mutually beneficial.

*Image source: dreamstime.com*



## Conclusions and recommendations

China does not seem to have a pre-defined strategy for the WB, nor for the broader CEE region. Its engagement is shaped “on the go” and seeks to leverage different opportunities as they present themselves. The same can be said about North Macedonia and most WB countries, which are willing to cooperate with China, but, at the same time, do not have a clear idea how to use the cooperation to their benefit. The resource and knowledge asymmetry further exacerbates the problem for the WB countries, which (with the exception of Serbia) fail to maximise their interests both in the bilateral cooperation and in the framework of the BRI and 17+1. Therefore, North Macedonia should start developing an appropriate China policy in the nearest future, in order to define its priorities concerning bilateral cooperation, the BRI, and 17+1. Specific objectives need to be devised on the basis of a solid understanding of China's actions, interests, and what it can offer, as well as concrete steps towards achieving those objectives. Considering the lack of adequate human resources in the state institutions, this approach should include expertise from the civil society and academia.

Given that WB countries are small and relatively unknown to the average Chinese, regional cooperation between them would be beneficial for overcoming the asymmetry vis-à-vis China. In that context, the Regional Cooperation Council could help to formulate a joint regional offer in the area of tourism and investments to be presented to the Chinese, in order to make the WB as a whole more attractive for Chinese tourists and investors. This approach would also reduce the incentives for competition and race to the bottom that are not

uncommon for the WB countries when it comes to catering to their own interests only.

The EU accession process is another constraint to the Sino-Macedonian cooperation because both sides have thus far been struggling to frame and formulate their joint projects according to the EU's requirements for candidate countries. Nonetheless, it is not China's ambition nor interest to present itself as an alternative to EU membership. To the contrary, a well developed EU-China cooperation in the WB could be beneficial to all three parties. Hence, China and the EU should engage in discussions on how to cooperate in the WB and, by doing so, contribute to the region's enhanced development. Their approaches can be complementary in a number of areas. For instance, most transport infrastructure projects that China is interested to finance in the WB are in line with the EU's Trans-European Transport Network; the 17+1 platform offers funding for green energy projects which could be used to reduce the region's energy dependence in line with EU's standards; China could provide development assistance to build the much needed social infrastructure which is included in the national Single Project Pipelines, but not a priority for EU funding, etc. In that context, the Western Balkans Investment Framework could reach out to China as a financier, and China could initiate reflections and talks on how to make its projects compliant with EU norms and regulations in terms of technical standards, as well as environmental, social and financial sustainability. Next year's EU-China summit in Leipzig during the German EU presidency could also be an occasion to invite WB countries to a joint meeting and strategic discussion on these issues.

1 According to some scholars (Przychodniak, Lin, and others), the increased involvement of the Chinese Communist Party in the governing boards of a number of privately owned corporations makes it difficult to delineate the party-state control over private capital flows.

2 This paragraph refers to information exchanged at the expert workshop *Corporate China in the Balkans* held in Tirana in May, 2019. Special gratitude to Ardian Hackaj, Milun Trifunac and Momcilo Radulović.

3 Kosovo is not recognized by PR China nor included in the BRI and 17+1, hence it will not be addressed here.

4 The 17+1 cooperation platform, which was 16+1 at the beginning, includes China, 11 EU member states – Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia, the 5 WB states – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia, and starting from 2019 – Greece.

5 See for example the section on Macedonia in the Foreign Direct Investment catalogue published in 2011 <http://images.mofcom.gov.cn/hzs/201309/20130923082710756.pdf>

6 Author's private interview with a high-level official from the Ministry for Transport and Communications. September 2019.



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