

'Getting on the Radar': China's Rising Media Presence in South East Europe

by Vladimir Shopov



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I. Introduction

In just over a decade, China has managed to enter the region of South East Europe (SEE) and is well on its way to consolidating an expanding presence across a widening range of areas in economy, politics, society and culture. This process has occurred in times of persistent geopolitical ambivalence in the countries of the Western Balkans even as gradual integration into NATO has gathered pace.¹ While most analysts date the push to manoeuvre into the peninsula to the structuring of policies and formats such as the 'Belt and Road Initiative' (BRI) and the '17 plus 1' cooperation framework, Beijing's initial forays may be placed in the context of its post-2008 global crisis response of multi-level internationalization. The formalization of this approach in 2013 provided structure, direction and visibility, while high-profile, spectacular gestures and investments into infrastructure and energy served to highlight the arrival of an emerging global power and to function as effective points of entry into the economies and polities of the region. However, this focus on large-scale projects and the return of the discourse of geopolitical competition has hampered in-depth analysis of actual Chinese activities on the ground in SEE. These increasingly reveal an expansive, multi-level approach to the Western Balkans and beyond, marked by ever more extensive efforts and initiatives to embed the country's presence in the various areas of economic, political and social life. Moreover, in parallel to its prominent large-scale moves and investments of entry, Beijing is implementing a very granular strategy of developing and cultivating relationships with individuals and institutions.² Further, the increasing footprint of the country carries a self-reinforcing dynamic of engagement and entanglement which necessitates the elaboration and implementation of strategies of public presence and diplomacy. From this perspective, important issues of the country's public posture and 'soft power' have hitherto been overlooked, even though this is beginning to be corrected.³ Given these tendencies and dynamics, mapping and understanding China's media presence and engagement is of increasing importance and will provide timely indications and insights into Beijing's overall approach towards the wider region of South East Europe.

The last few years have witnessed wider and significant transformations in China's foreign policy and approach to diplomatic engagement which are gradually reverberating throughout its establishment and are increasingly

becoming 'part and parcel' of its international behaviour. The much commented 'hide and bide' strategy is all but gone and is being replaced by a much more expansive and offensive posture, motivated by various factors.⁴ This shift appears to be a combination of endogenous tendencies such as the utilization of existing 'windows of opportunity' to strengthen the regional positions of Beijing, for instance in relation to the South China Sea and its peripheries. This is complemented by the choice of response to a series of exogenous processes and events which have undermined the country's global standing. These include structural tensions with the US, the increasingly ambivalent attitude of Europe, the handling and aftermath of COVID-19 and its forceful 'mask diplomacy', policies towards 5G and Huawei, etc. Further, there have been numerous negative international reactions towards Beijing's actions in Hong Kong, Xinjiang and Taiwan, bringing an end to the prevailing reluctance to respond to the country's disposition. The change of posture and language towards some key EU member states during the current pandemic is quite striking and bound to leave lasting political impressions.⁵ Beyond Europe, this shift of approach and rhetoric is most obviously illustrated in relation to Australia. The transformation is instrumentalized in a variety of ways, most aptly captured by the already well-established reference to 'wolf warrior' diplomacy being implemented over the course of the last few years.⁶ Notably, social media presence has been one of its main platforms, while the spokespersons of the Chinese Ministry of Foreign Affairs and the country's ambassadors have been its key actors. In the longer term, the various elements of the media environment will remain the crucial conduits for this policy, logically shifting the focus of analysis of Beijing's behaviour. Moreover, this 'ultimatum diplomacy' has been much more extensive than many politicians and analysts have noted, raising serious concerns about its evolution.⁷ In this context, the media and public presence of China assumes a new importance given the rising urgency of acquiring effective instruments which permit its authorities to influence and impact perceptions, narratives and policies. In other words, the country's institutions are operating under an imperative to quickly transform their outward-facing approach and to upgrade their capacity to influence public interaction, engagement and projection of its political and policy goals.

The last couple of years have witnessed a rather dramatic overall shift in the range and use of instruments for media influence at the service of China's increasingly 'sharp power'.⁸ In Europe, this transformation has not received due attention as the predominant political stance until very recently has been one of wide-ranging engagement, often leading to outright refusal to recognise and acknowledge certain realities. For its part, Beijing has been somewhat

restrained in its application of these tools of expansive and increasingly aggressive media penetration and disinformation. Beyond the EU, however, a series of worrying trends have been identified. These include the onset of misinformation campaigns and manipulation of search results on global platforms, co-opting of Chinese diaspora media and suppression of critical coverage, access and acquisition of content outlets, extensive social media efforts to push specific narratives and explicit efforts to present China as a model.⁹ At a lower level of analysis, this posture can be disaggregated into various components and activities. Content delivery is being implemented via investments in digital television, expanding presence on social media platforms and worldwide acquisition of mobile market share. Propaganda is occurring through expansion of state media, cultivating foreign outlets to produce and transmit friendly content, direct purchasing of media organizations and entities and disinformation campaigns. There are also various instruments of censorship. Moreover, these operations require an increasingly elaborate institutional and financial infrastructure which is presently more or less in place and operational.¹⁰ Indeed, the degree of investment and organization in the ecosystem of the Chinese news media remains underappreciated even if most of these activities are domestically oriented. Still, various examples indicate the attention being devoted to the external dimensions of these strategies. For instance, the CRI has built an integrated media production and creation system which brings together ChinaNews, ChinaRadio and ChinaTVApps. This multi-pronged system has produced and supplied written, audio and video content to numerous clients abroad in the UK, Italy, Serbia, Russia and many countries in South East Asia.¹¹ While such elaborate policies may not be immediately obvious or evident in the regional context of SE Europe, there is little doubt that China is well on its way in establishing and operating multi-component media policies and systems. Understandably, these systems are primarily directed at internal and regional contexts. Yet, the expansion of their application beyond these is well under way.



II. Media Presence, Content and Interaction

In order to examine in some detail, the emerging trends of China's public and media presence in the region, this paper begins with a country-by-country approach, outlining and highlighting its key elements.

ALBANIA

Since 2012, there have been indications of rising cooperation between the Albanian Telegraphic Agency and Xinhua News Agency as evidenced by a meeting between the then Chinese Ambassador, Mr. Ye Hao, and the director of the agency, Mr. Artur Zheji.¹² At the end of 2019, the country's state television and radio signed a wide-ranging cooperation agreement with its Chinese counterparts, envisaging exchange of content (including films, documentaries and cartoons) as well as training of staff.¹³ A significant amount of the content is provided free of charge by the Chinese side. The agreement facilitates the broadcasting of documentaries about China's system of governance such as 'China: Time of Xi'. Albania has also been hosting a Chinese TV signal dispersion tower in the village of Maminas, although the tower is expected to be moved to Montenegro. 'Xinhua' have a correspondence bureau in the country but are not particularly active and have an explicit bias towards reporting state-related and official activities. A China Radio International (CRI) FM radio channel was created in 2013. As in other parts of the WB, CGTN broadcasts its various channels in the country. Experts have not identified media outlets with a clear pro-China editorial policy, but a few suggest that there are indications of possible bias on certain portals. There are no indications of Chinese ownership of any of the media outlets or the presence of explicit China bias among current media owners. Still, lack of transparency remains an issue, especially in relation to web-based platforms and news sites.

There has been a notable increase of China-related content, albeit from a very low base. This is most noticeable in relation to BRI-related news items where the growth has been exponential – from 42 in 2016 to 184 in 2019.¹⁴ The overwhelming majority of media content is news reports with just a small number of analytical pieces and interviews. In terms of focus, economic aspects clearly dominate. In terms of tone, the vast majority of news items are neutral,

factual rather than editorializing. There is a prevalence of China-related stories in the public media in comparison to private outlets, possibly as a consequence of the signed cooperation agreements. Content has varied from a few soap operas to documentaries, cartoons and more serious coverage relating to economy and politics. Much of the coverage is related to specific events in bilateral relations or the in wider international context such as the US-China trade war. A great deal of the content is in the form of translated news stories and commentary from major Western media outlets which are then reprinted or reposted in Albania. There have been quite regular interviews with the Chinese ambassador to Albania in English-language newspapers in the country. There is a practice to publish and distribute widely interviews of visiting high-level politicians from China. Regional news about China and its presence have focused on Serbia which receives the overwhelming share of coverage. With the exception of Huawei, Chinese companies do not have significant advertising market presence. COVID - 19 has seen some resurgence of China-related coverage but mostly in the initial stages of the pandemic. Media coverage of support provided by China has been patchy and Albanian politicians and officials have chosen to refrain from organizing high-profile events to showcase Beijing's involvement and cooperation. For instance, medical aid to Albania was accepted at the political level of deputy minister, thereby failing to generate significant media interest. The exchanged letters of support by both sides have received some coverage. The Chinese side has clearly encouraged Albanian students in the country to write and send to the media stories of their experiences of the pandemic and China's response. Moreover, the impact of any attempt by China to implant a certain perception of its cooperation efforts in the pandemic context has been further complicated by coverage of various aid and cooperation projects by the US, the EU and a number of individual countries, for example Greece.

Locally, the Chinese ambassador and the Chinese embassy have been gradually increasing their activities. While there is no particular pattern, the ambassador has been engaging with Albanian journalists through various meetings, informal working breakfasts, etc. He has also been giving interviews a couple of times a year. As part of regular exchange programmes, journalists have travelled on weeks-long study visits, including the directors of the state media organizations. Upon return, they are encouraged to write and publish their memories and observations in the local media, but it is not clear how many actually act on this request. Various contacts insist that such trips fall well short of being effective instruments for creating deep and long-standing working institutional relationships. Even so, they clearly facilitate individual connections

of potential utility. The Chinese embassy is not particularly active on social media. Some contacts report instances of Chinese diplomats using rather aggressive language in informal interactions with local journalists when content disliked by Beijing has been published or content provided by Beijing has been edited.

BOSNIA AND HERZEGOVINA

Due to the fragmented political and community structure of BiH, institutional cooperation regarding media has been difficult. The BiH Journalists' Association functions predominantly as a hub for professional activities, sectoral projects and engagement, training and the promotion of standards rather than as a hub for international cooperation with various media organizations and agencies. In this context, the main interlocutor is Xinhua, which has had a representation office since 2012 and has signed cooperation agreements with the Federal News Agency (FENA) and with Radio and Television of BiH (BHRT), the latter having two separate units – one for the Federation of BiH and one for the Republika Srpska. In general terms, media outlets in all three communities are considered very close to the respective political elites and their independence is considered questionable by many experts. Xinhua also has a cooperation agreement with the Patria News Agency, which is closely aligned with the Party of Democratic Action. Local Xinhua journalists are quite active beyond their immediate professional purview – giving lectures at universities, for instance. The other main actor is the China-focused www.kina-danas.com, based in BiH since 2014. The outlet operates with the assistance of the local Bosnian-Chinese Friendship Association and the Chinese embassy and is intended to function as a regional news hub aimed at wider audiences, exploiting the high degree of mutual comprehensibility between local languages. The content is based on Chinese sources and fully reflects the agenda and points of views of Beijing. Local institutions such as the Foreign Trade Chamber of BiH and the Foreign Investment Promotion Agency of BiH advertise on the site. Various Chinese commercial and institutional entities also support its work: COSCO, the Confucius Institute at Banja Luka University and the Centre for Promotion and Development of the BRI (CPDBRI). Most of the staff at CPDBRI have journalistic backgrounds and its activities have a clear media and publicity focus. The editorial staff of kina-danas.com is very active in the local media community and engages individually on various topics of interest to China. The Chinese embassy in the country organizes study visits for journalists from various media organizations and as a matter of course invites beyond the community

of political reporters. Participants are invited to write positive stories upon their return. In general terms, there is a preference for development and cultivation of relations with individual journalists rather than institutional cooperation. Notably, there has recently been greater focus on cooperation with web – based media outlets.

There is a notable uptick in the presence of China in terms of content. A great deal of the relevant news items is linked to economic projects in the country and these are presented in a very positive light, often in full alignment with the rhetoric of the relevant political community. Various outlets receive content supplied by the Chinese side under 'joint cooperation agreements' which have a financial dimension. Most of these are not directly political and are often defined as 'promotional', relating to tourism, various trade opportunities, etc. Beyond news about local China-related events or projects, relevant media content comes from Western sources but is marginal in presence. There is very little advertising by Chinese companies, and they are quite reserved in communicating with the media, often even declining to respond to queries. The overall low level of investigative journalism additionally stands in the way, securing a rather friendly media environment for Chinese actors. For instance, media outlets have been very reluctant to probe into Chinese involvement in the activities of the main state telecommunications company, which is a key advertiser on the BiH market. Some attempts to investigate have been met with informal threats of discontinuation of advertisement. Opaque ownership and lax regulation further complicate the media environment, especially in relation to web-based outlets, which often even do not publish information about staff, registration, etc. Local experts note an increasing trend of 'planting' of content by third actors (China, Russia and Turkey) in such media.

The Chinese embassy in Sarajevo and its ambassador have very visibly increased their presence in the public sphere. For instance, Mr. Ji Ping has given a series of interviews to a much wider range of media outlets than the traditional format of communication via the more formal state-owned channels. Over the last year, these include talks with the portal klix.ba, Start magazine and the RS news agency, but also an interview for FENA and participation on the Identiteti TV show on BHT. The embassy has also responded very openly and aggressively to the description of Taiwan as a state in some media outlets. In addition, the ambassador is very active in organizing regular meetings and working breakfasts with journalists and policy experts. Social media – mainly Facebook – activity has increased just in the last six months, with embassy accounts as well as the ambassador's personal account

publishing content on a daily basis. COVID-19-related coverage was extensive at the initial stages of the pandemic with the arrival of masks and ventilator equipment, then gradually subsided. Interestingly, there has been a scandal surrounding the ventilators as tenders have fallen through and their use remains in doubt. There are on-going investigations in relation to their import and journalists have been told informally that they could be sued for libel if stories about possible defects are published. Ventilator pricing is also being looked at as part of the official investigations.

BULGARIA

Bulgarian – Chinese institutional cooperation in the field of media is long-standing and quite intensive. The state-owned Bulgarian Telegraph Agency (BTA) has a cooperation agreement with Xinhua, and the Chinese partner is one of its major sources of information alongside Western and Russian news organizations. The agency also distributes the photo content of its Chinese counterpart.¹⁵ BTA have a subscription-based service, which supplies a large amount of foreign policy information and content to most other Bulgarian outlets. Chinese sources hold a prominent position in that context. There are also contractual cooperation relations between Chinese National Radio and Bulgarian National Radio and Chinese Central Television and Bulgarian National Television that go back decades. ¹⁶ For instance, Radio Hristo Botev has its separate cooperation agreement with CRI in the field of art. The main institutional cooperation partner is the Union of Bulgarian Journalists (UBJ), a long-standing organization dating back to the times of the Communist regime. UBJ and the All-China Journalists' Association (ACJA) have had cooperation agreements for over three decades. Both structures have been exchanging delegations for many years now. The last visit by the Chinese side was in March 2019 and included, among others, representatives from ACJA, a deputy editor of China Daily, the head of the online edition of People's Daily and the director of the Hamburg-based Europe Times. The UBJ and its Chinese counterparts organize annual study visits for Bulgarian journalists. On average, these delegations usually include 10 to 15 journalists from major media outlets. Both organizations are currently planning a series of events related to the BRI and various projects under the initiative. Also, at the institutional level, the Bulgarian Council on Electronic Media hosted a visit by their official Chinese counterpart in order to discuss regulatory issues regarding relevant media outlets. The Bulgarian office of Huawei has also been organizing study trips for journalists to the company's headquarters and its various units in Shenzhen.

These have been handled by the commercial office of the relevant media outlets, and the exact terms of these agreements remain unknown. Xinhua has a long-standing presence in Sofia dating back some decades, as does Economic Daily. Over the last decade or so, the journalists of Economic Daily have clearly been more active in comparison to those of Xinhua' developing their own network of contacts, organizing various events, traveling around SEE and assisting in sending local journalists to study visits in China.

In terms of content, *24 Hours* – a major web news portal – has created a segment called *Focus China* whose entire content is about the country. The sources used are Chinese and most of the information presented appears to be unedited and simply translated from the original. The segment uploads a wide range of information, ranging from economic and company news to speeches by President Xi, presented in their entirety. The frequency and density of content is quite impressive and news items are planted in other segments of the web site as well. There are indications that the publisher has signed a financial contract with CRI under this project. Other media outlets have been approached with similar offers over the last few years. Kitajdnes.com is exclusively devoted to China and its approach and content align with the official views and positions of Chinese state institutions. The content of China Today is exclusively supplied by Xinhua and Chinese Radio International. Before the online version, it was published as a supplement to a minor centre-left newspaper. Its publisher, Svetlana Sharenkova, is close to the former Communist party and is a very public and staunch supporter of Russia. The centre-left newspaper Zemja continues to publish a supplement focused on China. There has also been a visible trend of translating and inserting content from Chinese and China-friendly sources. The former includes The China Daily, Xinhua and even the Global Times, known for its more radical and ideologically-laden language and information. The latter include agencies such as the Russian TASS, which itself often carries such content. More and more Bulgarian media outlets are relying on sources of this kind for their China stories– predominantly web portals and news sites, however. Vesti.bg is one such example. Further, various portals are appearing that appear quite friendly to China and that present content and views which align with those of Beijing. One recent example is the web site skafeto.com. There is no public information about its ownership. A Bulgaria-based businessman, Mr. Zheng Zhong, is a regular guest on China-related topics in the main media outlets, mainly in his capacity as the chair of the Council on Economic and Diplomatic Relations. The organization has been very active on issues such as the BRI. Black and White, a little-known print journal, has a permanent section on

China. CRI is now very active on Facebook and publishes numerous stories and news items throughout the day. CGTN and its various channels are available on cable television. The quantity of China-related content is visibly on the rise with most of it still coming from Western sources, but there has also been a notable increase of information coming directly from Chinese or China-friendly sources. It remains largely factual with few analyses and even fewer critical pieces.

Research has not been able to find any evidence of advertising by Chinese companies on the Bulgarian media market. There is no such advertising even on Beijing-friendly web sites such as China Today (www.kitajdnes.com). The only exception is advertising by Huawei, but much of this has been conducted via billboards rather than online ads so far. Notably, there has been a rise in company-related content being published that exhibits a degree of product detail and knowledge clearly suggesting that the actual origin of the information is the company itself but that is passed off as news. There has been an important development relating to possible Chinese influence in terms of ownership: The Central Europe Media Group has been acquired by one of the investment funds of Mr. Petr Kellner, a Czech billionaire. In Bulgaria, he now owns a wide network of media outlets that includes bTV, a major private TV channel. Mr. Kellner is well-known for his China-related business interests, and the editorial policy of these outlets will be scrutinized for any shifts in its approach towards Chinese issues.

Interviewees agree that the Chinese Embassy in Sofia is still comparatively reluctant to engage with local media outlets and is often unresponsive to requests for information. It appears that its behaviour varies depending on the editorial policy and the degree of familiarity with the individual journalists. However, all interviewees agree that there has been a notable uptick in overall engagement. Some outlets report being contacted by the embassy with a request to respond when disagreeable positions have been published. The social media presence of the Chinese embassy and CRI is visibly on the rise as content is continuously published. Moreover, there is a notable increase in interest in cooperation by various Chinese interlocutors in the media sphere. Local diplomats follow up with journalists who have participated in study visits to China, – study visits arranged with an expectation that participants will eventually produce content reflecting their experiences and impressions. There are indications that individual journalists from various media outlets have been approached for consultancy, research and production of content on a freelance basis. There has not been significant coverage on COVID-19-related bilateral cooperation.

CROATIA

Formal institutional cooperation between Croatian and Chinese media organizations appears to be quite thin. There are no indications of any particular extensive cooperation agreements between the Croatian News Agency (HINA) and Chinese counterparts such as Xinhua. The Croatian Journalists' Association has been in existence since 1910 but is mostly focused on issues such as creating and upholding a code of ethics, legal and regulatory matters, investigative journalism, professional and labour law issues, etc. There are no indications of structured cooperative arrangements with the All-China Journalists' Association. Xinhua does not have a permanently posted journalist in Zagreb. The country is covered from Ljubljana, Slovenia by means of occasional trips for meetings and events. Overall, development of institutional relations has not really been a priority. The main platform for cooperation are annual study visits for Croatian journalists, the usual number of participants being about 6 to 8 people. These traditionally last a couple of weeks and include trips around the country, meetings at various state institutions but also visits at numerous companies such as Huawei, Ali Baba and Haier. Upon return, participants are approached and invited to write stories about their travels. Commercial TV stations and various portals and websites have expressed greater interest in China-related topics and appear to be more inclined to engage with relevant actors. Contacts confirm that no Croatian media outlet has its own correspondent in China, further complicating reporting and analysis of events and processes in the country.

Media content relating to China is visibly increasing and is currently mostly linked to individual projects such as the construction of the Peljesac Bridge. Reports on these projects are predominantly positive, while the rest of the coverage is quite factual and, in this sense, neutral. At the same time, there are very few analytical pieces on the country as Croatian media lack sufficient interest and capacity to engage at this level. Some outlets have been quite open to publishing content provided by the Chinese embassy. More articles are being published on the China-US conflict and its various aspects, but these are mainly translated from Western media organizations. There are occasional media interviews with the Chinese ambassador in Zagreb. Interest towards China among the wider public is still quite low, thereby creating little commercial incentive to provide such content. There are indications that some Croatian media outlets are cooperating with the Chinese South East European Business Association (CSEBA) and are benefiting financially. This multi-purpose structure has a de facto lobbying function as well and is interacting with a variety of

public and private institutions in the country. Its members and associates include various organizations connected to the 'Silk and Road' initiative but also the international department of the central committee of the CPC. Media representation for official Chinese policy is among CSEBA's the explicitly stated objectives. There is little advertising by Chinese companies in Croatia. Huawei is an obvious exception with extensive campaigns advertising its range of products. A few years ago, there have been a number of commercials advertising China-produced SUVs that did, however, not make much of an impact. The popular biweekly magazine Globus has a supplement entitled China in Croatia that contains detailed information about various commercial and other activities on the part of Chinese entities. A few trips by Chinese journalists have already taken place, some on the back of various political events and some as independent undertakings. The Chinese visitors' interest was predominantly focused on tourism and ecology. As in many other countries in the region, ownership transparency remains a serious issue. In the case of web-based media, there is often a complete lack of information, while in other cases the actual owners are considered fronts. There are unconfirmed reports that a Chinese company has made an attempt to acquire the biggest media group in the country, Hanza Media, but has been unsuccessful on this occasion. Furthermore, sources suggest that another Chinese entity is currently interested in acquiring a number of radio stations around the country.

The local embassy is not among the most active in the region, seemingly engaging with the media in a rather traditional manner – sending official statements, organizing interviews with the ambassador, etc. There is usually an uptick in activity surrounding official visits and particular events. Contacts report a lull in overall interaction between the ambassador and local journalists. The embassy is not particularly active on social media, but there has been an uptick in this respect. COVID-19-related content was limited to reporting on the delivery of masks and equipment from China in the early stages of the pandemic. In the later stages, the media focus quickly shifted to support and donations from other countries and organizations and on the course of the pandemic in Europe and across the world.

KOSOVO

The non-recognition of Kosovo's independence by China and the support for the territorial integrity of Serbia determine the overall political context of the bilateral relationship between the two countries. This has created a

situation of extremely limited space for interaction, further impacted by the enormous institutional and financial degree of Western commitment to the rebuilding of the country. This context leaves few opportunities for the Chinese, who remain focused on the preservation and development of relations with Belgrade. Nevertheless, Beijing's liaison office in Pristina maintains informal communication with Kosovo's authorities and there is implicit agreement that the latter will not recognize Taiwan as an independent state. China is not perceived as a 'hard non-recognizer', mostly content to leave this issue to Russia, thereby creating a certain pool of goodwill in Kosovo. Further, the liaison office is slowly increasing its activities even if its presence is still quite unnoticeable. The Chinese embassy in Tirana, Albania has been strengthened to improve its diplomatic and analytical capacity vis-a-vis Kosovo. Trade and tourism relations are picking up and Chinese companies have expressed interest in participating in some energy projects. Kosovo Telecom recently received a Chinese loan offer in exchange for 5G equipment at competitive prices but declined.

As one would expect given these circumstances, the presence of China in the country's media is very thin. Still, there are news items on a number of subject matters. One is the lingering issue of Kosovo's recognition by Beijing. The UN mission to the country receives continuous coverage. There are some analytical pieces on this topic, the general expectation being that China would abstain from interfering. Secondly, there are 'spill-over' stories about Serbian-Chinese relations that have both relevance for Kosovo and wider regional importance. Thirdly, a few items about the Serb-populated parts of the country have made the news that have discussed the China-related aspect. Fourthly, there are occasional government statements on various aspects of the recognition issue that involve Beijing. These are being reported on in the main outlets. Finally, China is at times in the main international news, mostly in the context of its relations with the US. The country has not received any medical assistance from Beijing in the context of COVID-19. Accordingly, there has been no relevant media coverage.

MONTENEGRO

The media presence of China is gradually increasing even if the modes and channels of this trend remain rather complex and ambiguous. This increase is expected to continue. The Montenegro state media do not have formal cooperation agreements with their Chinese counterparts. Events in the

country are reported by the regional office of Xinhua in Belgrade, and some of its journalists travel on occasion and during various significant events. The main Montenegrin state media do not have correspondents in China, further complicating reporting and analysis. However, Chinese media outlets regularly offer free content, which is perceived to be of relatively low quality by many journalists in Podgorica. While the most respectable and financially viable local outlets rarely resort to publishing such content, many of the less stable web-based media are known to have carried stories and news items supplied by the Chinese side from time to time. There is still not much genuine interest generated by the local media on matters relating to the 'middle kingdom' and coverage is heavily skewed towards economic news and is linked to specific events. The few analytical pieces that do get published are translated from Western sources and generally relate to the wider context of US-China relations, the economic rise of the country, etc. Local experts believe that local reporting on China is gradually but steadily getting friendlier in terms of both angle and tone. In terms of content, there is a steady flow of content on such issues from Serbia through various media channels. This material too is predominantly positive, non-analytical and uncritical. There are no reports of any material assistance to media outlets by the Chinese side or any direct purchase of media space.

The Chinese embassy in Podgorica is the main linkage node in relations with journalists and local media outlets. The embassy regularly organizes study visits for local journalists to the country. These visits last a couple of weeks, and participants are expected – and reminded – to write and publish their observations and experiences. Chinese diplomats have responded to news stories about Taiwan published in the local media, informally voicing their views and, on occasion, expressing their disagreement. Generally speaking, the embassy has not been particularly active in its interaction with local journalists. For instance, diplomats do not regularly meet with journalists, and there are no regular events involving the ambassador such as working breakfasts, informal chats, or the like. The embassy's preference is to keep a low profile. The embassy issues press briefs on occasion, but these are often quite badly translated, stale and of little immediate use. There are indications of some media involvement by the main Chinese company operating in the country, the China Road and Bridge Corporation. The company has helped finance trips for journalists to China, with the clear expectation of positive coverage later on. There is little open advertising on the part of the company beyond this activity.

COVID-19 coverage relating to China's involvement and assistance is reported to have been patchy and limited to a span of a couple of days. While Beijing's assistance has been covered by the media, its extent has been limited both by the sheer speed of events, by concern, and subsequently by the substantial help received by Montenegro from various other directions – the EU, the US, Turkey, Russia, NATO and the Central European Initiative. Some media outlets carried stories of medical assistance from various individuals such as Mr. Jack Ma and Mr. Petros Stathis. As in other countries in the region, while the president publicly expressed official gratitude towards China, there were no significant high-profile occasions to help solidify a certain positive perception of the 'middle kingdom'. However, at least two processes seem to be at work when it comes to coverage of China in the Montenegrin media. One is the overall pro-government stance of most outlets – either because they are owned by the state directly or because they are owned by companies and individuals close to the governing party and its networks. This has ensured continuous positive coverage of bilateral relations and, importantly, has resulted in very few critical stories about issues such as the fiscal and economic impact of the loan to build the Bar-Boljare motorway, lack of public procurement, parameters of the contracts, transparency, environmental impact, etc. In many instances, the motorway has been described as 'the project of the century'. There is a distinct lack of investigative journalism on these matters and very little coverage of environmentalist protests in response to the actual building of the highway. Secondly, transparency remains an issue. This is illustrated by the implicit media involvement and ownership of Mr. Petros Stathis. A bank controlled by Mr. Stathis is among the main advertisers in the country and has been linked to various Chinese and other Asian business interests. In addition, many of the smaller web-based media outlets clearly lack viable business models and are subsidized by their formal or informal owners. Experts insist that paid content is a regular feature across many of these platforms.

NORTH MACEDONIA

There are long-standing institutional relations between the Macedonian Agency for Information (MIA), established in 1997, and its Chinese partners. In 2004, the MIA signed a cooperation agreement with the deputy minister of the state administration of radio, film and television, Mr. Tian Jin, detailing various opportunities for exchange, content sharing, study visits, etc. This framework is now fully active and of steadily growing importance. MIA also has a cooperation agreement with Xinhua, among other international agencies. Lately, the

Chinese side has been offering material support to the agency in the aftermath of a fire that ravaged the agency's office building . Bilateral media relations go back quite a few years. In 1995, the deputy editor-in-chief of Sichuan Daily led a delegation of journalists to Skopje. In 1996, the deputy editor-in-chief of Qiushi Magazine also travelled to the country. In 2004, a delegation of Macedonian journalists visited China, while five years later a delegation by the All-China Journalists' Association returned the gesture. For most of these projects and exchanges, the local partner has been the local association of journalists, originally established in 1946. Over the last few years, the association has been approached a few times by its Chinese counterparts with offers of intensified cooperation, financial support, content, etc., but the North Macedonian side has declined to deepen these ties. Until 2015 or 2016, it sent representatives to events organized by their Chinese counterparts, but this has been discontinued for various reasons, one of them being the overtly political nature of much of the programme. Earlier, delegations of up to 15 local journalists had participated in these trips. A number of members of the local association have continued to insist on deeper ties with China. Participants in these study visits have been repeatedly approached by local Chinese diplomats with requests for publication of content provided by them and for writing positive stories about their experiences in China. The wider framework of '17 plus 1' is also being utilized to advance bilateral cooperation with journalists and media outlets. For instance, in 2014, the CEEC and China exchanged journalists' delegations. This was followed by another visit, in 2015, to various provinces of the 'middle kingdom'. Visits such as these are now a regular occurrence. 2017 was an important year of media cooperation within this framework. The line of cooperation is being further developed in parallel with other sectoral platforms of '17 plus 1'.

China-related content is growing in prominence, whilst still remaining peripheral overall in the media environment. Most news items are about the economy, relate to ongoing or potential bilateral projects and remain factual, with very few analytical pieces discussing the wider aspects and in depth the bilateral relationship. Many stories are translated versions of content from bigger, predominantly Western news agencies. The impression is of a prevailing negative angle, but deeper research is clearly required to map this out. Some content sponsored by the Chinese side finds its way to various outlets. A few op-eds have been published, as well as interviews with the Chinese ambassador. Smaller, private outlets have shown greater readiness to carry China-related news stories. The embassy has been instrumental in organizing study visits by journalists, which have often lasted up to a month

and have involved an extensive institutional and travel itinerary. High-ranking officials from state and radio media structures have been subjects of particular attention. In general terms, the local embassy is quite active in its relations with journalists. There are occasional meetings with some of the diplomats and semi-annual working breakfasts with the ambassador. Some local journalists have been approached with requests to write stories on issues such as the situation in Hong Kong and in relation to COVID-19. While the embassy's focus has been on traditional media, there has been a notable push into social media. The ambassador and the embassy have Facebook and Twitter accounts. Notably, individual diplomats from the embassy have created their own personal accounts and are quite aggressively posting critical and anti-Western content on various matters, ranging from the response to the pandemic to issues such as Hong Kong, Xinjiang, etc. Xinhua has a correspondent in Skopje. There are no indications of Chinese involvement in the ownership structure of North Macedonian media outlets. Advertising by Chinese entities is not extensive, with some of it being bought by Huawei. The COVID-19 pandemic and China's cooperation efforts have led to an uptick in engagement with the media, predominantly via the local embassy. The embassy has been reposting official content on its media channels and there has been a flow of content of this type being sent to various journalists. There were some news stories about Chinese assistance in the early days of the pandemic, but their impact does not appear to have been significant, as other countries and organizations began to send various types of financial and material aid to North Macedonia as well. Notably, pro-China stories have been more prevalent in web portals.

SERBIA

Recent intensified media cooperation at the institutional level began in 2016, when a cooperation agreement was signed between China's State Council Information Office and the Serbian Ministry of Culture. The agreement was reached during President Xi's trip to Belgrade and envisions various types of exchange and information sharing. Notably, a special China-Serbia media dialogue was organized on this occasion, ensuring participation from all main media outlets in the country. In 2017, the China Economic Information Service, an affiliate of Xinhua, established a 'Silk Road of financial information' and concluded agreements for cooperation with various media organizations from around the world, including Serbia's *Tanjug* News Agency. This framework complements Xinhua's 'Silk Road Platform', which was set up in 2015. The well-established National Association of Journalists also has cooperation

arrangements with various Chinese counterparts. The structure has been organizing study visits for journalists with an emphasis on big media organizations, perceived to be close to the government. The Chinese State Council Information Office has a representative in Belgrade, as does Xinhua, even though it is not perceived as among the most active and visible agencies in town. CRI is also broadcasting locally through its web-based service. CGTN channels are readily available via cable TV operators.

China-related content in the Serbian media has increased significantly in the last few years as a consequence of bilateral cooperation becoming both deeper and more active, and of the government's keenness to present these activities in a positive light. The content is overwhelmingly positive and friendly, contains a great deal of detail and is often laden with more or less overt affirmations of friendship. For instance, all projects are presented as investments while in most cases they are being funded via loans. Information activities are focused on bigger media outlets. Much of the content is considered direct promotion by many and is thought of as controlled by the government. The weekly news magazine *Nedeljnik* has a supplement on China but has had similar supplements with Western media organizations such as the New York Times. The daily *Politika* also regularly has China-related information which is overwhelmingly positive. More critical outlets include *N1* and *Danas*. Critical information about the activities of Chinese companies trickles into smaller local outlets at times, but the stories never really make the national media, which limits widespread awareness of such views. There is little in the way of advertising, with the exception of Huawei. Contacts report that Chinese companies refrain from communicating with the media and prefer to keep to themselves, leaving most of the communication to the relevant state authorities. As in other countries in the region, media ownership transparency remains an issue, particularly when it comes to web-based platforms and sites. The overwhelming perception is one of proximity to the government, clearly reflected in terms of editorial policy, content, an absence of criticism of officialdom, and informal communication with various state institutions. The much-discussed recent billboard posters of President Xi were paid by the *Informer*, a newspaper.

The embassy is not seen as very open to journalists, with communication happening mainly via press releases and official statements. The ambassador gives regular interviews. As many experts quip, most of their communications work is being done by the Serbian state itself. A great deal of detailed information about Chinese activities and projects is actually issued by the relevant Serbian sectoral institutions. It appears as though critical outlets

are visibly kept at a distance. Embassy staff closely monitor media content about China and often respond informally by talking to outlets or by releasing 'counter information' to address certain criticisms – for instance, in relation to environmental concerns regarding Smederovo and Bor. The social media presence of the embassy is also slowly picking up as the ambassador has created a Twitter account, which is gradually gaining followers. There also is a Facebook page promoting the BRI, but it has yet to be fully developed. Notably, the Serbian embassy in China has opened a Weibo account, which has published content and photos illustrating Serbia's gratitude for COVID-19-related assistance. The account has over a million fans and a Beijing-based organization, the New Sunshine Charity Foundation, has requested permission to raise donations for the Serbian embassy in relation to the pandemic. There has been a very high-profile media campaign in support of China's activities in relation to tackling COVID-19. It involved a memorable video of President Vucic kissing the Chinese flag and billboards proclaiming 'Thank you, brother Xi' across Belgrade. While initial cooperation activities received extremely prominent media coverage, the fanfare was dialled down significantly when official Belgrade was surprised by the negative international reaction. Stories about the bilateral cooperation between the two counties on tackling the virus continue to be published in various media outlets, but their tone is noticeably more reserved now.

III. Wider Trends

The extensive field work conducted under this project allows observation and analysis across a variety of aspects of the media environment in SEE, both in relation to China and more widely. Some of these observations are about the current state of affairs. Others are about the possible future trajectory, pointing to emerging trends and directions of travel for the coming years.

FRAMING INTERACTION

China is gradually establishing a framework for media interaction and cooperation with various bilateral and multilateral components. At the formal bilateral level, this is being done through agreements with major state and private media institutions as well as with journalists' professional association. Professional study visits are now a well-established mechanism even if their utility is questioned by some. These cooperation relationships are being strengthened through state channels and increasingly through private channels as well. The range of counterparts is expanding – from state news agencies to non-state professional structures and various types of private media outlets. There are indications of another, less hands-on level of engagement of the presence of intermediary actors whose work is much less apparent and still to be fully evaluated. Further research is needed on this topic. One such structure, for instance, is the Chinese Southeast European Business Association (CSEBA), which has a PR function and has been working with some media organizations to ensure representation, provide content and support friendly publicity efforts. This intermediary level functions at the interface between media outlets, PR and advertising agencies and lobbying structures. Importantly, much interaction is occurring at the individual level – various journalists, columnists and other people generating content are being contacted by and engage professionally with various Chinese institutions. Journalists in particular outlets are freelancing on specific issues or are working on research projects in an individual capacity. China-supported BRI institutes are establishing relationships with individual media people through participation in conferences, projects, visits, etc.

China has also been extending its multilateral institutional framework, through which it hopes to structure and manage its engagement with media outlets,



across the globe. The Belt and Road News Network (BRNN) was established back in 2017 with an explicit mandate 'to tell the stories about the BRI in a way that could shape healthy public opinion'.¹⁷ Its council is managed by the Chinese *People's Daily* and is involved in exchanges of news products, media personnel and technology. It also organizes joint reporting trips, awards the Silk Road International News award, creates databases and archives, etc. As of April 2019, the network has 208 media members from 98 countries. Other structures are being created at pace. In September 2019, the Belt and Road Journalists' Network was established at the joint initiative of the All-China Journalists' Association and of journalist associations from various countries participating in the BRI. Its chief aim is to intensify exchange and cooperation among journalists belonging to the various country associations. The first presidium members are from China, Russia, Kazakhstan, Indonesia, Argentina and Nigeria.¹⁸ 60 organizations from 50 different countries were present at the founding forum.

At a more conceptual level, interaction with local actors and institutions in the public sphere may presently be understood through an emerging 'constituency of interest'. In general terms, this constituency of individuals and institutions could be conceived as having three pillars with very different histories and dynamics. One consists of the legacy community and networks which embody prior relationships and frameworks, often dating back decades. In some cases, these are based on cooperation and memories from communist times, in others they simply rely on centre-left-leaning individuals or structures. While ideological affinity is often a factor in this interaction, much of the time it is quite transactional. The second pillar is institutional interaction and access ensured via various state-to-state and state-private relations. These relations are created through the myriad of opportunities supplied by bilateral and BRI cooperation mechanisms and projects and involve information agencies, various departments in ministries, professional organizations, state and private media outlets, etc. The third pillar is an emerging and rather fluid network of new actors who perform a variety of different functions. They range from returning students with a claim to China-related expertise and freelancing opportunity-takers to people from the local Chinese diaspora to owners and managers of various private media outlets keen to survive in an increasingly tight media and advertising market.

The modes of engagement on the media terrain by China, as we have seen, have been expanding in both intensity and variety. The mixture of bilateral and multilateral frameworks and their cross-utilization is now evident and expected

to continue. However, this research reveals another dynamic worthy of discussion and of further mapping and analysis. It indicates an uneven rhythm and seemingly sudden upticks of engagement, spurts of activity that seeks to make quick advances in terms of presence and potential influence. One stark example - although unconfirmed - is China signalling interesting in acquiring the Hanza Group in Croatia, suggesting an attempt to upgrade Chinese engagement swiftly. In more conceptual terms, such steps mark an emerging trend of a transition from presence to embedding to leverage, allowing Beijing to assume a position of structural power rather than remain a player at other sub-optimal levels, with greater focus on lower-tier interaction involving creation and cultivation of relationships, generation and placement of content, attempts to structure and implant narratives, etc. Even if this particular attempt is ultimately unsuccessful, it is a sign of the presence and parameters of China's longer-term approach. Moreover, this survey reveals other similar initiatives which suggest the aforementioned spurts of activity. In the case of Bulgaria, the Chinese side has made a transition towards direct planting and insertion of Chinese-produced content in a major media outlet with a popular printed paper and with *24 Hours*, a web-based news platform. The rubric *Focus China* features prominently and its content is completely unedited, rote translation of official Chinese sources.

EXPANDING CONTENT

Media content about China is gaining volume and impact across SEE. The trend appears to be a sustained trend with a variety of factors behind it. Admittedly, the country is starting from a low baseline as its entry into the region has occurred only over the last decade or so and is just gathering momentum. While the increase is not particularly impressive in terms of quality, the dynamic behind it is noteworthy and indicates the gradual emergence of a wide-ranging and sustained strategic effort. There is not only more information and content about China, but it is found across a wider range of media segments and outlets as well. These range from state-run media that are content suppliers within their national media systems to printed newspapers and digital, web-based outlets, portals and social media. More China-related content is visible in national and all-encompassing outlets to more sectoral ones, even in life-style publications. The range and topics of information are also expanding even if economic and business content still predominates. Political and cultural content is visibly on the increase with a life-style angle also emerging, visibly attempting to expand audiences and reach beyond those



tempted by international news. The predominant type of content is factual, with very few analytical pieces in the mix. Moreover, these mostly refer to China's role and place in international affairs, rather than to the respective bilateral contexts and relations. Most of the content is either neutral or positive, with few reports or comments being critical. The visible uptick is due to a variety of reasons. One is the increase in cooperation between China and the countries of the region over the last decade, providing a greater number of occasions and reference points for public attention. Secondly, national governments have been keen to push information about various bilateral projects, which they have incentive to frame as development and as an element of wider strategies for economic growth. This in itself has facilitated and helped Chinese institutions in their efforts to gain greater public and media prominence. Thirdly, the research reveals sufficient evidence of a sustained effort by Beijing to improve its visibility, introduce new angles and content and influence local perceptions to a much greater extent. Fourthly, there is a rising number of local actors in the media sector eager to engage in such cooperation with various Chinese institutions.

MORE MODES OF CONTENT GENERATION AND PUBLICATION

While there are a number of different mechanisms for China-related content generation, an overall pro-Beijing stance is increasingly gaining a foothold in the media outlets of the region. Most countries in SEE have a difficulty in generating information and analysis in relation to China and its economy, politics and society on their own. This is due to limitations both in their media organizations and in their wider academic and research structures. Such realities have clearly provided Beijing with an opportunity to step in and supply a great deal of content. China's exploitation of this opening is reflected in the existing cooperation agreements, in which the overwhelming quantity of content originates from state media institutions and even some exclusively party publications such as the Global Times. A significant part of China-related content is sourced from state institutions in the region, often reports on joint projects and activities very selectively and purposely promotes certain narratives. A high degree of compatibility of interests appears to be behind this practice. China-related material that goes beyond the bilateral context is generally sourced from international, mostly Western, media outlets and generally contains commentary and news items about the wider context of Beijing's regional and global presence. There is a notable trend of increasing inclination to use Chinese sources directly, in most cases with little or no

editorial intervention. Further, due to the lack of sufficient knowledge and expertise, very few news items are produced locally. Another increasingly significant mechanism for expanding content presence is through the cross-sharing of information. The BRNN, already mentioned above, has one peculiar feature whereby Chinese media outlets generate BRI-related content that is subsequently not only directly shared with its members but is also relayed to the main media/information nodes. These are council members of BRNN and are often significant media players in their own right, with their own distribution policies. Members include entities such as Russian News Agency (TASS) and *Rosyyskaya Gazeta*, for instance.¹⁹ These entities are in a position to integrate China-related content, which is then made accessible through the TASS distribution network. Moreover, our research shows that some countries rely heavily on Russian media sources for China-related content. In a larger context, as citizens in the region increasingly learn about US-China competition from Beijing-friendly outlets, this could begin to influence perceptions about EU-US relations as well.

While it is possible to identify a trend towards greater interlinkage between the different components of an emerging Chinese media strategy, it would be premature to declare it a fully developed and functioning reality. But a number of nexuses of sustained interaction are already in place and are increasingly effective in ensuring the expansion of the country's media and public presence. One such nexus links China-friendly research and academic individuals and institutions and their gradual integration into the media landscape. This involves legitimizing their expertise through greater participation in various media formats such as commentary, analyses and reactions to current events. The academics and institutions in question are increasingly integrated into a coherent ecosystem of sustained cooperation through a variety of means, including research projects, teaching positions at Chinese and local universities, commissioning of analyses, etc. that provide pathways and access to local and Chinese media outlets. Another is the nexus between state institutions in many countries of the region and their Chinese counterparts. This nexus is evident in the production of synchronized content and the framing of cooperation as *win-win*. The slant is predominantly positive, factual background or project information is incomplete, and the narrative is compatible with China's aims. The misperception of Chinese loans as investments is a testimony to this dynamic. A third nexus links Chinese content generators and the local media organizations with which they have cooperation agreements. For instance, Chinese agencies such as Xinhua, newspapers and local embassies continually generate content which is then readily supplied to local partners. The content



is translated and published through various channels and media outlets, very often without much, if any, editing or additional context.

REPRESENTATIONS OR NARRATIVES?

China's media presence across SEE currently resembles a patchwork of disparate efforts rather than a coherent, fully integrated and embedded structure. The narrative clusters around a couple of images to be projected. One is China as a major economic power capable of offering significant financial resources structured as a series of large-scale projects. Major infrastructure and construction projects China engages in lend credence to this idea. A second image is that of a country that works at scale and has the capacity to plan and implement expansive projects. The implied contrast with the EU is clearly intended, even if not always explicitly spelled out. Thirdly, Beijing wishes to present itself as a swift and decisive actor, able to take decisions quickly and implement them at pace. The absence of the sort of conditions typical for EU projects has also been utilized as a helpful selling point, particularly in the Western Balkans. Fourthly, China has sought to portray itself as an actor with exclusively developmental concerns, focusing on activities at this level and seemingly sidelining other, more political dimensions of bilateral cooperation. Yet, despite these efforts, it appears that these images have not coalesced into a coherent, recognizable and embedded narrative about China's place and role in SEE. While it might seem a bit academic, the transition from images to narratives requires that a number of factors be in place. One is the actual and effective inter-linkage between its component parts. There is not enough of this inter-linkage in the region yet for this narrative to become coherent and recognizable. Another factor is the ability to sustain the embedding of a narrative over a substantial period of time. A third is the breadth of presence and prominence, the ability to place content and narrative across a wide range of media outlets and platforms with high impact. On current evidence, this is just beginning to occur. Fourthly, while Beijing might not wish to admit it openly, effective media and public engagement requires numerous local partners and allies in order to truly enter, position and embed a country's narrative. Chinese institutions have only just begun to implement such an approach, albeit at a rapidly accelerating pace. Based on this research, it would be premature to say that China has yet been able to make the shift from disparate representations to the embedding of a certain narrative across the region. At the same time, developments are trending in this direction and in countries such as Serbia and, to a lesser degree, Montenegro China may be close to achieving success.

Furthermore, some of the reasons for the fact that penetration into the media sphere is still quite incomplete is linked to China's intentions and approach. In the initial stages of its entry into the region, it seemingly tried to keep a low profile rather than boastfully announce its presence. This has limited the quantity, breadth and volume of information to a degree, slowing the process of generating and implanting a coherent narrative. There are signs that this is changing, but it has certainly been a contributing factor with regard to how disjointed China's public presence still is. All the same, given the trends that have been outlined here, it is only a matter of time before China finds itself in a much better position to structure and embed a coherent narrative.

STRUCTURAL MEDIA DEFICIENCIES AND CHINESE ENGAGEMENT

This survey provides further evidence for the various shortcomings and deficiencies of the region's media environments and the apparent need to seek and implement solutions at numerous levels. Moreover, in the current context of renewed geopolitical competition, these deficiencies serve to provide many openings for external actors seeking to utilize them. One general shortcoming is the media's persistent proximity to political power that is evident in many countries in SEE. This is accomplished via various means, ranging from ownership by intermediaries fronting for politicians to different models of state funding. In the current context, this often means that many media outlets act simply as megaphones for the government's policies towards China. The end result is less scrutiny and criticism, less public awareness and even indifference to potential corruption. Secondly, media organizations' traditional business models have been upended by various trends, most of them not unique to SEE. The overwhelming number of media organizations are in a state of financial vulnerability, especially if they seek to keep their distance from the state. Subscriptions and paywalls are not providing much of an alternative and the contraction of the advertising markets create additional difficulties. The withdrawal of Western media organizations is an additional aggravating factor. Thirdly, opaqueness of ownership persists despite much legislation seeking to address this matter. A certain discrepancy between formal and actual ownership is now so prevalent that few people even pay attention to nominal proprietorship any more. This has made identifying real owners and their interests and motivations a matter of investigation and speculation rather than mere analysis. Needless to say, this feature of the media context provides yet another opportunity for third-country actors. Fourthly, the accelerated transition away from print and towards web-based outlets has



facilitated the fragmentation of the media space, multiplying the platforms at the disposal of strategically motivated actors seeking to distribute content. The numerous smaller outlets with opaque ownership are particularly conducive to efforts of this kind. Finally, there is an insatiable hunger for content that is again being met by policies of subsidized supply of material. The availability of readily usable and free content is a particular concern in media markets with dysfunctional business models and significantly limited advertising markets. Moreover, current media market dynamics are likely to further worsen the above-mentioned problems.

CHINA'S MEDIA CHALLENGES

While China has been making significant progress in its positioning and embedding in the media environment of SEE, it is likely to face a series of challenges across a few dimensions. One challenge is China's style, which ranges from extreme formalism to an overbearing manner, at times verging on imperiousness. Both are particularly inappropriate in a social environment sensitive to rigid relational asymmetry due to its recent historical past. Another challenge is the ideational and cultural distance between China and SEE, which is more often hinted at than openly discussed but remains a reality nonetheless. In this sense, the basis for interaction reverts almost exclusively to the transactional, thus leaving question marks about its depth and durability. Thirdly, ideological rigidity remains an issue for some interlocutors, potentially turning into yet another obstacle to long-term, sustained embedding and influence. But there are other, less obvious issues Beijing faces. Thus far, the country has benefitted from the inconspicuous manner of entry and positioning across the region, adopting a largely 'under the radar' mode of activity. This has benefited the country in certain areas such as infrastructure and energy. However, as the geopolitical context is changing and the general public is gradually becoming more aware of its presence, China will soon become a 'revealed power'. Its actual scope of engagement will be becoming more visible, more questions will be asked, more worries will be expressed, more transparency will be demanded, and more action will be expected from the likes of the EU and NATO. Finally, although less tangibly and probably not as important in the long run, there are the side effects of the COVID-19 crisis. The crisis appears to be reintroducing optics counter to China's recent narrative efforts. China's main pillars have been notions of economic development and opportunity, a dynamic towards greater proximity, interaction and cooperation, a win-win perspective and, ultimately, a movement towards a common future

even if this type of more explicitly political language has not yet made much of an impact in the region. Yet the pandemic appears to have reinforced perceptions of difference, distance and even exoticism as Europeans learned, with some puzzlement, of the various culinary theories on the emergence of the current corona virus and of the socially Orwellian approaches to its containment in the subsequent months. If these impressions solidify, the basis for interaction will have changed to the disadvantage of China.

IV. Conclusions

- A perceptible overarching trajectory of Chinese media positioning in SEE can be identified. Its evolution from presence to embedding to leverage is evidenced by a series of activities over the couple of years. The strategic intent is apparent from the evolution and expansion of policies and tools of engagement and the cross application of practices in the region. Beginning from a low base, its scope and pace of entry into the media landscape is both impressive and worthy of analytical attention and policy response.
- China is creating an increasingly elaborate media cooperation framework with both state and private media institutions. It utilizes bilateral and multilateral mechanisms and employs a variety of tools ranging from formal cooperation agreements, study visits, content agreements, etc. China's mode of interaction has a 'pulsating' quality with sudden shifts towards greater engagement and even attempts at acquisition.
- A sustained increase in China-related media content is in evidence, even though its baseline is rather low. It is present across an expanding portfolio of media outlets, ranging from national to local, from state-owned to private and from political to life-style publications. The focus is largely on economy and business but is gradually expanding to include politics. Its tone and approach is largely positive and factual, with very little analytical and critical content.
- An emerging 'constituency of interest' in the wider media and publicity terrain is being established. This cooperative space has three pillars: legacy contacts and networks dating back decades, institutional counterparts and alliances and new actors, including interested media outlets, entrepreneurs, members of the Chinese diaspora and returning students. Interaction is not solely driven by exogenous incentives but has a self-reinforcing dynamic energized by perceptions of opportunity.
- Cooperation and content generation function along a series of nexuses of interaction. One is between Chinese institutions and various researchers, analysts and university lecturers, generating expertise and media presence. Another is between Chinese and state institutions in the region,

producing synchronized content and portraying a polished positive image of cooperation. A third is between Chinese content generators and local media organizations.

- A gradual transition from unconnected, discrete public relations efforts towards a coherent narrative is in progress. This is facilitated by the strengthening framework of cooperation, the change of posture and behaviour by Chinese institutions, the expansion of points of entry into the media environment and the widening range of cooperative actors. Such a shift requires a transition from inconspicuousness to a more open and assertive presence which is presently in train.
- China's efforts are further accelerated by the existing structural public and media weaknesses. These range from media proximity to government, which encourages media outlets to uncritically amplify the government's cooperation agenda, to the collapse of traditional business models. Ownership opaqueness creates yet another opening for outside actors with agendas, as does the endless multiplication of media platforms and web sites. An insatiable hunger for free content offers a further point of entry.
- Even so, China will be facing some headwinds as it attempts to embed and leverage its media presence. These range from an unsuitable style of interaction to cultural distance. Ideological rigidity is also an issue. China's strong presence in the region is becoming more and more apparent, inviting alertness and scrutiny. COVID-19 may also have negatively impacted China's ability to project its desired image, reinforcing a perception of difference, distance and exoticism.

Notes on Methodology

The current survey is based on qualitative research methods. Conducting face-to-face and online interviews has been the main element, with over 40 discussions conducted in eight countries over the period September–November 2020. Interviewees include media experts, journalists, policy analysts and researchers, university lecturers, diplomats, politicians and businesspeople. Desk research has also been conducted in relation to most topics covered in the report. Some previous analyses have been consulted and referenced. Previous policy and research experiences on China by the author were also utilized, particularly in relation to the identification of the emerging wider trends. The survey is based on a few assumptions that ought to be clearly articulated. The emerging trends identified are not equally present in all countries in South East Europe but represent clear directions of travel and configurations of approaches, policies and initiatives on the part of the Chinese side. Further research is needed on this variance. Probably causal factors include distinctiveness and heterogeneity in terms of history, political priorities, legacy relations, personnel, opportunities on the ground, etc. In any case, Chinese institutions are clearly prepared to transfer and cross-implement successful arrangements. The wider region is perceived as open to their application and transfer. While there continues to exist something of a consensus that China lacks a coherent and clearly formulated approach to the wider region of South East Europe, Beijing is showing obvious signs of strategic intent and treats the area as a common space across which it circulates an identifiable set of tools, personnel and knowledge. From such a perspective, the existence or absence of specific political or policy documents is of rather marginal importance relative to on-going *de facto* processes. The survey is also very mindful of the limited time span – less than a decade – within which China has been able to define and implement extensive measures and initiatives. Lastly, while the country has a prior history of political presence and engagement in the region, its recent activities are more aptly described as entry rather than re-entry, as some experts have insisted.

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Footnotes

- ¹ <https://www.clingendael.org/publication/china-and-eu-western-balkans>
- ² <https://ecfr.eu/article/china-goes-granular-beijings-multi-level-approach-to-the-western-balkans/>
- ³ <http://library.fes.de/pdf-files/bueros/sarajevo/16005.pdf>
- ⁴ <https://www.foreignaffairs.com/articles/china/2020-07-15/china-done-biding-its-time>
- ⁵ <https://www.bbc.com/news/world-asia-china-52562549>
- ⁶ <https://thediplomat.com/2020/05/interpreting-chinas-wolf-warrior-diplomacy/> and <https://moderndiplomacy.eu/2020/07/14/wolf-warriors-a-brand-new-force-of-chinese-diplomats/>
- ⁷ <https://www.aspi.org.au/report/chinese-communist-partys-coercive-diplomacy>
- ⁸ <https://freedomhouse.org/report/special-report/2020/beijings-global-megaphone>
- ⁹ <https://freedomhouse.org/report/special-report/2020/beijings-global-megaphone>
- ¹⁰ https://fsi-live.s3.us-west-1.amazonaws.com/s3fs-public/sio-china_story_white_paper-final.pdf
- ¹¹ http://www.chinaja.org.cn/2018-06/21/c_138153012_21.htm
- ¹² Ministry of Foreign Affairs of the PRC: https://www.fmprc.gov.cn/mfa_eng/wjb_663304/zwj_665342/zwd_665378/t908036.shtml
- ¹³ http://www.xinhuanet.com/english/europe/2019-10/20/c_138487215.htm
- ¹⁴ https://china-cee.eu/wp-content/uploads/2020/06/Working_paper-202021-by-Visar-Sylaj.pdf
- ¹⁵ BNA Annual Report 2017: https://www.parliament.bg/pub/cW/20170515112437SKM_BT_36170515104700.pdf
- ¹⁶ Cooperation Programme between Bulgaria and the CPR for the period 2001 – 2003: <https://www.ciela.net/svobodna-zona-darjaven-vestnik/document/-12550654/issue/750>
- ¹⁷ <http://en.brnn.com/n3/2019/0411/c414872-9565686.html>
- ¹⁸ <http://www.chinadailyglobal.com/a/201909/30/WS5d915400a310cf3e3556e3e8.html>
- ¹⁹ <http://en.brnn.com/n3/2019/0425/c415308-9571930.html>