InvigoratEU

Invigorating Enlargement And Neighbourhood Policy For A Resilient Europe

Long Policy Report on Russia´s ambitions and leverage

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Funded by the European Union

Executive summary

Beyond the Kremlin's Grasp? The Decline and Persistence of Russian Influence in EU Candidate Countries

This study analyses Russia's influence in the Eastern Trio (Georgia, Moldova, and Ukraine) and the Western Balkans (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia) over the past decade, focusing on its political, economic, and societal dimensions. Using the *InvigoratEU External Influence Index*, a comprehensive empirical tool specifically designed for this study, it systematically measures and compares Russian leverage across nine EU candidate countries. The index captures shifts in influence from 2013 to 2023, highlighting how political-security dynamics, economic dependencies, and societal developments have shaped Moscow's leverage in the region and the strategic responses of affected states. The findings reveal a general decline in Russian influence, particularly in the political and economic spheres, while societal influence remains more resilient. Political leverage has weakened as countries distance themselves from Moscow, though informal networks and disinformation campaigns persist. Economic influence has been reduced through energy diversification and trade realignment, limiting Russia's capacity for coercion. However, societal influence remains a key vector, with Russian media, religious networks, and ideological narratives continuing to shape public opinion and foster Euroscepticism. These trends highlight the need for a proactive EU response that reinforces the credibility of enlargement, strengthens energy independence, and counters Russian disinformation. Further gradual integration of candidate countries into the EU could maintain reform momentum and systematically diminish Moscow's leverage, while targeted investments in energy infrastructure and diversified supply routes would enhance regional resilience and limit Russia's capacity for economic coercion. Additionally, enhanced support for independent media, fact-checking initiatives, and strategic communication in local languages is essential to mitigating Russian influence. The study underscores that while Russia's ability to exert direct control is diminishing, its capacity to shape societal narratives remains a challenge, requiring a forward-looking EU strategy that integrates political, economic, and societal dimensions to reinforce resilience and strategic influence in the region.

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About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

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1 Introduction

Over the past two decades, Russia has emerged as one of the major disruptors of European security, with great-power rivalry between Russia and the European Union becoming increasingly intense. While relations between Moscow and Brussels were relatively cooperative during the 1990s and early 2000s—marked by initial optimism regarding Russia's democratic and market-oriented reforms, as well as its willingness to meaningfully contribute to the fight against global terrorism—the relationship gradually became strained as Moscow adopted a more confrontational stance towards the West. Clear signs of divergence emerged at the 2007 Munich Security Conference, where President Vladimir Putin openly criticised Western policies (in particular, NATO expansion eastward), challenging the legitimacy of the existing European security architecture and signalling Russia's dissatisfaction with its role within it. The tensions intensified further in 2008, when Russia intervened militarily in Georgia, directly confronting principles of territorial integrity and sovereignty that underpin European security. Relations deteriorated sharply in 2014 following Russia's annexation of Crimea, which marked the beginning of its war against Ukraine, triggering EU sanctions and ushering in an era characterised by heightened Russian cyberattacks, political interference, and widespread disinformation campaigns. This deterioration culminated in Russia's full-scale invasion of Ukraine in 2022, representing a fundamental shift in Europe's security landscape. In an era of rising multipolarity and strategic uncertainty, the evolution of EU-Russia relations will remain crucial for Europe's security and broader geopolitical stability.

These developments highlighted the urgency for the EU to enhance its resilience in the face of rising geopolitical frictions. Resilience can be defined as "the ability of states and societies to reform, thus withstanding and recovering from internal and external crises".[1] For the EU, resilience extends beyond its own member states and incorporates its immediate neighbourhood. Effective resilience thus requires recognising and addressing interdependencies and shared vulnerabilities between the EU and neighbouring regions—vulnerabilities which external actors frequently exploit to challenge European values and interests. To build such resilience comprehensively, the EU seeks to adopt a multidimensional and integrated approach to security. Within this framework, the EU's "modernisation logic" seeks to reinforce the internal resilience of candidate countries—the so-called "inside of the outside"—by promoting stable democratic institutions, economic development, and social cohesion. Conversely, the "geopolitical logic" aims to safeguard these countries from external interferences and interventions by rival actors, thus strengthening the "outside of the outside".[2] This dual logic highlights the importance of thoroughly understanding external influences —including their ambitions, methods and leverage—particularly those exerted by Russia.

This policy report aims to provide an in-depth analysis of Russia's geopolitical ambitions and instruments of influence in two strategically important regions closely linked to the EU: the Eastern Trio (Georgia, Moldova, and Ukraine) and the Western Balkans (Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia, Montenegro, and Serbia). The analysis is

[1] European External Action Service: European Union Global Strategy, 2016, p. 23.
[2] See more: Hannah Brandt/Funda Tekin/Paul Bargués/Ramūnas Vilpišauskas: Growing Resilient Together: Reshaping EU-Enlargement and Neighbourhood Policy in a Geopolitical Era, June 2024.
* This designation is without prejudice to positions on status and is in line with UN Security Council Resolution 1244 and the International Court of Justice Opinion on the Kosovo Declaration of Independence.

grounded in the **InvigoratEU External Influence Index**,[3] an original empirical tool developed for this research to systematically measure and compare Russia's influence across political, economic, and societal dimensions. By combining qualitative assessments with a structured quantification of external leverage, the report identifies key patterns and variations in Russian engagement across these regions. Through this comprehensive approach, it seeks to formulate actionable policy recommendations aimed at strengthening the EU's strategic resilience and enhancing its capacity to effectively respond to Russia's evolving geopolitical strategies.

2 Methodological Framework

This study employs a structured, multi-dimensional approach to assess Russia's geopolitical influence in the EU's Neighbourhood: both the Eastern Trio and the Western Balkans. The analysis is based on a combination of qualitative and quantitative research methods, designed to capture the complexity of external influence in these regions. At the core of this methodological approach is the *InvigoratEU External Influence Index*, a rigorously developed empirical tool designed specifically within the InvigoratEU project to systematically quantify and compare external actors' political, economic, and societal leverage across the analysed regions. The InvigoratEU External Influence Index is jointly developed within the framework of the InvigoratEU project by the European Policy Centre (CEP) and Istituto Affari Internazionali (IAI), with contributions from partner organisations: Institut für Europäische Politik (IEP), PMC Research Center (PMC RC), Ss. Cyril and Methodius University (UKIM), and Institue for Strategic Initiatives (IPIS). The Index builds upon the pioneering work carried out by CEP in developing a pilot index to measure the influence of foreign actors in Serbia,[4] but significantly expands it to cover nine countries and three external actors, enabling regional comparison and longitudinal trend analysis. Through this collective effort, the project advances a comprehensive and transferable methodology for assessing external influence, fully aligned with the objectives of this Horizon-funded research.

Conceptual Foundations of the InvigoratEU External Influence Index

The development of the InvigoratEU External Influence Index builds on existing theoretical frameworks that examine how external actors exert influence over third countries. A key foundation is the concept of linkages and leverage, introduced by Levitsky and Way, which differentiates between two mechanisms of external influence.[5] Linkages refer to structural interdependencies—economic, intergovernmental, technocratic, social, informational, and through civil society—that integrate a country into the international system and shape its political and economic choices. Leverage, on the other hand, denotes the ability of an external power to exert direct pressure on domestic actors to alter policies or strategic

[3] The InvigoratEU External Influence Index was developed within the InvigoratEU project to assess and compare the geopolitical influence of Russia, China, and Türkiye in EU candidate countries. While this report focuses exclusively on Russia, the same index will be used to analyse and present findings on China and Türkiye in the forthcoming long policy reports, to be published during the course of the project. As such, the index provides a consistent analytical framework for cross-actor and cross-country comparison.

[4] Strahinja Subotić/Miloš Janjić: Serbia at the Crossroads between the West and the East, European Policy Centre (CEP), 2020.

[5] Steven Levitsky/Lucan A. Way: Linkage versus leverage. Rethinking the international dimension of regime change, in: Comparative Politics, 38 (4), 2006, pp. 379-400.

orientations. These two elements interact dynamically, with stronger linkages often amplifying an external actor's leverage over domestic decision-making processes.

In addition, the index is designed so as to align with Nye's concept of "soft power", which recognises that influence is not exerted solely through coercion or economic dependency, but also through the diffusion of norms, cultural ties, and informational dominance.[6] This is particularly relevant in assessing Russia's engagement, as Moscow employs both traditional power projection and indirect influence strategies—such as media presence, ideological narratives, and elite networks—to shape public perception and policy directions in targeted countries.

Building on these theoretical insights, Bieber and Tzifakis propose a structured categorisation of external influence by grouping different types of engagement into three broader sectors: political/military, economic, and societal.[7] While Levitsky and Way originally identified six distinct linkage dimensions, Bieber and Tzifakis argue that a more consolidated classification provides a clearer analytical framework for understanding external influence. Their approach highlights how external actors strategically utilise multiple dimensions of influence in tandem, reinforcing their geopolitical presence through a combination of institutional penetration, economic dependencies, and cultural affinity.

Structure of the InvigoratEU External Influence Index

The **External Influence Index** operationalises theoretical insights by measuring Russian influence along three primary dimensions:

1. **Political-Security Influence** – Covering indicators related to *bilateral and multilateral platforms, interference in internal politics, military cooperation, and foreign policy alignment*. This includes Russia's engagement in diplomatic initiatives, its relationships with political parties, election meddling, legislative influence, defence partnerships, and alignment with or opposition to key national interests of the analysed countries.
2. **Economic Influence** – Assessing *trade and investment relations* as well as *strategic economic dependence*. This dimension measures Russia's role in bilateral trade agreements, foreign direct investment flows, ownership of key economic assets, energy dependency, and foreign debt exposure, providing insights into how economic leverage translates into geopolitical influence.
3. **Societal Influence** – Examining *mobility and connectivity, cultural and informational presence*, and *public perceptions*. This includes factors such as visa regimes, diaspora influence, tourism, student exchanges, media penetration, religious and cultural ties, and public opinion on Russia's role in the respective countries.

[6] Joseph Nye: Soft Power. The Means to Success in World Politics, Public Affairs 2004.
[7] Florian Bieber/Nikolaos Tzifakis: The Western Balkans in the World. Linkages and Relations with Non-Western Countries, Routledge 2020.

Each dimension is composed of a series of indicators, assessed using a structured scoring system ranging from 0 to 3, reflecting the intensity and depth of Russian engagement in each area. For the purpose of visual clarity and more intuitive comparison across countries and years, the aggregated scores presented in the graphs have been rescaled to a 0–10 range, while retaining the proportional values derived from the original 0–3 scale. The complete structure of the index, including all indicators and their respective weightings, is provided in **Annex I**.

Research Design and Data Collection

The study employs a mixed-methods approach, integrating both quantitative data collection and qualitative analysis. The research process consisted of:

- **Desk Research** – A systematic review of academic literature, policy reports, official documents, and media sources to map Russian influence across the targeted countries.
- **Index Scoring** – The InvigoratEU External Influence Index was compiled through a structured evaluation process, integrating data from publicly available sources, expert assessments, and systematic cross-referencing with regional studies to enhance reliability and analytical consistency.
- **Interviews with Experts**– Semi-structured interviews were conducted with policymakers, analysts, and scholars to contextualise the quantitative findings and provide insight into recent developments.

It is important to note that this study does not include fieldwork or primary source analysis conducted within Russia. This is a deliberate methodological choice: the aim is not to investigate how Russia formulates its foreign policy from within, but rather how its geopolitical ambitions materialise in the external environment. By focusing on how Russian influence is projected and perceived in EU candidate countries, the research captures the mechanisms, intensity, and impact of this influence where it is actually exercised—on the receiving end.

This study adopts a historical perspective, examining the evolution of Russian influence over the past decade rather than focusing solely on the present moment. The External Influence Index was calculated for three key years: **2013, 2018, and 2023**, allowing for a comparative analysis of trends and shifts in Russia's engagement across political, economic, and societal dimensions.[8] The selection of 2013 as the primary benchmarking year is methodologically significant for multiple reasons. First, it represents the last full year before major geopolitical shifts—most notably the 2014 annexation of Crimea and the beginning of the Russian war against Ukraine—leading to the deterioration of Russia-EU relations.

[8] The reference year 2023 was chosen as the most recent point of analysis, as desk research was conducted in 2024, but comprehensive data—particularly economic indicators—were not yet fully available for that year. However, the study is not blind to present developments; where critically relevant, the analysis includes key events from 2024 and early 2025 to provide additional context. Nonetheless, the InvigoratEU External Influence Index itself is calculated based on data from 2023.

Second, 2013 was a pivotal year for EU integration efforts, as it marked key decisions regarding enlargement. That year, EU member states agreed to open accession negotiations with Serbia, following Montenegro's formal start of negotiations in 2012. Furthermore, 2013 directly preceded the signing of Association Agreements between the EU and Ukraine, Moldova, and Georgia in 2014—an event that significantly influenced regional political alignments and Russia's strategic response. Moreover, Croatia's accession to the EU in 2013 represented the most recent expansion of the Union, further shaping the broader political and economic context of EU-enlargement policies. The years 2018 and 2023 were selected to allow for a structured time comparison. The year 2018 represents a midpoint between 2013 and 2023, offering a snapshot of regional dynamics at a time when Russia-EU confrontation had already intensified, but prior to the full-scale invasion of Ukraine. Meanwhile, 2023 was chosen as the most recent year with sufficient data availability—especially in the economic domain—at the time of research implementation in 2024. Crucially, it also reflects the post-24 February 2022 landscape, enabling the assessment of how Russia's influence—and the responses to it—evolved following this major geopolitical rupture.

While the index calculations focus on 2013, 2018, and 2023, the analysis also takes into account relevant developments from preceding years when necessary. This is particularly important for accurately capturing the state of Russian influence in 2013, as key trends and policies in place at the time were often shaped by events occurring in the years immediately preceding it. For instance, political alignments, economic dependencies, and security relations evident in 2013 may have been the product of negotiations, treaties, or investments made a few years before. By adopting this structured historical perspective, the study provides a dynamic perspective on how Russian influence has evolved over time, rather than offering just a static snapshot of individual years. The inclusion of three distinct points in time makes it possible to observe patterns of continuity and change, assess the impact of major geopolitical shifts, and generate more robust policy insights for EU decision-makers.

3 Russia's Post-Soviet Ambitions: From Pragmatism to Power Projection

Russia's geopolitical ambitions have undergone significant transformations since the collapse of the Soviet Union, shifting from a pragmatic search for stability through cooperation with the West to a deliberate strategy of confrontation. In the 1990s, Russia's ambition was not full-scale integration into Western structures, but rather economic and political recovery through engagement with Western institutions.[9] Struggling with internal turmoil, Moscow sought to rebuild its status by securing financial aid from the International Monetary Fund (IMF) and the World Bank, deepening trade ties, and even exploring limited security cooperation with NATO. However, this ambition was not accompanied by a genuine willingness to embrace the Western liberal order but aimed at establishing a multipolar world.[10]

[9] Andrei Kozyrev: Russia. A chance for survival, in: Foreign Affairs, 71(2), 1992.
[10] Eugene Rumer: The Primakov (Not Gerasimov) Doctrine in Action, 5 June 2019, available at: https://carnegieendowment.org/research/2019/06/the-primakov-not-gerasimov-doctrine-in-action?lang=en (last accessed: 17.03.2025).

By the late 1990s, disillusionment with Western influence grew, fueled by slow economic growth, NATO's eastward expansion, and NATO's military intervention in Yugoslavia, which Russia openly opposed. This shift in ambition—from cautious cooperation to strategic opposition—became evident in the 2000s, with Russia increasingly positioning itself not as a partner within the Western-led system, but as a counterweight to it. The war against Georgia (2008), the annexation of Crimea (2014), election interference and disinformation campaigns across Europe, and the full-scale invasion of Ukraine (2022) all reflect this transformed ambition. **More than three decades after the Soviet collapse, Russia no longer seeks accommodation with the West but rather strives to assert itself as its rival, marking a return to Cold War-like geopolitical dynamics.**

From a **realist perspective** in International Relations, Russia's geopolitical ambitions stem from the fundamental logic of power politics, where states seek security by maximising their influence and countering potential threats.[11] After the Soviet collapse, Russia faced a severe loss of power, but as its economic and military strength recovered in the 2000s, so did its drive to reassert control over its periphery. NATO expansion and EU enlargement were perceived as direct threats, altering the regional balance of power.[12] Consequently, Russia adopted a revisionist stance, using coercion, hybrid warfare,[13] and military interventions to prevent Western-aligned governments in neighbouring states. As offensive realism suggests, great powers will not settle for defensive security but instead seek dominance in their region,[14] which explains Russia's willingness to use force in Georgia and Ukraine. Unlike ideological explanations, realism interprets Russian foreign policy as a strategic effort to ensure that no rival power bloc dominates its sphere of influence.

From a **constructivist perspective**, Russia's geopolitical ambitions are shaped by its national identity, historical narratives, and cultural values. Constructivism posits that state behaviour is influenced not only by material power but also by ideational factors, including collective beliefs and identities. After the Soviet Union's collapse, Russia grappled with a sense of ontological insecurity, seeking to redefine its place in the world.[15] This led to the resurgence of Eurasianism, an ideology asserting that Russia is neither entirely European nor Asian but occupies a unique civilisational space. Proponents like Aleksandr Dugin have

[11] John Mearsheimer: The Tragedy of Great Power Politics, Norton 2001.
[12] Samuel Charap/Timothy J. Colton: Everyone loses. The Ukraine Crisis and the Ruinous Contest for post-Soviet Eurasia, Routledge 2017.
[13] The term "hybrid warfare" is often used broadly and can encompass a wide range of state and non-state activities. For analytical consistency, this study refers to the definition provided in the InvigoratEU project's Analytical Glossary, which draws on the European Centre of Excellence for Countering Hybrid Threats: "[a]n inherent characteristic of hybrid threats entails blurring traditional dichotomies and creating ambiguity and uncertainty. The goal is to achieve national interests and objectives through strategies such as undermining public trust in democratic institutions, deepening unhealthy polarization, challenging the core values of democratic societies, interfering in democratic elections, and affecting the decision-making capability of political leaders, even by the use of military means."
[14] Dominic D. P. Johnson/Bradley A. Thayer: The evolution of offensive realism. Survival under anarchy from the Pleistocene to the present, in: Politics and the Life Sciences, 35(1), 2016.
[15] Dina Moulioukova/Roger E. Kanet: Ontological security. A framework for the analysis of Russia's view of the world, in: Global Affairs, 7(5), 2021, pp. 831-853.

advocated for Russia to lead a Eurasian bloc, countering Western liberalism and promoting traditional values.[16] This ideological framework has influenced Russia's foreign policy,

steering it towards alliances with non-Western countries and opposition to Western hegemony. Thus, Russia's actions on the global stage can be interpreted as an attempt to restore its great power status, driven by a sense of historical grievance and the perception that the Soviet Union's Cold War defeat was a national humiliation.

Theoretical foundations in both realist and constructivist studies ultimately converge on a single overarching ambition in Russian foreign policy: **the reassertion of its status as a global power**. This ambition, which is well-documented in academic literature, has been further confirmed by our research. Moreover, our research has contributed to this understanding by offering a more structured classification of how this overarching ambition manifests in practice. Specifically, we have identified three interrelated sub-ambitions that encapsulate Russia's geopolitical behaviour:

- **Enforcing regional hegemony over post-Soviet states**. Russia perceives former Soviet republics, particularly Georgia, Moldova, and Ukraine, as part of its rightful sphere of influence and has actively sought to obstruct their integration into Western structures such as NATO and the EU. This influence is exerted through a combination of direct military interventions, support for separatist movements, economic pressure, and political destabilisation. By keeping these states in a state of political and economic dependency, Russia aims to prevent their alignment with the West, ensuring that they remain, at the very least, neutral buffer zones rather than pro-Western actors on its periphery.

- **Undermining Western cohesion and institutions**. In regions where Russia has historically had comparatively less influence, such as the Western Balkans, its strategy is not aimed at full dominance but rather at improving its relative position vis-à-vis the West. This is achieved through deliberate efforts to erode public trust in Western institutions and obstruct Western influence. Russia pursues this goal by supporting nationalist and Eurosceptic movements, exploiting historical and cultural ties, and actively countering Western engagement—whether through political means, economic leverage, or media influence.
- **Enhancing economic and energy dominance**. This sub-ambition is both an independent objective and a fundamental tool for advancing Russia's broader geopolitical strategy. By leveraging its vast natural resources, particularly in the energy sector, Russia exerts economic and political pressure on other states, using energy dependencies as a means of influence. Beyond energy, Russia expands its economic footprint through investments in strategic sectors, financial leverage, and economic partnerships that create dependencies beneficial to its geopolitical interests. These mechanisms allow Russia to undermine Western influence, deter alignment with Western institutions, and ensure that key regions remain within its sphere of influence.

[16] Alan, Ingram: Alexander Dugin. Geopolitics and neo-fascism in post-Soviet Russia, in: Political Geography, 20(8), 2001, pp. 1029-1051.

4 Dimensions of Russian Influence

The following sections of this study will examine the concrete mechanisms through which Russia pursues these geopolitical ambitions. In line with the previously described methodology, the analysis will be structured around three key dimensions of Russian influence: political, economic, and societal. Each of these dimensions reflects a distinct yet interconnected avenue through which Russia exerts its power, ranging from direct political intervention and economic leverage to information warfare and cultural diplomacy. By examining these mechanisms through research, empirical data, and theoretical insights, the next chapters will offer a nuanced perspective on how Russia implements its geopolitical strategy in practice.

Political Influence: Evolution, Patterns, and the Political Sub-Index

Russia is an actor that has continuously aimed to reaffirm its status of a global power, by actively seeking to increase its political influence in East and South-East Europe, i.e. Eastern Trio and the Western Balkans. As such, during the analysed period from 2013 to 2023, its projection of power has taken three overlapping forms in the political arena[17]. The first is *formal interstate engagement*, reflected in diplomatic relations and official agreements, though often constrained by geopolitical alignments. The second operates through its *interference in internal politics*, where it builds ties with political parties, exerts influence through key domestic actors or interferes in elections. The third, and most disruptive, relies on *overt coercion*, which ranges from cyberattacks to support for secessionist movements and direct military actions.

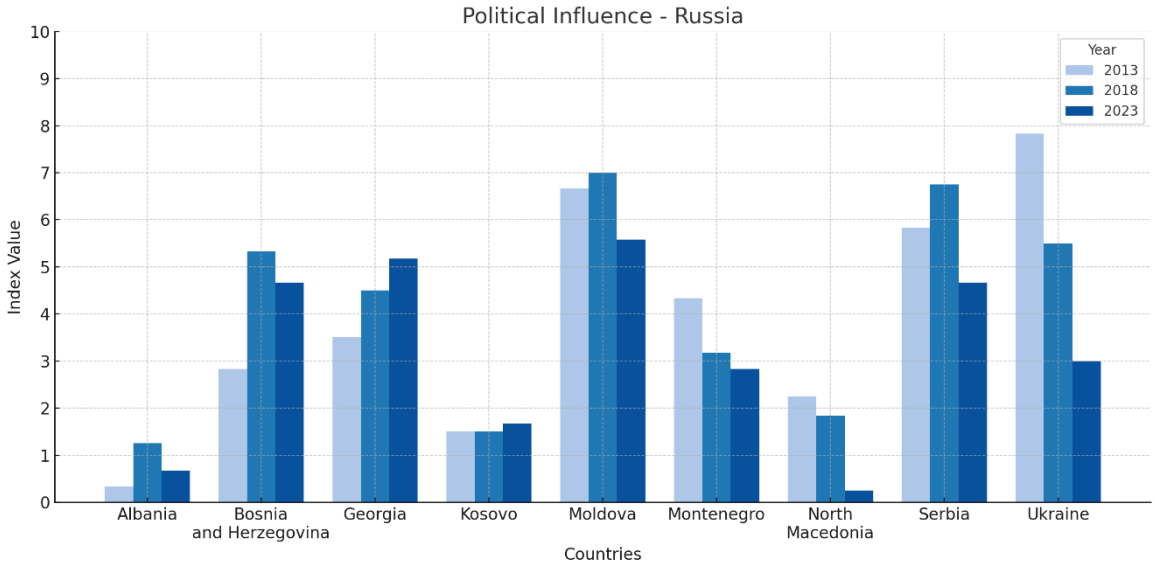
However, it is crucial to underline that while the InvigoratEU External Influence Index captures certain dimensions of overt coercion—such as support to secessionist actors and military presence in non-controlled territories—it does not cover instances of full-scale warfare. The case of Ukraine illustrates this limitation: the collapse of Russia's influence in "softer" political domains (such as diplomatic engagement, party cooperation, and institutional alignments) during the analysed period ultimately gave way to direct military aggression, marking a shift from interference to open conflict.

The general observation across both the Eastern Trio and the Western Balkans is that the more Russia attempted to exert political influence, the more it increased resistance by candidate countries, rendering its efforts largely counterproductive. This trend is clearly illustrated in Figure 1 and Figure 2, which visualise the trajectories and intensity of Russian political influence across the two regions. In Montenegro, North Macedonia, and Ukraine,[18] Russian political influence has been in continuous decline throughout the decade, as early geopolitical crises—Crimea's annexation in 2014, an attempted coup in Montenegro in 2016, and the fall of a long-standing authoritarian regime in North Macedonia the same

[17] The full set of political indicators reflecting Russia's projection of political power can be found in Annex I.
[18] For the reasons described above, the assessment of Russian influence in Ukraine, as captured in the InvigoratEU External Influence Index, covers only the territories under the control of the Ukrainian government as of the time of analysis.

year—triggered an active push against Moscow's involvement. In contrast, Albania, Bosnia and Herzegovina, Moldova, and Serbia initially experienced a rise in Russian influence between 2013 and 2018, but in the period 2018-2023, these countries began to shift away from Russian influence, due to strengthened institutional resilience, particularly in response to cyberattacks and disinformation campaigns (Albania and Moldova) or as a result of mounting geopolitical pressure following the start of the full-scale invasion of Ukraine (Bosnia and Herzegovina and Serbia). Georgia remains the only country where Russian political influence has steadily increased over time, driven by the government's increasing strategic balancing between Moscow and Brussels and its reluctance to impose sanctions on Russia.[19] With such trends at hand, it becomes clear that there has been a broader and gradual shift away from Russia's influence, leaving it with fewer allies it can count on.

Figure 1: The Political Influence Sub-Index Over Time (2013–2023)

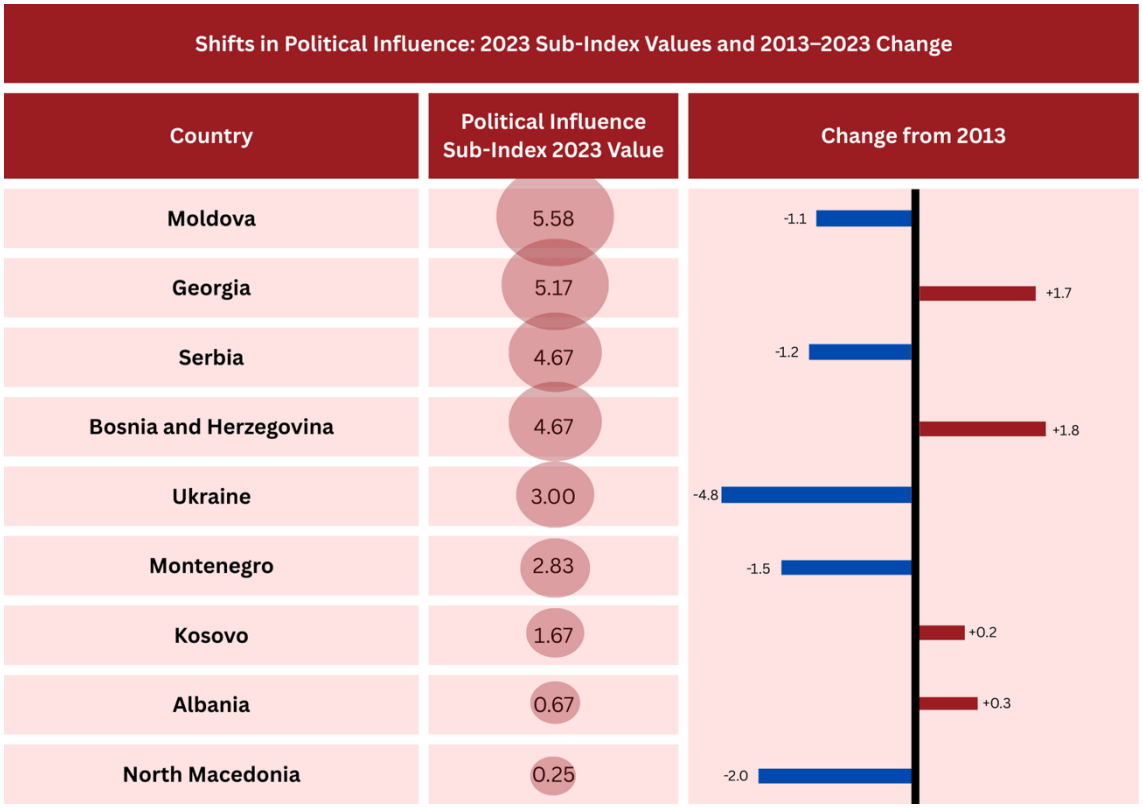


Almost all countries of the two regions have avoided close ties and formal interstate cooperation with Russia either due to territorial disputes with Moscow or geopolitical alignment with the West. The only consistent exception is Serbia, which has nurtured close bilateral relations with Russia, largely in exchange for Moscow's support on the Kosovo issue. Some countries have completely severed diplomatic ties—Georgia in 2008[20] and Ukraine in 2022[21]—while others, like Albania[22] and Montenegro[23], imposed sanctions as early as in 2014, significantly restricting bilateral engagement. High-level visits have been rare—

[19] Besides Georgia, Kosovo has also seen a minor increase in Russian influence since 2018, primarily due to the stagnation in the Belgrade-Pristina dialogue, which has given Moscow slighlty greater leverage over political dynamics in Serb-populated northern Kosovo.
[20] BBC: Georgia Breaks Ties with Russia. 29.08.2008.
[21] Aljazeera. Ukraine Cuts Diplomatic Ties with Russia after Invasion. 24.02.2022.
[22] Exit News. Albania Extends Economic Sanctions against Russia. 03.08.2017.
[23] Aljazeera. Crna Gora produžila sankcije Rusiji. 25.06.2016.

Russian President Vladimir Putin visiting only Serbia, in 2014 and in 2019.[24] In multilateral settings, no country has engaged with Russia-led political frameworks since Ukraine's withdrew from the Commonwealth of Independent States (CIS) in 2014,[25] with the partial exception of Serbia, which has held observer status in the Collective Security Treaty Organisation (CSTO).[26] Bilateral parliamentary cooperation, where it exists, remains symbolic and largely inconsequential. Defence cooperation is also concentrated only in Serbia, which was the only EU candidate country to purchase Russian military equipment between 2013 and 2023 ($348 million)[27] and the only one to conduct joint military exercises with Russia.[28] Having these patterns in mind, Russia's formal marginalisation highlights the overall geopolitical orientation of the Western Balkans and Eastern Trio, as well as the failure of Russia's institutional outreach in both regions.

Figure 2: Political Influence Sub-Index Values in 2023 Compared to 2013



[24] President of Russia Website: International Trips, available at: http://www.en.kremlin.ru/events/president/trips (last accessed: 17.03.2025).
[25] Radio Free Europe/Radio Liberty: Ukraine Announces Plans To Quit CIS, Terminate Parts Of Russia Friendship Treaty, 12.04.2018.
[26] Nikola P. Rajić: Relations between CSTO and Republic of Serbia and the perspective of the organisation itself, in: Kultura polisa, 17 (42), 2020, p. 322.
[27] Stockholm International Peace Research Institute: SIPRI Arms Transfer Database, available at: https://www.sipri.org/databases/armstransfers (last accessed: 17.03.2025).
[28] Rajić: Relations between CSTO and Republic of Serbia and the perspective of the organisation itself, 2020, p. 323.

Faced with limited ability to project power via official interstate cooperation, Russia has relied on cultivating **ties with political actors**—whether political parties, movements, or influential individuals—as one of its key strategies for shaping domestic decision-making from within. This approach tends to be particularly effective in settings where political financing lacks transparency, institutional oversight is limited, and corruption is entrenched. In such environments, informal channels of influence—ranging from opaque funding to mutually beneficial personal networks—can become powerful tools for Russia. As corruption undermines institutional integrity and concentrates influence in informal hands, it creates fertile ground for Russia to advance its agenda with limited visibility and minimal resistance. These dynamics have played out across the region in various forms. In Georgia, Bidzina Ivanishvili, a billionaire and founder of the ruling *Georgian Dream* party, has long maintained strong business relations with Russia, contributing to a more cautious approach toward the Kremlin.[29] In Moldova and Ukraine, openly pro-Russian parties—the *Party of Regions* in Ukraine and the *ȘOR Party* in Moldova—once played a significant role in domestic politics but both were banned in 2023,[30] respectively, as part of broader efforts to curb Russian influence. In North Macedonia, the far-left *Levica* party, which holds around 10% of parliamentary seats, actively promotes Russian-aligned narratives.[31] In Serbia, Russia previously maintained ties with the ruling *Serbian Progressive Party*, but after the invasion of Ukraine, its influence has shifted to smaller, pro-Russian parties, primarily the *Socialist Party of Serbia* and the *Movement of Socialists*.[32] Similarly, in Bosnia and Herzegovina, Russia's strongest political ally is Milorad Dodik, the leader of Republika Srpska, who consistently opposes Bosnia and Herzegovina's NATO integration and advocates for policies aligned with Moscow's interests.[33] Through these political networks, Russia retains influence even when countries distance themselves from Moscow at the state level, using clandestine connections to advance its narratives, foster internal divisions, and shape concrete policy decisions.

Another manifestation of Russia's attempts to influence political outcomes in the region is through **electoral and referendum interference**. These efforts are particularly visible in key moments when countries have faced critical decisions regarding their geopolitical orientation. Such was the case in North Macedonia, where Russia attempted to sway the 2018 referendum on the Prespa Agreement, which aimed to resolve the long-standing name dispute with Greece and clear the path for NATO accession. Pro-Russian actors spread disinformation and encouraged a boycott of the referendum, seeking to derail the agreement and obstruct the country's NATO integration.[34] A similar effort occurred in Montenegro during the 2016 parliamentary elections, when Russian intelligence operatives were accused of orchestrating a coup attempt. The plan allegedly involved violent attacks on government

[29] Regis Gente: Bidzina Ivanishvili, a man who plays according to Russian rules?, in: Caucasus Survey, 1 (1), 2013.
[30] The Kyiv Independent: Court Bans Yanukovych's Pro-Russian Party of Regions, 21.02.2023.
BBC: Moldovan court Bans Pro-Russian Party Sor, 19.06.2023.
[31] Goce Trpkovski: North Macedonia. The elections that may have changed the country inside and outside, 6 July 2024, available at: https://ba.boell.org/en/2024/07/06/north-macedonia-elections-may-have-changed-country-inside-and-outside-0 (last accessed: 17.03.2025).
[32] Wouter Zweers/Niels Drost/Baptiste Henry: Little Substance, Considerable Impact. Russian Influence in Serbia, Bosnia and Herzegovina, and Montenegro, Clingendael 2023.
[33] Zweers/Drost/Henry: Little Substance, Considerable Impact. Russian Influence in Serbia, Bosnia and Herzegovina, and Montenegro, 2023.
[34] Ilche Dimovski: Russia's geopolitical interests in the Republic of North Macedonia during the period of renaming, in: Knowledge – International Journal, 46 (5), 2021.

institutions and an attempt to assassinate then-Prime Minister Milo Đukanović, with the goal of installing a pro-Russian government that would halt Montenegro's NATO accession process.[35] In Albania, Russian interference was exposed in 2017, when authorities investigated allegations that Moscow funnelled €500,000 to the Democratic Party ahead of parliamentary elections.[36] Unlike in Montenegro, where the goal was to block NATO membership, Russia's interest in Albania might have stemmed from a broader effort to undermine regional stability; by supporting the opposition, it could have weakened the pro-Western government's stability and created political turbulence at a time when Albania was seeking to advance its EU accession process. Although Russian efforts in election interference did not always achieve their intended outcomes, they may have contributed to eroding public trust in the legitimacy of the electoral process and the independence of political parties from foreign financing and influence.

When less direct methods proved futile, Russia has exerted influence through **coercive tactics**, including cyberattacks, military support for separatist movements, and full-scale war. One of the most extreme examples of **cyber warfare** occurred in Ukraine in 2015 and 2016, when Russian-backed hackers attacked the country's power grid, cutting electricity to hundreds of thousands of people in winter, marking the first known cyberattack to disable an energy network.[37] Similar operations have targeted Georgia, Moldova, and Montenegro, disrupting the regular functioning of state institutions, including core administrative processes and public service delivery. Beyond cyber warfare, Russia maintains military leverage through **separatist conflicts**, using its troops in Transnistria, Abkhazia, and South Ossetia to destabilise Moldova and Georgia while preventing their full Euro-Atlantic integration. However, the most direct form of coercive influence is **full-scale military aggression**, exemplified by Russia's 2022 invasion of Ukraine, which followed the 2014 annexation of Crimea and its large-scale armed conflict in Eastern Ukraine. Unlike hybrid operations or proxy conflicts, this represents an outright attempt to forcibly realign a neighbouring state's geopolitical course. This pattern reveals a clear trajectory—when Russia fails to achieve its objectives through formal diplomacy or indirect influence, it escalates to increasingly aggressive measures, ultimately resorting to full-scale war if the conditions, such as a shared border, allow for direct military action.

Based on the observed changes in the political influence sub-index values as well as the analysed patterns of influence, attempts of Russian political interference are likely to intensify, particularly in Georgia, where the government has been hesitant to counter Russian influence,[38] but also in the countries where Russia still holds comparatively higher levels of influence, despite a declining trend between 2018 and 2023—Moldova, Serbia, and Bosnia and Herzegovina. These three states remain particularly vulnerable, as they

[35] Paul Stronski/Annie Himes: Russia's Game in the Balkans, 6 February 2019, available at: https://carnegieendowment.org/research/2019/02/russias-game-in-the-balkans?lang=en (last accessed: 17.03.2025).
[36] Alice Taylor-Braçe: Albanian Political Parties Spar over Russian Funding Allegations, in: Euractiv, 15.09.2022.
[37] America's Cyber Defense Agency: Cyber-Attack Against Ukrainian Critical Infrastructure, 20 July 2021, available at: https://www.cisa.gov/news-events/ics-alerts/ir-alert-h-16-056-01 (last accessed: 17.03.2025).
[38] This analysis does not cover political developments in Georgia following the disputed parliamentary elections, including the protests and institutional backlash that emerged thereafter.

have historically served as strong footholds for Russian influence, and Moscow is unlikely to relinquish them without resistance. In this regard, operations such as strengthening ties with political actors, election interference, cyberattacks, and attempts to mobilise protests or social unrest can be expected.[39] However, whether this interference translates into tangible influence will largely depend on each country's ability to counter and mitigate increasing Russian meddling.

At the same time, the most overt forms of coercion—military threats—pose the greatest risk to Ukraine, Moldova, and Georgia, given their unresolved conflicts and proximity to Russian military forces. However, in the short term, the likelihood of direct Russian aggression in these states will largely depend on the outcome of the war in Ukraine. Should Russia regain strategic momentum, the risk of escalatory actions in these regions could increase significantly. Conversely, a prolonged or weakened Russian position in Ukraine may push Moscow toward more asymmetric and indirect means of influence, similar to those seen in the Balkans, where it still retains levers to obstruct Western integration and destabilise democratic processes.

Economic Influence: Evolution, Patterns, and the Economic Sub-Index (2013-2023)

Economic influence has long been one of Russia's most structurally entrenched tools of power projection. Across its neighbourhood and beyond, Moscow has leveraged energy dependence, targeted investments, and trade asymmetries to shape strategic outcomes.[40] In the Eastern Trio, this influence was historically deeper and more institutionalised—rooted in Soviet-era economic integration and reinforced through frameworks such as the Commonwealth of Independent States (CIS). In the Western Balkans, by contrast, Russia never established systemic economic dominance, but nonetheless replicated elements of its broader model: energy dependence as the core channel of influence, supported by episodic yet strategically placed investments in sectors like energy infrastructure, metallurgy, and banking. This approach mirrored patterns visible in several EU member states, where reliance on Russian oil and gas shaped national vulnerabilities and limited strategic autonomy. Taken together, these patterns reveal that Russia's economic presence, despite its uneven distribution, has played a strategic role in enabling and sustaining broader geopolitical influence across both regions.

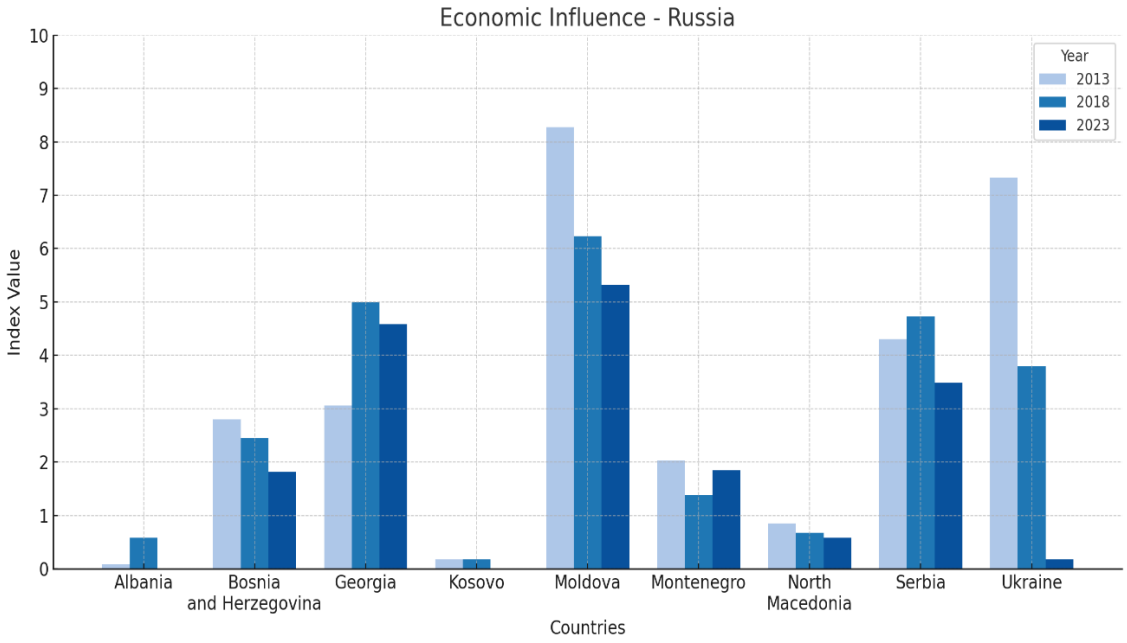
While the structure and logic of Russia's economic influence have remained consistent, their impact across the region has shifted significantly over the past decade**. As shown in Figures 3 and 4, Russia's economic influence in Eastern Trio and Western Balkan countries has generally declined in the period 2013-2023, though trends differ considerably**

[39] Similar operations can be expected in other Western Balkan countries as well, but they are unlikely to be Russia's primary focus, as these states are already less susceptible to its influence—either due to their NATO membership (Albania, North Macedonia, Montenegro) or because Russian influence has historically been minuscule (Kosovo).

[40] The full set of economic indicators reflecting Russia's projection of political power can be found in Annex I.

among individual states. Ukraine experienced the most dramatic shift, effectively reducing Russia's economic leverage to negligible levels by 2023, becoming economically independent from Moscow.[41] Moldova also significantly reduced its economic dependency over the same period; however, comparatively, it still remains the country most economically influenced by Russia in the region. Additionally, Serbia showed a clear downward trend compared to 2013, reflecting the country's gradual economic reorientation toward the EU following the entry into force of the Stabilisation and Association Agreement (SAA) in the same year, which strengthened trade and investment ties with EU member states at the expense of Russian economic influence. Conversely, Georgia stands out as an exception, displaying a moderate increase in Russian economic engagement over the decade. Bosnia and Herzegovina and Montenegro, while consistently maintaining relatively lower levels of Russian economic dependency, also followed a downward trajectory, reflecting the broader regional trend of reducing reliance on Moscow. Finally, Albania, North Macedonia, and Kosovo exhibited consistently negligible Russian economic influence throughout this period. Collectively, these trends underscore an overall regional movement away from Russia's economic orbit, although the persistence of Russian economic ties with countries like Moldova indicates continued potential leverage for Moscow.

Figure 3: The Economic Influence Sub-Index Over Time (2013-2023)



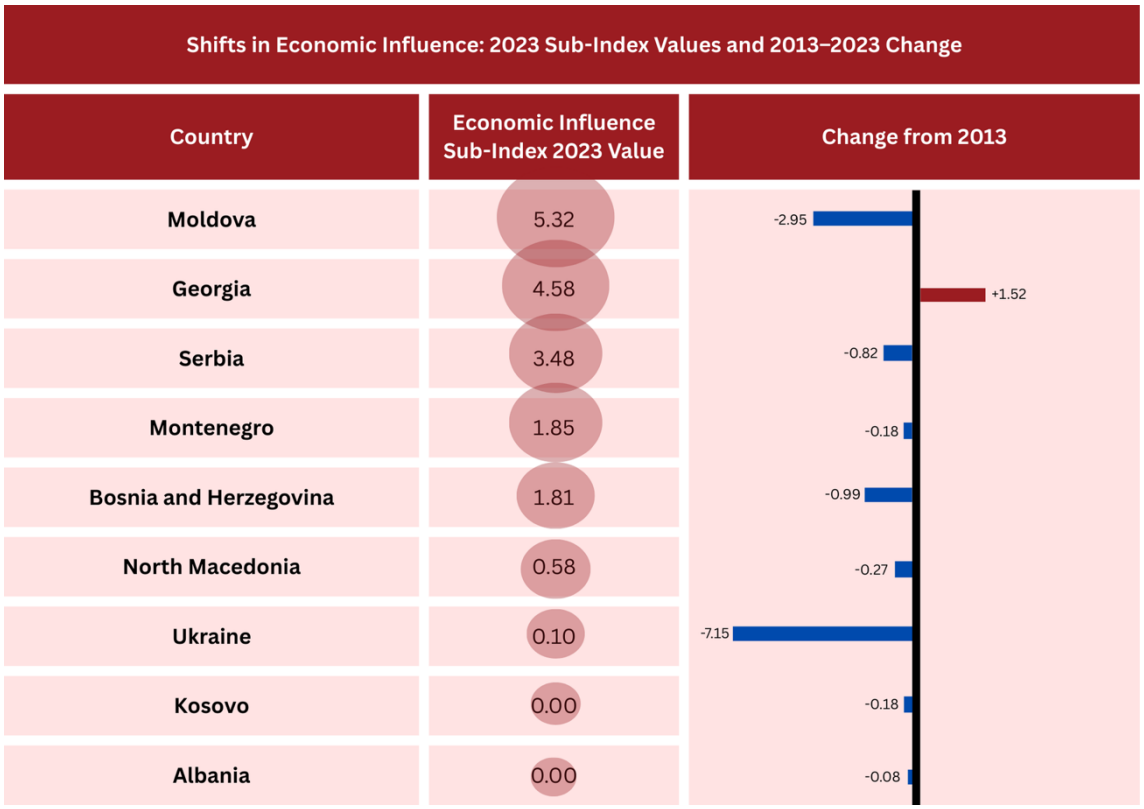
[41] While Ukraine has successfully eliminated its economic dependence on Russia in terms of trade, energy, and foreign investment, it is important to acknowledge that the country's economic devastation is a direct consequence of Russian aggression. The destruction of infrastructure, reduced industrial capacity, and overall wartime economic losses highlight that, despite severing economic ties, Russia's impact on Ukraine's economy remains significant, albeit in a wholly negative manner. However, as the economic influence index measures structural dependencies rather than economic devastation, Ukraine's near-zero score reflects its current lack of reliance on Russia rather than the broader economic damage inflicted by the war.

Russia exercises its economic influence in EU candidate countries through several interconnected mechanisms, primarily linked to strategic sectors. These mechanisms span energy supplies, targeted investments in critical industries, and specific trade arrangements. Although their relative importance and effectiveness vary between countries, together these economic instruments enable Russia to maintain influence in the region. Understanding these underlying mechanisms helps clarify Russia's continued capacity to shape economic and political dynamics, even amid broader trends of declining economic influence.

As a country rich in **natural resources**, Russia has historically leveraged its extensive reserves of gas and oil to exert significant political and economic influence over Eastern and Southeast European countries. Moldova, for instance, was entirely reliant on Russian gas supplied by Gazprom until late 2022.[42] Moreover, Russia has strategically used energy supplies to interfere politically in Moldova, notably by providing free gas to Moldova's breakaway region, Transnistria, effectively keeping it within Russia's political orbit.[43] Serbia similarly maintained substantial energy ties with Russia. In May 2022, following the onset of Russia's invasion of Ukraine, Serbia swiftly renewed its gas supply agreement with Gazprom for an additional three years under favourable conditions. This deal has been widely perceived as linked to Serbia's decision not to impose sanctions against Russia. [44] Moreover, Russia's influence in Serbia extends beyond gas; as of 2023, Gazprom Neft held a controlling stake in NIS, Serbia's largest oil company, further consolidating Russian economic and political leverage.[45] Bosnia and Herzegovina also relies entirely on Russian gas imports delivered through Serbia.[46] This sustained energy dependence has significantly constrained the foreign and domestic policy autonomy of these countries, effectively enabling Moscow to influence their geopolitical choices and meddle obstruct their full alignment with the West.

[42] Leah Kieff: An Energy Crisis Provides Opportunity in Moldova, Center for Strategic and International Studies, 7 January 2025, available at: https://www.csis.org/analysis/energy-crisis-provides-opportunity-moldova (last accessed: 17.03.2025).
[43] Vladimir Solovyov: Transnistria's Energy Crisis Could Backfire on Moscow, 11 January 2025, available at: https://carnegieendowment.org/russia-eurasia/politika/2025/01/moldova-gas-crisis-solution?lang=en (last accessed: 17.03.2025).
[44] Saša Dragojlo: Serbian PM Denies Gas Deal With Russia Linked to Sanctions, in: Balkan Insight, 30.05.2022.
[45] Georgi Gotev: US tells Serbia to Zero Out Russian Ownership of Largest National Oil Company, in: Euractiv, 14.01.2025.
[46] Paulina Wankiewicz: Bosnia & Herzegovina. Gas Disputes along Ethnic Lines, 6 April 2023, available at: https://www.osw.waw.pl/en/publikacje/analyses/2023-04-06/bosnia-herzegovina-gas-disputes-along-ethnic-lines (last accessed: 17.03.2025).

Figure 4: Economic Influence Sub-Index Values in 2023 Compared to 2013



In recent years, however, **accelerated diversification** initiatives across the region —often supported politically and financially by the EU—have begun to reduce these energy dependencies, significantly diminishing Russia's traditional leverage. Moldova's rapid response to Gazprom's supply cut in late 2022 demonstrates this trend vividly; the country swiftly secured alternative energy sources from Romania, dramatically reducing its historic reliance on Russian gas.[47] Similarly, Serbia is actively pursuing diversification strategies to mitigate potential risks associated with dependence on Russian supplies. Belgrade has constructed gas pipeline interconnectors with Bulgaria, which has enabled Serbia to access alternative sources, including Azerbaijani gas and liquefied natural gas (LNG) terminals.[48] North Macedonia is also moving towards energy independence by planning connections to Greek LNG infrastructure.[49] Bosnia and Herzegovina, despite ongoing dependence, is exploring connections to Croatia's expanding LNG terminal on the island of Krk, aiming to reduce reliance on Russian imports in the medium term.[50] Taken together, the convergence of these national

[47] Daniel F. Runde/Leah Kieff: Winter Is Coming for Moldova, 18 December 2023, available at: https://www.csis.org/analysis/winter-coming-moldova (last accessed: 17.03.2025).
[48] Brian F. G. Fabrègue: Interconnector Bulgaria-Serbia: Closer Ties with Azerbaijan and Resilient European Energy Markets, 15 March 2024, available at: https://www.blue-europe.eu/analysis-en/short-analysis/interconnector-bulgaria-serbia-closer-ties-with-azerbaijan-and-resilient-european-energy-markets/ (last accessed: 17.03.2025).
[49] Vladimir Spasić: Greece, North Macedonia Reach Final Investment Decision on Natural Gas Interconnector, in: Balkan Green Energy News, 30.10.2023.
[50] Wankiewicz: Bosnia & Herzegovina. Gas disputes along Ethnic Lines, 2023.

strategies marks an emerging regional consensus: energy security requires reduced exposure to Russian supply chains.

Beyond energy supply chains, Russian **foreign direct investment (FDI)** has been another critical pillar supporting Moscow's influence in the region, strategically targeting key sectors such as energy, infrastructure, banking, telecommunications, and heavy industry. Figure 5 provides country-specific data on the presence of Russian FDI across the region. Historically, Russia has employed investments by state-owned enterprises and politically affiliated oligarchic capital to gain economic footholds and secure political leverage. A notable example is Gazprom Neft's acquisition of a majority stake in Serbia's national oil company, NIS, granting substantial control over Serbia's energy sector (as described above).[51] Similarly, Zarubezhneft's ownership of the Brod oil refinery in Bosnia and Herzegovina has maintained a Russian presence in the country's energy sector, despite the refinery operating at a loss for years.[52] Montenegro experienced extensive Russian capital inflows in the late 2000s and early 2010s, particularly through oligarch Oleg Deripaska's investments in real estate, tourism, and the aluminum industry.[53] Notably, even in 2023, Russia remains Montenegro's second-largest single foreign investor, largely driven by the significant influx of Russian nationals following the onset of the Ukraine war.[54] However, the general long-term outlook for Russian FDIs appears to be shifting. Western sanctions have severely constrained Russian financial institutions such as Sberbank and VTB, compelling them to sell or withdraw their operations from the Western Balkans and significantly diminishing Russia's financial footprint.[55] Concurrently, alternative investors, particularly from China and the EU, have increasingly occupied this space, most visibly in Serbia, where Chinese investments have become prominent, especially in mining and infrastructure sectors. Although Russia's remaining strategic investments continue to afford Moscow meaningful influence, their overall leverage is clearly reduced compared to earlier peaks.

[51] Petra Cassata: Pipeline Politics: Gazprom Seals Serbia Deal, 29 December 2008, available at: https://www.atlanticcouncil.org/blogs/new-atlanticist/pipeline-politics-gazprom-seals-serbia-deal/ (last accessed: 17.03.2025).
[52] N1: Bosnia's Brod Oil Refinary Accumulates Debt Worth 677.9 Million Marks, 30.07.2019.
[53] Samir Kajosevic: Russian Oligarch's Compensation Case Against Montenegro "Rejected", in: Balkan Insight, 17.10.2019.
[54] Forbes Srbija: Srbija najveći investitor u Crnoj Gori u 2023. uprkos velikom padu ulaganja u tu zemlju, 08.04.2024.
[55] Maksim Samorukov: Surviving the War: Russia-Western Balkan Ties After the Invasion of Ukraine, 25 April 2023, available at: https://carnegieendowment.org/russia-eurasia/politika/2023/04/surviving-the-war-russia-western-balkan-ties-after-the-invasion-of-ukraine?lang=en (last accessed: 17.03.2025).

Figure 5: The Share of Russian FDI in Total Inflows and Inward Stock by Country (2013, 2018, 2023)[56]

	2013		2018		2023	
Country	FDI inflows (% of total FDI inflows)	FDI inward stock (% of total FDI inward stock)	FDI inflows (% of total FDI inflows)	FDI inward stock (% of total FDI inward stock)	FDI inflows (% of total FDI inflows)	FDI inward stock (% of total FDI inward stock)
Albania	0	0	0	0	0	0
BIH	-20.4	8.7	14.9	4.8	-3.5	2.3
Georgia	0.8	7.3	6.2	10	5.4	11.2
Kosovo	0	0	0	0	0	0
Moldova	/	24	/	22.5	/	15.3
Montenegro	39.1	13	12.7	11	18.3	12.6
North Macedonia	0.9	0.3	-1.2	0.4	-0.1	0.3
Serbia	12.3	4.4	7.6	4.8	3.6	5.6
Ukraine	/	7.4	9.6	2.7	-0.2	0

While foreign investment gave Russia long-term stakes in key industries, trade provided a more immediate and politically flexible means of exerting influence across its periphery. Given its vast consumer market and geographical proximity, Russia has historically been a natural **trading partner** for Eastern Trio and Western Balkan countries, enabling Moscow to strategically exploit these close economic ties to enhance its regional influence. Many countries in these regions directed substantial portions of their trade towards Russia, both in terms of exports and imports, relying on preferential market access secured through various Free Trade Agreements (FTAs). Serbia notably benefited from its longstanding bilateral FTA with Russia, which was expanded in 2019 to cover the entire Eurasian Economic Union (EAEU).[57] Moldova has participated in the CIS Free Trade Area Agreement with Russia since 2012, and the agreement remained in force as of 2023.[58] Ukraine was also part of this trade zone until 2016,[59] while Montenegro had a bilateral FTA with Russia until 2015.[60] Despite the initial economic advantages, trade links with Russia had significantly different implications across the region: for countries like Moldova and Ukraine, dependency on Russian trade proved geopolitically costly, while for Serbia and Montenegro, these connections were never critically influential, as stronger economic relations with Western markets provided greater long-term stability.

[56] Data are sourced from the WIIW (Vienna Institute for International Economic Studies) database to ensure cross-country comparability. The symbol "/" indicates that data were not available for the respective year.
[57] Milica Stojanović: Serbia Signs Trade Deal With Russia's Eurasian Union, in: Balkan Insight, 25.10.2019.
[58] World Trade Orgaization: Regional Trade Agreements Database, available at: https://rtais.wto.org/UI/CRShowRTAIDCard.aspx?rtaid=762 (last accessed: 17.03.2025).
[59] International Trade Administration: Ukraine Country Commercial Guide, 11 November, 2023, available at: https://www.trade.gov/country-commercial-guides/ukraine-trade-agreements (last accessed: 17.03.2025).
[60] European Commission: Montenegro 2015 Report, 2015.

While **trade agreements** initially served as tools of connectivity, Russia did not hesitate to repurpose them as **levers of coercion** once countries moved closer to the West. After Montenegro joined EU sanctions against Russia in 2014, Moscow promptly terminated their bilateral FTA, severely disrupting Montenegrin agricultural exports.[61] Moldova and Ukraine similarly faced harsh trade restrictions after signing EU Association Agreements in 2014, leading to extensive Russian bans on Moldovan wine, fruits, and agricultural products,[62] as well as numerous Ukrainian exports.[63] Earlier, Georgia faced comparable Russian embargoes, notably the 2006 ban on Georgian wine and mineral water, intended to punish Tbilisi's pro-Western orientation.[64] Although these restrictions were gradually lifted from 2013 onwards, their prolonged impact throughout the early 2010s significantly shaped Georgia's subsequent efforts toward market diversification. These coercive actions accelerated trade diversification away from Russia across the region: Moldovan exports to Russia plummeted dramatically from nearly 30% in the early 2010s to under 4% by 2023, while Ukraine's exports to Russia, comprising around 24% in 2013, essentially ceased by 2023. [65] Georgia also successfully diversified its markets, significantly reducing its dependency on Russian consumers.[66] Collectively, these developments highlight a pronounced regional shift away from Russian economic influence, as Eastern Trio and Western Balkan countries increasingly prioritise economic integration with the EU and other Western partners.

In light of these evolving dynamics, **Russian economic leverage across the nine EU candidate countries is expected to decline further in the coming years. This trajectory reflects not only the cumulative effects of past shifts—such as the erosion of trade ties and the contraction of Russian investments—but also ongoing structural changes, including energy diversification, Western sanctions, and deeper regulatory alignment with the EU.** However, states historically more dependent on Russian economic ties—especially Moldova and Serbia—will likely remain susceptible to targeted Russian economic influence efforts. In these countries, Moscow will probably strive to retain its remaining footholds, particularly through continued strategic investments, selective use of trade agreements, and maintaining residual energy dependencies. By contrast, countries such as North Macedonia and Montenegro have gradually reduced their exposure through proactive market reorientation, while Ukraine, under the pressure of war, has effectively severed most formal economic ties with Russia. Still, the sustainability of this regional trend will depend on the depth of domestic reforms, the consistency of Western support, and the political will to resist re-entrenchment. Ultimately, Russia's future economic role in the region is likely to shift increasingly towards selective and indirect forms of influence rather than overt

economic dominance, adapting to a landscape characterised by decreasing dependency and intensified regional integration with the West.

[61] European Commission: Montenegro 2015 Report, 2015.
[62] Euractiv: Russia Imposes "Temporary Ban" on Moldovan Fruits, 22.07.2014.
[63] BBC: Russia Hits Ukraine with Trade Aanctions over EU Deal, 21.12.2015.
[64] Giga Abuseridze: Trade war: Georgia vs. Russia, in: Socrates, 3 (18), 2020.
[65] Wiiw: Wiiw Annual Database, available at: https://wiiw.ac.at/annual-database.html (last accessed: 17.03.2025).
[66] Abuseridze: Trade war: Georgia vs. Russia, 2020.

Societal Influence: Evolution, Patterns and the Societal Sub-Index

The effectiveness and form of Russia's societal influence must be understood in light of the distinct historical trajectories of the analysed countries. In the Eastern Trio region, Russia draws upon deep-rooted cultural, linguistic, and demographic linkages inherited from the Soviet era, which continue to facilitate its soft power projection. In contrast, the Western Balkan countries did not experience Soviet rule: most were part of non-aligned Yugoslavia, which maintained its independence from both blocs, while Albania actively distanced itself from Moscow after the 1960s. This lack of direct Soviet domination meant that societal ties with Russia were historically weaker. However, it also created space for a symbolic idealisation of Russia—as a historic friend, cultural ally, or protector of Orthodoxy—especially among certain political and religious actors. As a result, Russia's societal influence in both regions operates through adaptable mechanisms calibrated to each national context. These include mobilising diaspora and Russian-speaking communities, reinforcing ideological and religious ties through the Russian Orthodox Church and its local counterparts, disseminating pro-Kremlin narratives via traditional and digital media, and sustaining influence through cultural diplomacy, scholarships, and language programmes. These instruments are strategically deployed to exploit specific societal vulnerabilities—such as weak media ecosystems, polarised identities, or unresolved historical grievances—thus maximising Russia's resonance within each local context.

In pursuing its broader geopolitical agenda, Moscow has invested in societal influence as a key vector of engagement, resulting in varied patterns across the region shaped by both its strategic intentions and the consequences of its interventions.[67] As shown in Figures 6 and 7, Russia's societal influence across the region between 2013 and 2023 proved largely resilient, with only one major exception. In Ukraine, a sharp and inevitable collapse occurred in response to Russia's annexation of Crimea and the beginning of its war against Ukraine in 2014, followed by the full-scale invasion in 2022. Conversely, the most pronounced increase occurred in Serbia, particularly from 2018 onward, as Russian narratives gained traction through extensive media presence, cultural initiatives, and political partnerships that aligned with segments of the Serbian public and elite. Crucially, this expansion was not merely incidental but an expected outcome of Russia's deliberate strategy to amplify its soft power in Serbia as a means of indirectly influencing Bosnia and Herzegovina, Montenegro, and Kosovo through their ethnically Serbian population. A significant increase was also noted in North Macedonia, largely driven by the normalisation of relations between the Russian and Macedonian Orthodox Churches. A slight rise was observed in Albania and Kosovo—traditionally resistant to Russian influence—mostly due to the growing availability of Russian media content and narratives in local information ecosystems. In contrast, Moldova registered a modest decline, reflecting its increasing Western alignment, while Montenegro, despite a slight dip after 2018, retained a largely stable level of Russian societal influence with only minimal fluctuations. Overall, the durability of Russia's societal presence in many countries suggests that soft power influence—unlike political or economic ties—is often more deeply embedded and resistant to short-term disruption.

[67] The full set of societal indicators reflecting Russia's projection of political power can be found in Annex I.

Figure 6: The Societal Influence Sub-Index Over Time (2013–2023)

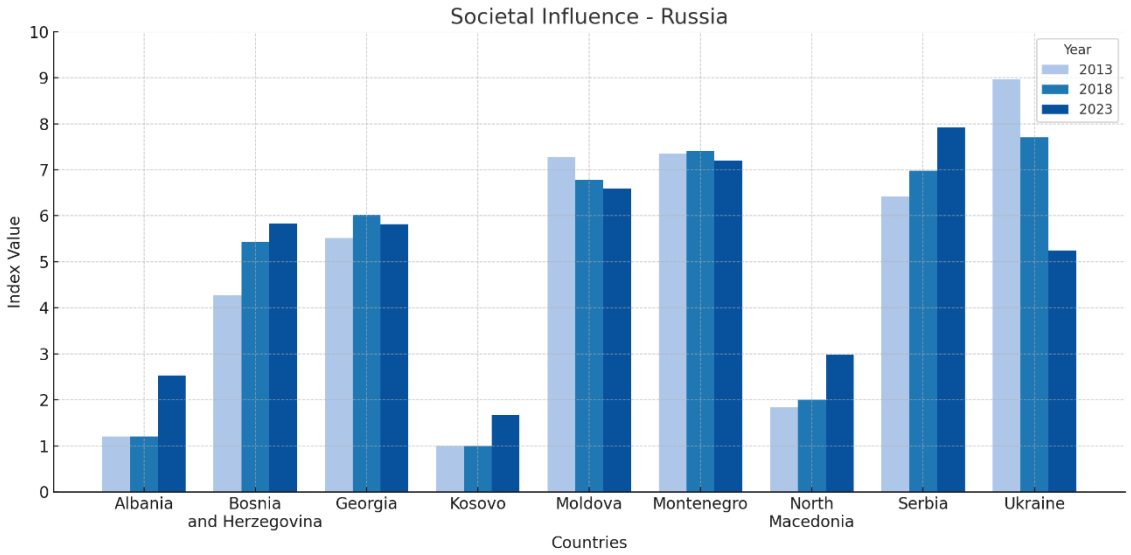


Figure 7: Societal Influence Sub-Index Values in 2023 Compared to 2013

Shifts in Societal Influence: 2023 Sub-Index Values and 2013–2023 Change

Country	Societal Influence Sub-Index 2023 Value	Change from 2013
Serbia	7.92	+1.50
Montenegro	7.20	-0.15
Moldova	6.60	-0.68
Bosnia and Herzegovina	5.83	+1.56
Georgia	5.82	+0.30
Ukraine	5.25	-3.72
North Macedonia	2.98	+1.15
Albania	2.53	+1.33
Kosovo	1.67	+0.67

Relying on the enduring legacy of the USSR in Eastern Trio countries, Moscow systematically leverages **ethnic Russian and Russian-speaking communities** abroad as instruments of geopolitical influence, using them to maintain political leverage, justify interventions, and sustain regional dominance. A central tactic is "passportisation"—the mass distribution of Russian citizenship to populations in contested regions. By 2008, 90% of South Ossetians and 85% of Abkhazians in Georgia held Russian passports, while in Moldova's breakaway Transnistria, roughly 250,000 residents (half the population) acquired citizenship by the late 2010s.[68] Moscow frames these individuals as "compatriots" requiring protection, a pretext deployed to legitimise military actions, such as the 2014 annexation of Crimea and support for separatists in eastern Ukraine. These operations were justified by claims of defending Russian speakers from "Ukrainian nationalist threats". Pro-Kremlin sentiment is further cultivated through state-aligned media, which dominate information ecosystems in these communities. In Moldova's autonomous Gagauzia—a Turkic but Russophone region—98% voted against EU integration in a 2014 referendum, opting instead for Russia's Eurasian Union. Pro-Russian actors amplified fears of Romanian assimilation to sway the region against Moldova's pro-Western government.[69] Similarly, in Ukraine, Russian-speaking electorates in the east and south historically backed pro-Moscow parties, anchoring Ukraine within Russia's orbit until the 2014 revolution. Post-2014, Moscow exploited these networks to administer occupied Crimea and Donbas, using local proxies to legitimise its authority.[70] The strategy of framing interventions as "protection" of diaspora rights enables Moscow to manipulate domestic politics, destabilise regions, and redraw borders—all while mobilising its cultivated "grassroots" support base.

In parallel with its use of ethnic and linguistic communities, Russia strategically cultivates a **conservative, traditionalist identity**—particularly as a means of penetrating Western Balkan societies, where large Russian-speaking populations are largely absent. By positioning itself as the protector of Orthodox civilisation, Moscow frames this identity as a counterweight to the Western socio-liberal order. This carefully crafted image, reinforced at home, is exported through the **Russian Orthodox Church** (ROC), which serves as Moscow's key instrument for promoting religious conservatism. In the Balkans, the ROC cultivates deep ties with the Serbian Orthodox Church (SOC), reinforcing narratives of Slavic unity and mutual destiny. Russian oligarchs like Konstantin Malofeev finance charities in Serbia, Republika Srpska, and Montenegro, propagating the notion of a spiritual alliance against Western "decadence".[71] Meanwhile, local Orthodox hierarchies amplify Kremlin interests by obstructing Western integration. In Montenegro, the SOC spearheaded mass protests against

[68] Jakub Lachert: Russia Hands Out Passports to Its Diaspora, 18 February 2020, available at: https://warsawinstitute.org/russia-hands-passports-diaspora/ (last accessed: 17.03.2025).
[69] Radio Free Europe/Radio Liberty: Gagauzia Voters Reject Closer EU Ties For Moldova, 03.02.2014.
[70] International Crisis Group: Rebels Without a Cause: Russia's Proxies in Eastern Ukraine, 16 July 2019, available at: https://www.crisisgroup.org/europe-central-asia/eastern-europe/ukraine/254-rebels-without-cause-russias-proxies-eastern-ukraine (last accessed: 17.03.2025).
[71] Zweers/Drost/Henry: Little Substance, Considerable impact. Russian Influence in Serbia, Bosnia and Herzegovina, and Montenegro, 2023.

NATO membership, framing it as a betrayal of Orthodox identity.[72] Furthermore, across the region, Orthodox clergy actively oppose minority rights and gender equality,[73] often portraying Russia as a model where "Putin got it right" by banning Pride events and restricting social liberties in this regard. In that way, Russia's carefully constructed ideological framework, rooted in religious conservatism, provides a consistent narrative that shapes its messaging across the region. By embedding its geopolitical ambitions within a moral and spiritual discourse, Moscow ensures that every public message—whether disseminated through media, cultural diplomacy, or religious institutions—can be framed as preserving "traditional values" as opposed to the "decadent" West.

Complementing its identity-based and ideological strategies, the Kremlin conducts **sophisticated information warfare** across the two regions, using state media, proxy news sites, and social media to spread locally tailored disinformation. By adapting narratives to national contexts—historical grievances, ethnic tensions, and language—Russia maximises its influence while maintaining deniability through seemingly independent local media partners. Russia's state-funded media, RT and Sputnik, have expanded their presence, with Sputnik Serbia (since 2015) and RT Balkan (since 2022) serving as regional Western Balkan hubs for Kremlin propaganda, with a readership in Bosnia and Herzegovina, Montenegro, Kosovo, and North Macedonia.[74] In Serbia, Russian narratives heavily exploit memories of the 1999 NATO bombing, framing the war in Ukraine as a continuation of resistance against Western aggression. Kremlin-aligned media portray Russia's invasion as a justified retaliation against the same NATO forces that, according to this narrative, unlawfully attacked Serbia in the past. This messaging reinforces anti-Western sentiment and strengthens Russia's image as Serbia's historical ally against the West.[75] In Bosnia and Herzegovina, Russian-linked media manipulated the trauma of the 1990s war by equating the situation in eastern Ukraine with the threats that Bosniak forces faced during the Bosnian War, portraying Russia's invasion as a humanitarian intervention to prevent genocide, similar to Srebrenica in 1995.[76] In Georgia, Kremlin-aligned outlets stoked fears that NATO membership would drag the country into war with Russia, reviving anxieties from the 2008 conflict.[77] In Moldova, disinformation spread the notion that EU integration would lead to the country's forced unification with Romania, playing on long-standing fears among Russian-speaking communities.[78] By

[72] Dušica Tomović: Anti-NATO Montenegrins Hold New Year "Protest Party", in: Balkan Insight, 14.01.2016.
[73] Safia Swimelar: LGBT Rights in the Balkans. Assessing Two Decades of Change and Nationalist Challenges, 28 february 2023, available at: https://blogs.lse.ac.uk/europpblog/2023/02/28/lgbt-rights-in-the-balkans-assessing-two-decades-of-change-and-nationalist-challenges/ (last accessed: 17.03.2025).
[74] Reporters Without Borders: From Russia to Serbia. How RT spreads the Kremlin's propaganda in the Balkans despite EU sanctions, available at: https://rsf.org/en/russia-serbia-how-rt-spreads-kremlin-s-propaganda-balkans-despite-eu-sanctions (last accessed: 17.03.2025).
[75] ISAC Fund: Regional Analysis of Narrative "Kremlin and Pro-Kremlin False Narratives Regarding the Ukraine War – in the Western Balkans", 22 November 2022, available at: https://www.isac-fund.org/en/news/regional-analysis-of-narrative-kremlin-and-pro-kremlin-false-narratives-regarding-the-ukraine-war-in-the-western-balkans (last accessed: 17.03.2025).
[76] Irvin Pekmez: Russia Targets Bosnia With Disinformation About Ukrainian War, in: Balkan Insight, 09.05.2022.
[77] Eto Buziashvili: Russia is Directly and Indirectly Meddling in Georgia's Upcoming Election, 23 October 2024, available at: https://www.atlanticcouncil.org/blogs/new-atlanticist/russia-is-directly-and-indirectly-meddling-in-georgias-upcoming-election/ (last accessed: 17.03.2025).
[78] Piotr Garciu: Russian Propaganda Dominates Moldova's Gagauzia, 3 October 2022, available at: https://iwpr.net/global-voices/russian-propaganda-dominates-moldovas-gagauzia (last accessed: 17.03.2025).

infiltrating national media systems and amplifying divisive narratives, Russia erodes trust in independent journalism, polarises societies, and obstructs NATO and EU aspirations, ensuring continued strategic leverage in the region.

As part of its broader narrative strategy, **Russia also targets public disillusionment with the EU accession process in the Western Balkans**—a theme less rooted in fabricated disinformation, and more in the strategic amplification of existing frustrations. The data shows that skepticism toward EU accession is widespread in the region. **On average, nearly half of the respondents either doubt it will ever happen or believe it will be delayed beyond 2040, while only one-fifth of the region's population believe accession could occur by 2030. Serbia stands out as the most skeptical, with over half of its population expressing doubt or uncertainty and only 7% believing the country could join by 2030**.[79] Russia does not invent this scepticism; rather, it amplifies its implications, using it as a platform to undermine trust in the EU's long-term intentions and portray the enlargement process as stalled, insincere, or selectively enforced. Prior to the geopolitical shock of 2022 and the renewed momentum for enlargement, many scholars and policy experts openly questioned the credibility of the EU's commitment to the Western Balkans, citing years of enlargement fatigue, political blockages, and inconsistent messaging from Brussels.[80] Russia exploits this vacuum of credibility, reinforcing narratives that present the EU as disinterested or elitist, while positioning Moscow as a more dependable and culturally attuned partner—one that does not demand painful reforms in exchange for long-term rewards, in the region often perceived as uncertain.

While media manipulation and religious networks represent Russia's most assertive tools of societal influence, its **cultural diplomacy and educational outreach** remain comparatively underdeveloped. However, these efforts have steadily expanded between 2013 and 2023, reinforcing Moscow's presence in the region by promoting Russian heritage, language and culture. Through institutions like Russkiy Mir and Rossotrudnichestvo, Moscow funds a network of "Russian Houses" across post-Soviet states and the Balkans, blending language courses, art exhibitions, and WWII commemorations to promote its cultural legacy.[81] Academic ties deepen this soft-power ecosystem: scholarships lure Balkan and Eastern European students to Russian universities, fostering pro-Moscow alumni networks.[82] By positioning itself as a cultural benefactor rather than a political actor, Russia nurtures grassroots affinity among elites and youth, shaping perceptions of its role from "meddling power" to "trusted ally".

Looking ahead, Russia's societal influence in Eastern Europe and the Western Balkans is likely to intensify through hybrid strategies that exploit cultural affinities and systemic vulnerabilities. If EU and NATO integration efforts face local scepticism or stagnation, Moscow will continue to deepen its soft-power foothold by co-opting Orthodox

[79] Regional Cooperation Counci: Balkan Public Barometar Database, available at: https://www.rcc.int/balkanbarometer/results/2/public (last accessed: 15.04.2025).
[80] European Stability Initiative: Hamster in the Wheel - Credibility and EU Balkan policy, January 2020, availabale at: https://www.esiweb.org/publications/hamster-wheel-credibility-and-eu-balkan-policy (last accessed: 15.04.2025).
[81] Andriy Avremenko: Cultural Diplomacy as a Weapon of the Kremlin, 17 July 2024, available at: https://ruinfocrimes.com.ua/en/analytic/cultural-diplomacy-weapon (last accessed: 17.03.2025).
[82] RACUS: Scholarships, available at: https://edurussia.ru/scholarships/ (last accessed: 17.03.2025).

institutions to legitimise anti-Western narratives, promoting Russian language, and leveraging alumni networks of Kremlin-funded scholarships to cultivate pro-Russian elites. In Moldova and Georgia, where EU aspirations clash with entrenched pro-Russian constituencies, Russia may intensify cultural outreach to influence electoral outcomes, framing Euro-Atlantic integration as a threat to national identity. Serbia and Republika Srpska will remain key strongholds, with Russian-backed NGOs and media reinforcing pan-Slavic solidarity and exploiting unresolved ethnic tensions to destabilise governments. However, Russia's influence may encounter resistance: growing grassroots pushback against foreign interference (as seen in Ukraine's post-2014 cultural decolonisation), increased governments' scrutiny of Kremlin-linked organisations, and generational shifts towards cosmopolitan values. Yet, Moscow's adaptability—shifting from overt propaganda to more subtle, algorithm-driven disinformation—ensures its societal leverage will persist.

Overall InvigoratEU External Influence Index: General Trends of Russian Influence

The **InvigoratEU External Influence Index** represents the arithmetic mean of three sub-indices—measuring political, economic, and societal influence—and serves as a comprehensive **metric** (0-10 scale) designed to capture the overall trajectory of Russian influence across the analysed EU candidate countries. Upon quantification, the level of influence is divided into five categories—from *Very Low* to *Very High*—based on their index score, reflecting the depth and impact of Russian involvement in national affairs (see Figure 8). By aggregating data from these three dimensions, the index offers a holistic understanding of how Russian leverage has evolved over time, identifying both general trends and country-specific deviations.

Figure 8: Categorisation of Russian Influence by *InvigoratEU External Influence Index* Score

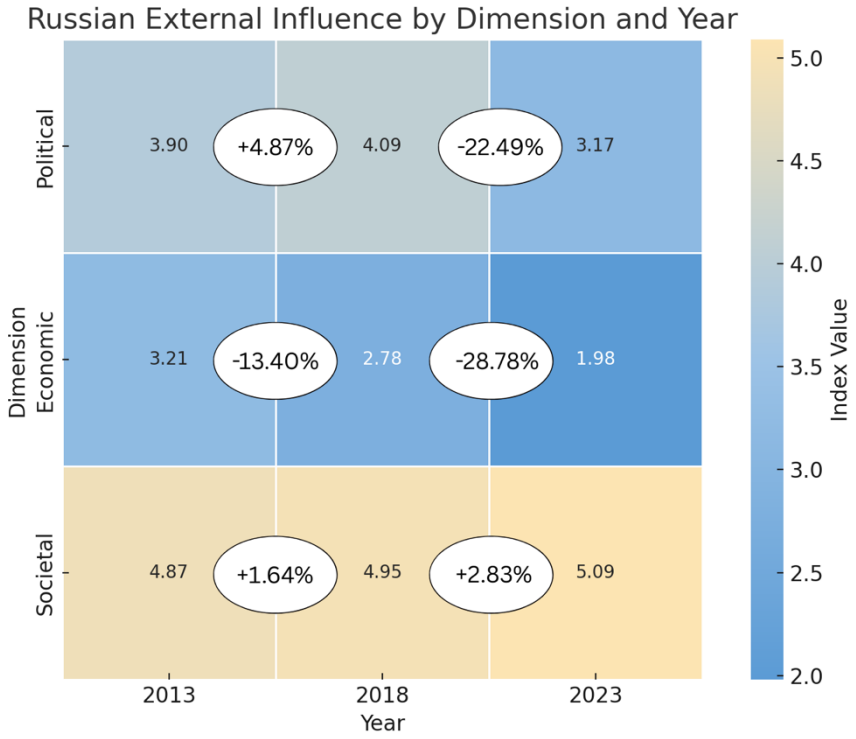
Index Range	Influence Category	Description
0.0 – 1.9	**Very Low**	Little to no evidence of Russian political, economic, or media presence.
2.0 – 3.9	**Low**	Some indicators of Russian engagement, but limited impact on national affairs.
4.0 – 5.9	**Moderate**	Noticeable influence across sectors, but not dominant or structurally embedded.
6.0 – 7.9	**High**	Strong Russian presence in key areas; influence is persistent and strategic.
8.0 – 10.0	**Very High**	Deep and pervasive Russian involvement shaping policy, economy, and discourse.

Rather than manifesting evenly, Russian influence across the region has evolved in markedly different ways depending on the domain. As visualised in Figure 9, the

aggregated index values per dimension (political, economic, and societal) over time reveal diverging trajectories and expose the areas where Russia's leverage has either persisted or eroded.

Figure 9: Aggregated Russian Influence Index by Dimension and Year (2013–2023)

The heatmap displays arithmetic means of country-level index scores across political, economic, and societal dimensions, offering a composite view of regional trends over time.



The following breakdown unpacks the trends by dimension, pointing to the specific ways in which Russian influence has shifted over time:

- **Political influence peaked in 2018, before falling sharply by 2023** (−22.49% compared to 2018), moving the dimension into the *low influence category* on average. This reflects a shift away from formal bilateral cooperation and a weakening of ties with pro-Russian political actors—particularly in the wake of growing Euro-Atlantic alignment and public pressure following Russia's militarised foreign policy.
- **Economic influence** followed a **more linear and dramatic decline**: dropping by −13.40% between 2013 and 2018 and a further −28.78% by 2023. This plunge reflects both regions' increasing energy diversification, exposure to EU markets, and the broader financial decoupling from Moscow post-2014 and especially post-2022. As of 2023, average scores in this dimension place it *at the upper bound of* the *very low category*.
- By contrast, **societal influence displays continuity and even subtle growth**: a cumulative +4.55% increase over the ten-year period. Averaging above 5.0 in 2023,

this dimension remains *in the moderate influence category* and constitutes **the most stable form of Russian presence in the region**. This persistence is largely driven by Orthodox religious networks, media penetration, cultural diplomacy, and soft-power narratives that continue to find resonance in parts of the Western Balkans and the Eastern Trio.

Taken together, these dynamics suggest that Russia's strategic footprint is not simply shrinking — it is mutating. While formal mechanisms of influence—economic and political ties—are visibly retracting, societal tools endure, allowing Russia to maintain a latent, value-based presence beneath the surface of official policies. **The battleground has shifted from corridors of power to citizens' hearts and minds.**

Figure 10: Shifts in Russia's *InvigoratEU External Influence Index* Across the Region (2013–2023)

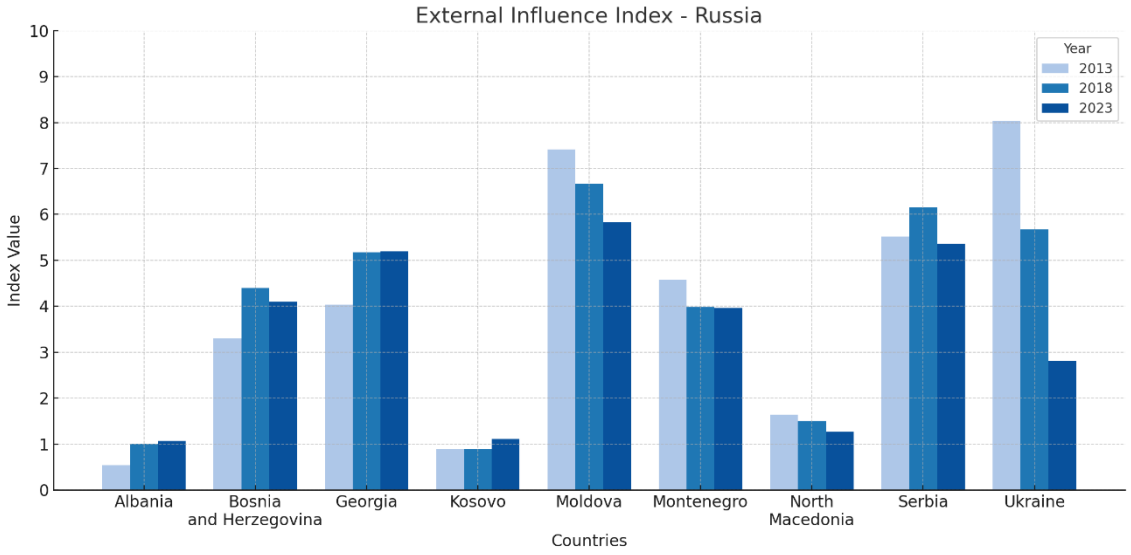
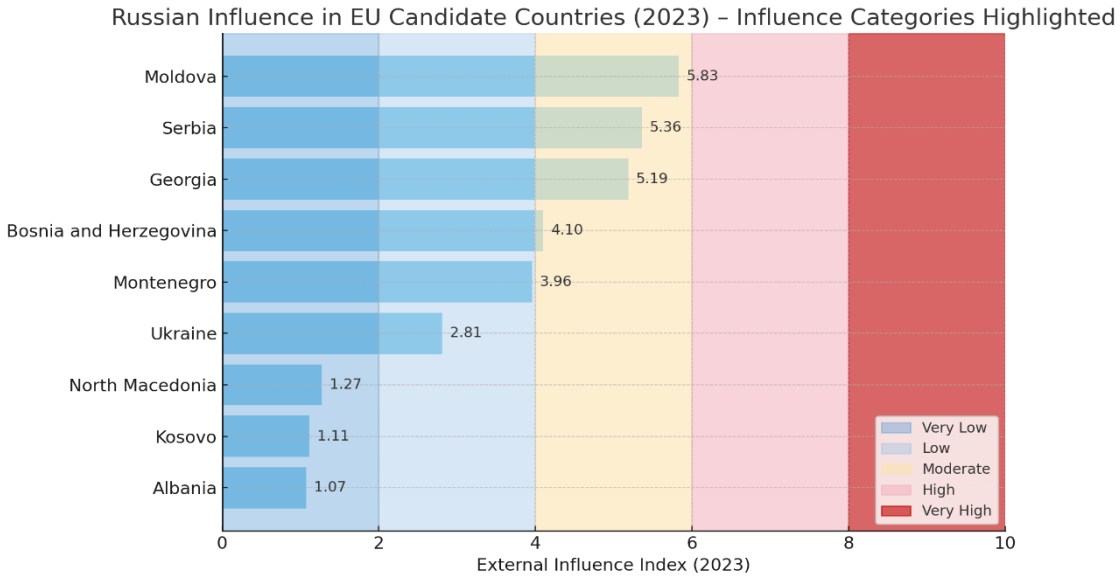


Figure 11: Country-Level 2023 Scores of Russian Influence in EU Candidates, Colour-Coded by Influence Intensity



Building on the outlined sectoral dynamics, a closer look at country-specific trajectories helps illuminate how different states either resisted or absorbed Russian influence over time. Figures 10 and 11 illustrate the country-specific dynamics of Russian influence—both across the full 2013–2023 period (Figure 10) and in the latest reference year, 2023 (Figure 11). While some countries exhibit long-term consistency, others have experienced sharp fluctuations, especially in response to geopolitical shocks. The categorisation framework introduced earlier (*Very Low*, *Low*, *Moderate*, *High*, and *Very High*) is suitable for interpreting these values not only as raw scores, but as qualitatively distinct levels of vulnerability or insulation from Russian leverage.

- **Albania, Kosovo, and North Macedonia** – All three countries are *firmly in the very low influence* category in 2023, consistent with their historical positioning. These countries have shown no significant fluctuations over time. Their firm Euro-Atlantic alignment, combined with the absence of deep historical or economic ties with Russia, has resulted in minimal exposure to Moscow's leverage.

- **Montenegro** – With a 2023 score just under 4.0, Montenegro is positioned at the *upper end of the low influence category*. Russian influence has slightly declined, particularly following its NATO accession in 2017 and the strengthening of pro-EU policies. However, pro-Russian narratives remain relatively strong, largely due to the historically close ties between the Montenegrin and Russian people. Despite this, Montenegro is the closest among the candidate countries to EU membership, which naturally contributes to a gradual decline in Russian influence.

- **Bosnia and Herzegovina** - With a score hovering just above 4.0, Bosnia and Herzegovina sits at the *lower margin of the moderate category*, reflecting a complex and internally divided landscape. While there has been a slight decline in overall influence since 2018, levels remain higher than in 2013, largely due to Russia's support

for the Republika Srpska leadership. Moscow leverages historical ties and ethno-political narratives to deepen existing fractures and obstruct Bosnia and Herzegovina's Euro-Atlantic integration.

- **Serbia** – Situated *in the mid-to-upper range of the moderate influence category*, Serbia remains one of the both regions' most exposed states. Russian influence continuously grew from 2013 up until the start of the war in Ukraine, after which it declined to a level slightly lower than in 2013, though it remains significantly high. This is a critical finding, as it suggests that without the war in Ukraine, Russian influence in Serbia would likely have continued growing. Instead, despite being the only country in the region that has not imposed sanctions on Russia, Serbia has taken steps toward political distancing, including the complete cessation of military cooperation with Moscow and the development of infrastructure for energy diversification.
- **Georgia**[83] – Georgia falls *in the mid-range of the moderate influence category*, with scores reflecting a slow but steady increase in Russian leverage. Russian influence has increased, primarily driven by closer political ties between the ruling government and the Kremlin. Despite public support for European integration, Georgia's ruling party, *Georgian Dream*, has maintained ambiguous relations with Moscow, allowing Russian leverage to expand. This is reflected in the government's refusal to impose sanctions on Russia and political rhetoric that echoes Kremlin narratives, often portraying Western actors as destabilising forces in Georgian domestic affairs.
- **Moldova** – Positioned *at the upper threshold of the moderate influence category*, Moldova records the highest level of Russian influence among all countries. Russian influence has been in continuous decline, yet it remains significantly higher compared to most other states. Moldova has actively pursued energy diversification and pro-EU policies, however, Moscow retains influence through societal and informal political networks. Russian-backed political parties, propaganda campaigns, and support for the separatist region of Transnistria ensure that Moldova remains vulnerable to external pressure despite its clear pro-European trajectory.
- **Ukraine** – With a 2023 score *in the low influence category*, Ukraine has undergone the most drastic and deliberate decoupling from Russian influence. Since 2014, and especially after 2022, Ukraine has decisively severed nearly all political and economic ties with Moscow, making it the most resistant country to Russian influence in the region. The shift has been accompanied by large-scale de-Russification efforts, such as restricting Russian media, banning pro-Kremlin political parties, and removing Soviet-era cultural and historical symbols. These policies, alongside military and economic integration with Western allies, have reinforced Ukraine's geopolitical realignment toward the West.

[83] While this analysis is methodologically limited to developments up to the end of 2023, it is important to acknowledge the significant political shifts in Georgia since then. In late 2024, the government announced a suspension of EU accession efforts until 2028, sparking mass protests and a crackdown on civil society. In April 2025, new legislation restricting foreign funding to local organisations was adopted, which is a clear sign of further democratic backsliding. Although not directly orchestrated by Moscow, these moves align with Russian narratives that frame EU integration as destabilising—suggesting a growing susceptibility to Russia's strategic influence.

In general, **the data suggests that structural factors—such as EU accession progress, energy diversification, and institutional resilience—correlate strongly with reduced Russian influence**. Conversely, **internal political fragmentation (e.g., Bosnia and Herzegovina) or deliberate diplomatic ambiguity (e.g., Georgia, Serbia) create openings for Moscow to sustain or expand its role**. The two regions' trajectory underscores how major geopolitical shocks can serve as catalysts for either deeper alignment with the West or increased vulnerability to external influence, depending on the domestic political response and the overall resilience of societies.

5 Key Findings

One or Two Theatres? The Dual Fronts of Russian Influence

The foundational drivers of Russian influence differ markedly between the Eastern Trio and Western Balkans, shaping Moscow's distinct ambitions and prioritisation of tactics. In the Eastern Trio, influence is entrenched—rooted in historical dominance, linguistic ties, and unresolved territorial conflicts (Crimea, Donbas, Transnistria, Abkhazia, South Ossetia). These frozen conflicts act as control mechanisms, enabling Russia to weaponise security dilemmas, destabilise governance, and establish political proxies. The Western Balkans, by contrast, represent a subtler battleground. In Western Balkan countries where it exists, pro-Russian sentiment is more abstract, as there has never been the same level of political or societal identification with Russia as seen in post-Soviet states. Unlike in the Eastern Trio, Russia does not directly participate in territorial disputes and does not pose a direct military threat. Instead, it pivots to amplifying internal fractures: fuelling ethnonationalist tensions in Bosnia and Herzegovina, backing anti-NATO narratives in Serbia, and undermining reformist efforts in Montenegro. Crucially, while in the Eastern Trio Moscow seeks to position itself as the sole controlling force, in the Western Balkans its strategy is geared toward disruption—delaying Euro-Atlantic integration by exploiting governance vacuums and identity politics.

While Russia's ambitions differ between the Eastern Trio and the Western Balkans, the core tactics remain structurally similar. Moscow employs a combination of political, economic, and societal tools – tailoring them to local vulnerabilities but retaining their foundational mechanics. Key dimensions include:

- **Political infiltration**: Pro-Kremlin parties, oligarchic networks, and compromised officials serve as intermediaries, obstructing reforms and amplifying anti-Western narratives. These networks operate largely informally, creating the paradoxical situation where governments pursue pro-Russian policies despite having formally severed diplomatic ties with Moscow, as seen in the case of Georgia.
- **Economic coercion**: Asymmetric trade dependencies – including preferential gas pricing for allies versus punitive tariffs for "defiant" states – are leveraged alongside weaponised Free Trade Agreements (FTAs) and targeted sanctions (e.g., Georgian wine, Ukrainian agriculture). Although Europe's energy diversification has reduced Russia's monopoly, Moscow exploits residual economic dependencies to destabilise pro-Western governments.

- **Societal engineering**: Russia sustains its influence through identity politics, religious networks, and media manipulation. The Russian Orthodox Church and its connections with local Orthodox churches play a pivotal role, reinforcing Kremlin-aligned narratives. Moscow promotes traditionalist values as a counterweight to the West, portraying itself as the defender of Slavic and Orthodox identity. Through state-controlled media, disinformation campaigns, and pro-Russian influencers, it fuels Euroscepticism and societal divisions, undermining public support for European integration.

This modular approach – repurposing the same core tools into varying configurations – enables Russia to pursue hegemonic ambitions in the Eastern Partnership while acting as a disruptor in the Western Balkans, all without the need to devise entirely new tactics.

The Paradox of Russian Waning Influence

Russia's political and economic influence has been on a declining trajectory across most EU candidate countries, with Western sanctions, economic decoupling, and energy diversification loosening its historical dominance over strategic sectors and elite policymaking. **Yet this retreat contrasts starkly with its stubborn – and in some cases growing – foothold in the societal sphere, where Moscow's influence persists or even expands**, exploiting cracks in media landscapes, cultural identity, and collective memory.

This divergence signals a strategic pivot. As Russia loses leverage over corridors of power, it is doubling down on societal disruption as a fallback strategy. Through state-aligned media, religious networks, and weaponised history, Moscow sows polarisation, exacerbates identity-driven tensions, and nurtures scepticism toward Western institutions. Crucially, the goal is not always to convert populations into pro-Russian advocates but to corrode trust in the EU and NATO, creating fertile ground for inertia or dissent that complicates Euro-Atlantic integration.

The implications are profound. European integration is as much a societal project as a political one, requiring public buy-in to sustain reforms. If unaddressed, Russia's ability to manipulate information ecosystems and cultural narratives risks entrenching divisions, undermining consensus on national priorities like defence modernisation or anti-corruption agendas. In practical terms, this means that while Moscow's capacity to sway parliaments or block policies is diminishing, its corrosive effect on public attitudes could linger for years – a reminder that countering hybrid threats demands not just institutional resilience, but societal immunisation.

Closer to Brussels, Further from Moscow? The Impact of EU Accession

While the relationship between EU accession and Russian influence is not always linear, findings indicate a broader trend—countries advancing in their EU integration process generally move toward political and economic disengagement from Moscow, alongside efforts to curb Russia's societal footprint. Ukraine, Moldova, and Montenegro exemplify how closer alignment with the EU correlates with a significant decline in Russian influence. Ukraine and Moldova's signing of the Association Agreement (SAA) and Deep and Comprehensive Free Trade Area (DCFTA) agreements marked a turning point in their disengagement from Russian political and economic structures. For Montenegro, accession talks and the prospect of EU membership by 2030 have reinforced its geopolitical shift away from Moscow.

Conversely, Serbia, Georgia, and Bosnia and Herzegovina face challenges in their EU accession, hindering their ability to effectively curb Russian influence. Georgia's retreat from its EU path has provided Moscow with opportunities to reassert its presence, particularly through cultivating ties with segments of the governing elite. This, however, contrasts with the clear pro-European orientation of the absolute majority of Georgian opposition. In Serbia, stalled judicial and governance reforms, slow progress on the rule of law, and a lethargic EU accession negotiation process have allowed pro-Russian narratives to persist. Meanwhile, Bosnia and Herzegovina faces the same structural weaknesses as Serbia, compounded by deep internal divisions between its entities, a political terrain Moscow actively exploits. **This contrast highlights the direct link between the credibility of the EU accession process and the erosion of Russian influence—where integration prospects remain uncertain, Moscow finds room to sustain or even expand its leverage.**

The most effective way to counter this trend is for the EU to restore credibility in its enlargement policy, demonstrating a clear commitment to accession for candidate states willing to undertake genuine reforms. **This requires geopolitical thinking, deeper strategic engagement, and flexible integration models**. Concepts like gradual integration and the Staged Accession Model[84], where candidate countries gain access to certain EU benefits before full membership, could accelerate reform momentum and, in turn, reduce Russia's capacity to obstruct candidate countries' future in the Union. Paired with targeted measures to directly counter malign Russian societal influence, these efforts could solidify the EU's role as the primary anchor for stability and democratic transformation both in the Western Balkans and the Eastern Trio.

6 Policy Recommendations

Russia's influence in the Western Balkans and Eastern Trio countries remains a strategic threat to their stability and Euro-Atlantic future. Moscow exploits governance vacuums, economic dependencies, and cultural affinities to erode these states' pro-European orientation. While the overall level of Russian influence has declined across most countries in recent years, this should not be mistaken for strategic disengagement. On the contrary, developments in Georgia—where Russia has significantly intensified its use of non-military tools since 2022—illustrate how Moscow may be recalibrating its approach to offset losses in direct political and economic leverage. This highlights that declining influence does not signal a moment for complacency but rather a shift in tactics. To counter this, the EU must engage on all fronts – political, economic, and societal – with a mix of **urgent actions** and **structural long-term initiatives**. Below are targeted recommendations in each domain, focused on what the EU should do to diminish Russian leverage and strengthen its own strategic influence.

Political Measures:

Sanction and isolate Kremlin's political proxies: Use EU instruments (visa bans, asset freezes, funding cuts) to target local political figures, parties, and oligarchs serving as Moscow's enablers. Swiftly penalise those obstructing reforms or amplifying anti-Western

[84] Milena Mihajlović/Steven Blockmans/Strahinja Subotić/Michael Emerson: Template 2.0 for Staged Accession to the EU, European Policy Centre, Centre for European Policy Studies, 2023.

narratives on Russia's behalf. Cutting off these pro-Kremlin networks – many of which operate

informally to infiltrate governments – raises the cost of subversion and demonstrates that aligning with Putin's agenda will carry tangible consequences in relations with the EU.

Enable gradual institutional participation: Restore credibility to the enlargement process by fully utilising opportunities of the concept of gradual integration—to provide and frontload some of the membership benefits even before full accession. Granting access to EU bodies is one way to do it, as originally outlined by the Staged Accession Model. Accordingly, the EU should explore the merit-based, gradual involvement of candidate countries in its institutions – including the EU Council, European Parliament, comitology, agencies, and programmes. This would foster deeper socialisation, promote knowledge and information exchange, strengthen institutional capacities, and create opportunities for joint work on advancing European strategic autonomy. **At the same time, it would make accession feel more real and attainable to citizens—countering the accession fatigue that Russia increasingly exploits to question the EU's sincerity and to promote itself as a more respectful or culturally aligned alternative.**

Boost anti-corruption and governance reforms: The EU should intensify support for rule-of-law initiatives to close the governance gaps that Moscow continues to exploit —particularly in settings where corruption, opaque political financing, and weak oversight create fertile ground for informal influence networks. This includes deploying additional rule-of-law advisors, increasing funding for judicial and anti-corruption bodies, and providing greater resources to civil society actors engaged in these efforts. As noted in the analysis, limited in its ability to project power through formal interstate cooperation, Russia often relies on informal political channels—enabled by systemic corruption—to shape domestic decision-making from within. At a time when the United States has withdrawn support for USAID – which has long assisted candidate countries in the fight against corruption and institutional development – the EU must raise its level of engagement and fill the resulting gap.

As part of broader anti-corruption measures, strictly apply the existing conditionality clauses: Following the principle of conditionality under the New Growth Plan for the Western Balkans and the Moldova or Ukraine Facility, the EU should link financial assistance to tangible reforms in key areas such as media freedom and fundamental rights. Existing regulations already include both preconditions and specific reform benchmarks, which can serve as credible leverage. By helping candidate countries root out bribery, organised crime, and patronage networks, Brussels reduces entry points for Russian political influence. Over time, stronger institutions and less state capture deny the Kremlin its traditional levers of control.

Intensify EU diplomatic engagement in regional disputes: Proactively mediate the conflicts and divisions that Russia exploits to block Western integration. The EU should reinvigorate diplomacy in the Serbia–Kosovo dialogue, Bosnia & Herzegovina's internal reforms, and frozen conflicts in Eastern Trio states to close off Kremlin entry points. Resolving or easing these disputes deprives Moscow of pretexts to meddle and fuel ethnonationalist tensions or anti-Western sentiments in the region. A hands-on EU political presence – through

special envoys and high-level dialogues – will demonstrate EU leadership in regional stabilisation, undercutting Russia's disruptor role.

Deploy EU missions to counter hybrid threats: Expand the mandate and reach of EU security missions to help partner governments tackle Russian espionage, electoral meddling, and cyber warfare. Building on the new EUPM Moldova (the EU's first mission devoted to fighting hybrid interference), the Union should be ready to stand up similar civilian missions or advisory teams in vulnerable Western Balkan states. These missions can embed experts in local institutions to strengthen early warning systems, protect critical infrastructure, and train officials in countering malign influence. A persistent on-the-ground EU security presence will bolster these countries' ability to detect and deter covert Russian operations, reinforcing their sovereignty.

Economic Measures:

Demonstrate enlargement credibility through a meaningful budgetary commitment: Negotiations for the new Multiannual Financial Framework (MFF) 2028–34 are already underway. To maintain the credibility of the enlargement process, the EU should take three key steps. First, **it should substantially increase the size of the next pre-accession instrument(s)**. This would build on existing mechanisms, including the recently introduced financial top-ups that operate until 2027, by taking a gradual step towards further financial reinforcement. Second, the entire next instrument—excluding the components related to support for civil society and vulnerable groups—**should be subject to conditionality**. This is to ensure that financial support is indeed closely tied to tangible reform progress. Finally, **the next MFF should explicitly earmark funds for the forthcoming round(s) of enlargement**, thereby signalling that the EU genuinely anticipates the accession of several candidate countries within the duration of the upcoming MFF. Together, these steps would demonstrate the EU's political commitment to enlargement and help restore credibility to the process. These steps would show that the EU's commitment to enlargement is not merely rhetorical, but backed by concrete financial decisions—visible, measurable, and strategically anchored. At the same time, such a move would undercut Russia's narrative that the EU has no intention of integrating the region and reduce the credibility of claims that alternative partnerships are more stable or reliable.

Redirect support from state to societal actors in cases of persistent reform stagnation or visible deepening of alignment with Russia: In contexts where governments are persistently uncooperative or openly backsliding on democratic commitments, the EU should consider redirecting financial and technical assistance away from state institutions and towards civil society actors, independent media, universities, and youth programmes. This approach would preserve the EU's presence and visibility in the country, support pro-European constituencies, and build societal resilience from the inside out. Rather than reinforcing anti-EU narratives that depict the Union as punitive or detached, such reallocation would send a clear message that European engagement continues—even when political leadership fails to deliver. It would also deprive Russia of easy victories in moments of institutional paralysis, by ensuring that EU resources empower bottom-up democratic capacities instead
Accelerate energy independence: Drastically reduce the regions' reliance on Russian gas

and oil through EU-backed diversification and infrastructure. The EU should fast-track funding for gas interconnectors, LNG terminals, and electricity grid links bridging the Western Balkans and Eastern Partnership with EU markets. mmediate measures such as financial assistance for energy diversification and access to the EU's joint gas purchasing mechanisms can help partners like Moldova or Serbia facing supply vulnerabilities, while strategic investments in renewables and energy efficiency cut demand over time. At the same time, strategic investments in renewables and energy efficiency—alongside the broader green transition—offer a long-term pathway to reduce overall energy consumption and increase structural resilience. Every gain in energy autonomy strips Moscow of one of its strongest coercive tools – the ability to turn off the lights or heat to extort political concessions.

Deepen EU investment and market integration: Offer these countries a tangible economic stake in Europe's prosperity well before full membership – in line with the gradual integration concept. This means fully implementing and expanding the EU's Economic and Investment Plans to fund high-impact infrastructure, connectivity, and green projects. Prioritise regional highways, railways, and digital networks that knit Western Balkan and Eastern Trio economies into EU value chains. In parallel, gradually integrate willing partners into parts of the EU single market and regulatory frameworks (for instance, aligning standards and eliminating tariffs in key sectors). Such early economic inclusion will spur growth, reduce unemployment, and diminish these countries' need to rely on Russian trade or loans, reinforcing the sense that their future prosperity lies with Europe.

Shield partners from Russian trade coercion: Establish an EU anti-coercion support mechanism to defend candidate states against Russian economic blackmail. If Moscow imposes sudden trade bans or punitive tariffs – as it has on Georgian wine and Ukrainian agriculture in the past – the EU should swiftly counter with measures to absorb the shock. This could include emergency purchase agreements for boycotted goods, compensatory financial aid, and accelerated access to EU markets for affected exports. By publicly committing to offset any Russian sanctions or embargoes, Brussels reassures local businesses and governments that siding with the EU will not mean economic ruin. Rapid counter-coercion responses will deny the Kremlin the ability to sow fear and leverage economic pain for political gain.

Incentivise EU businesses to replace Russian influence: Launch an "EU Nearshoring Initiative" to encourage European investment in EU candidate countries, crowding out malign influence over time. The EU and its development banks (EIB, EBRD) should offer risk insurance, blended finance, and tax incentives for EU companies to set up operations and supply chains in Belgrade, Sarajevo, Chișinău, Tbilisi, and beyond. While full-scale nearshoring may not be immediately feasible across all sectors or countries, targeted investments in light industry, ICT services, and value chain components can build momentum over time. By providing attractive European alternatives in sectors dominated by Russian or Chinese capital (energy, mining, telecommunications, etc.), this initiative reduces dependence on adversarial states. The long-term goal is to hardwire these economies into Europe's industrial base – generating jobs and growth that align local interests with the EU, not Moscow. As European firms take root and local SMEs get better access to EU markets and know-how, Russian economic leverage will erode correspondingly.

Societal Measures:

Launch proactive strategic communications: Seize the narrative from Russia by dramatically boosting the EU's direct communication with candidate countries' societies —not just through governments or traditional diplomacy, but by speaking directly to citizens in their own languages and on platforms they actually use. The EU should establish an active and engaging presence in local languages on popular media platforms – including those where Kremlin propaganda spreads uncontrollably like *TikTok and Telegram* – to highlight EU support, debunk misinformation, and promote European values. A dedicated StratCom team can monitor and "pre-bunk" emerging disinformation themes, rebutting false Russian narratives (e.g. about EU enlargement or sanctions) in real time. This rapid-response communications offensive will help protect the public against fake news and demonstrate that the EU, not Moscow, is the reliable partner for truth and transparency.

Support independent media and fact-checking: Counter Russia's media dominance by investing heavily in local independent journalism. Building on existing efforts, the EU should expand grants, training, and equipment for free media in both regions. This includes funding investigative reporting into corruption and disinformation, supporting fact-checkers to expose fake news, and possibly establishing Russian-language news services for Eastern Partnership states to provide alternatives to Kremlin-backed outlets. Over the long term, a pluralistic, professional media landscape will erode Moscow's ability to spread falsehoods unchallenged and will strengthen democratic discourse aligned with European norms.

Further boost the existing EU tools: The EU should scale up its investment in the East StratCom Task Force, particularly its EUvsDisinfo programme, to enhance the monitoring, analysis, and exposure of Russian disinformation campaigns. Strengthening this initiative would enable more systematic tracking of hostile narratives, improve the EU's capacity to respond in real time, and support the development of counter-narratives grounded in fact-based communication. Increased funding should also support closer coordination with Member States, candidate countries, and independent media to ensure broader dissemination and localised impact of debunked disinformation.

Empower civil society and people-to-people exchanges: Dramatically increase support for civil society organisations to build grassroots resilience against authoritarian influence. At the same time, broaden people-to-people contacts: expand Erasmus+ slots for students from the region, sponsor town twinning and volunteer programmes, and create more opportunities for young leaders to experience Europe first-hand. Such engagements foster a new generation that shares European values and personal connections. Over time, stronger civil society networks and extensive youth linkages will form a societal barrier against malign influences, making communities less susceptible to nationalist or sectarian narratives fueled by the Kremlin.

Promote inclusive identity narratives: Undercut the Kremlin's cultivation of cultural and religious divides by offering a more inclusive and appealing narrative of national identity within a European future. Moscow often postures as the defender of Slavic heritage and Orthodox faith to fuel anti-Western sentiment – the EU should work with local educators, artists, and faith leaders to dispel the false dichotomy that traditional identity must oppose Europe. This can include supporting cultural programmes (museums, films, heritage

restoration) that celebrate each nation's identity as part of the European family, and amplifying voices of respected local figures who champion EU integration as compatible with patriotism and religious values. By reframing European integration as a source of pride and cultural renewal rather than loss, the EU robs Russia of a potent propaganda angle. Over the long run, a confident, inclusive national narrative will reduce the appeal of Moscow's reactionary messaging and strengthen popular commitment to a European trajectory.

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Annex I *InvigoratEU External Influence Index*: Detailed Breakdown

Element of analysis	Indicator	Sources of evidence	Indicator scale (0-3)	Weighting the indicator
POLITICAL-SECURITY DIMENSION				
Bilateral and multilateral platforms (overall 25%)				
Level of bilateral partnership	Depth and breadth of formal cooperation	Number and importance of signed agreements, presence of joint initiatives	0 – No close partnership 1 – Partnership in development 2 – Limited partnership, e.g., agreements in particular areas 3 – Deep, long-term strategic partnerships across multiple sectors	15%
Participation in Russia/China/Turkey-led multilateral political initiatives	Extent of participation in multilateral initiatives	Membership or observer status, participation in key summits, decision-making roles	0 – No participation 1 – Observer status or ad hoc participation 2 – Membership but limited participation 3 – Membership and significant contributions	5%
Bilateral high-level visits	Frequency and level of state visits	Number and level of visits (head of states and governments, ministers)	0 – No visits recorded 1 – Occasional high official and ministries visits 2 – Regular high official visits and ministries visits 3 – Frequent high official and ministerial and visits and by head of states and/or governments	5%
Internal politics (overall 25%)				

Relations with political parties	Political influence through party channels	Support, funding, or ideological alignment with external actors of key political parties	0 – No significant relations among parliamentarian parties (PP) 1 – Ideological alignment and cooperation with opposition parties 2 – Ideological alignment and cooperation with junior parties in government coalition 3 – Ideological alignment and cooperation with major parties in government coalition	5%
Parliamentarian cooperation	Engagement in inter-parliamentary networks	Joint parliamentary sessions, parliamentary delegation visits, formal cooperation platforms	0 – No cooperation established 1 – Limited cooperation through delegations or informal networks 2 – Formalised cooperation 3 – Institutionalised cooperation with regular exchanges	5%
Election interference	Evidence of meddling in the election process	Instances of cyberattacks, disinformation or foreign funding	0 – No interference recorded 1 – Minor interference in information channels (e.g., disinformation campaigns) 2 – Isolated, uncoordinated interference attempts 3 – Coordinated and significant interference with election outcomes at risk	10%
Legislative interference	Influence on domestic law-making process	Lobbying, pressure to pass or reject laws, foreign-sponsored policies	0 – No interference recorded 1 – Minimal lobbying or indirect influence 2 – Occasional influence on particular laws 3 – Direct involvement in shaping key national legislation	5%
Military sphere (overall 25%)				

Military cooperation	Depth and frequency of military collaboration	Joint exercises	0 – No cooperation 1 – Military drills in discussions 2 – Bilateral military drills 3 – Bilateral and multilateral military drills	5%
Military presence	Degree of permanent/temporary foreign military presence	Troops, foreign bases, joint defence installations	0 – No active presence 1 – Military presence discussed but not implemented 2 – Short-term or semi-permanent deployments or symbolic presence 3 – Permanent bases or significant foreign military infrastructure	15%
Arms trade	Volume and strategic value of equipment trades	Volume of arms traded, defence contracts	0 – No notable cooperation 1 – Discussions on arms trade 2 – Notable arms trade 3 – Significant and sustained arms trade with strategic value	5%
Foreign policy (overall 25%)				
CFSP alignment in relation to Russia/China/Turkey	Degree of alignment with CFSP on Russia/China/Turkey issues	Alignment with High Representative's declarations	0 – Full alignment with CFSP 1- >0; <20% of non-alignment 2 - >20%; <60% of non-alignment 3 – >60% of non-alignment	10%

Involvement in the pursuit of key national interests (e.g. EU/NATO membership, territorial integrity, etc.) - contestation or support	Degree of contestation of key national policies or the degree of support for key national policies[85]	Public critics, hostile diplomatic actions, coercive economic measures, support for secessionist movements, etc. (in case of contestation) or Public endorsements, diplomatic assistance in multilateral forums, non-recognition of seceding entities etc. (in case of support	0 – No involvement or neutral stance 1 – Low-level involvement through rhetoric 2 – Moderate involvement, characterised by consistent contestation or support 3 – Significant involvement, where external actors actively and strategically support or contest key national interests	15%

[85] This indicator evaluates the extent of interest that foreign actors have in the key national interests of individual states. A foreign actor's influence is likely to be less intensive if it shows less interest in a state's key national interests. However, when a foreign actor actively opposes a state's national interests, its influence tends to increase due to deeper engagement. Conversely, there are instances where foreign actors actively support specific key national interests, thereby gaining leverage and fostering closer ties with those states, which also leads to significant influence. For example, Russia's influence in Moldova is considerable as it supports secessionist movements, thereby opposing the country's aspirations for territorial integrity and sovereignty. In contrast, in Serbia, Russia's influence remains strong due to its substantial backing on Serbia's position on the Kosovo issue, making it an appealing partner.

ECONOMIC DIMENSION				
Trade and investment relations (overall 67%)				
The official level of economic/trade partnership	Strength of formal economic/trade agreements	Signed trade agreements, economic treaties, customs unions, trade promotion frameworks	0 – No formal economic partnership or negotiations ongoing 1 – Trade agreements in particular sectors 2 – Free trade agreements 3 – Deep and comprehensive free trade agreements (second generation free trade agreement)	5%
Foreign Direct Investments	**FDI inflows**	Annual FDI inflows as a percentage of total FDI inflows	0 – No FDI >1% of total FDI 1 – FDI 1-5% of total FDI 2 – FDI 5-20% of total FDI 3 – FDI >20% of total FDI	7%
	FDI Stock	FDI stock as a percentage of total FDI stock	0 – No FDI >1% of total FDI 1 – FDI 1-5% of total FDI 2 – FDI 5-20% of total FDI 3 – FDI >20% of total FDI	15%
Trade Intensity (goods and services trade)	**Exports**	Share of exported goods and services as a percentage of total exports	0 – Trade <5% of total 1 – Trade 5-10% of total 2 – Trade 10-20% of total 3 – Trade >20% of total	25%
	Imports	Share of imported goods and services as a percentage of total imports	0 – Trade <5% of total 1 – Trade 5-10% of total 2 – Trade 10-20% of total 3 – Trade >20% of total	15%
Strategic economic dependence (overall 33%)				
Strategic assets ownership and presence of foreign firms	Ownership of key sectors/assets by foreign actors, as well as presence of foreign-owned or partnered firms	Control of strategic sectors (e.g., energy, telecom, transport, banking) by foreign firms/governments	0 – No foreign ownership or minimal ownership of minor assets 1 – Relative majority ownership in one sector 2 – Relative majority ownership in several sectors 3 – Absolute majority ownership in at least one sector	11%

Energy dependence	Share of energy imports from foreign actors	Percentage of total energy imports coming from one external actor	0 – Energy imports <5% 1 –5-20% energy imported 2 – 20-35% of energy imported 3 – >35% of energy imported from a single actor	15%
Official foreign debt	Foreign debt to external actors	Foreign debt to a specific country as a percentage of total dept	0 – No foreign debt 1 – Foreign debt <5% of total 2 – Foreign debt <15% of total 3 – Foreign debt >15% total	7%
SOCIETAL DIMENSION				
Mobility and connectivity (overall 27%)				
Diaspora	Size and influence of the diaspora community	Size of the diaspora population and their level of influence in local politics, economy and culture	0 – No significant diaspora 1 – Small diaspora with minimal influence 2 – Moderate diaspora with some influence 3 – Large diaspora with significant influence	6%
Visa requirement	Ease of travel between countries	Visa requirements for citizens, presence of visa-dree agreements or relaxed visa policies	0 – No visa-free access 1 – Visa required with some facilitation 2 – Visa-free access for a shorter stay (up to 30 days) 3 – Visa-free access for a longer stay (more than 30 days)	3%
Tourism	Volume and impact of tourism coming from China, Turkey or Russia	Number of tourists from the external actor and their economic impact	0 – Negligible tourism interactions 1 – Low tourism interaction (1-5% of total tourism) 2 – Moderate tourism interaction (5-10% of total tourism) 3 – High volume of tourism (>10% of total tourism)	3%

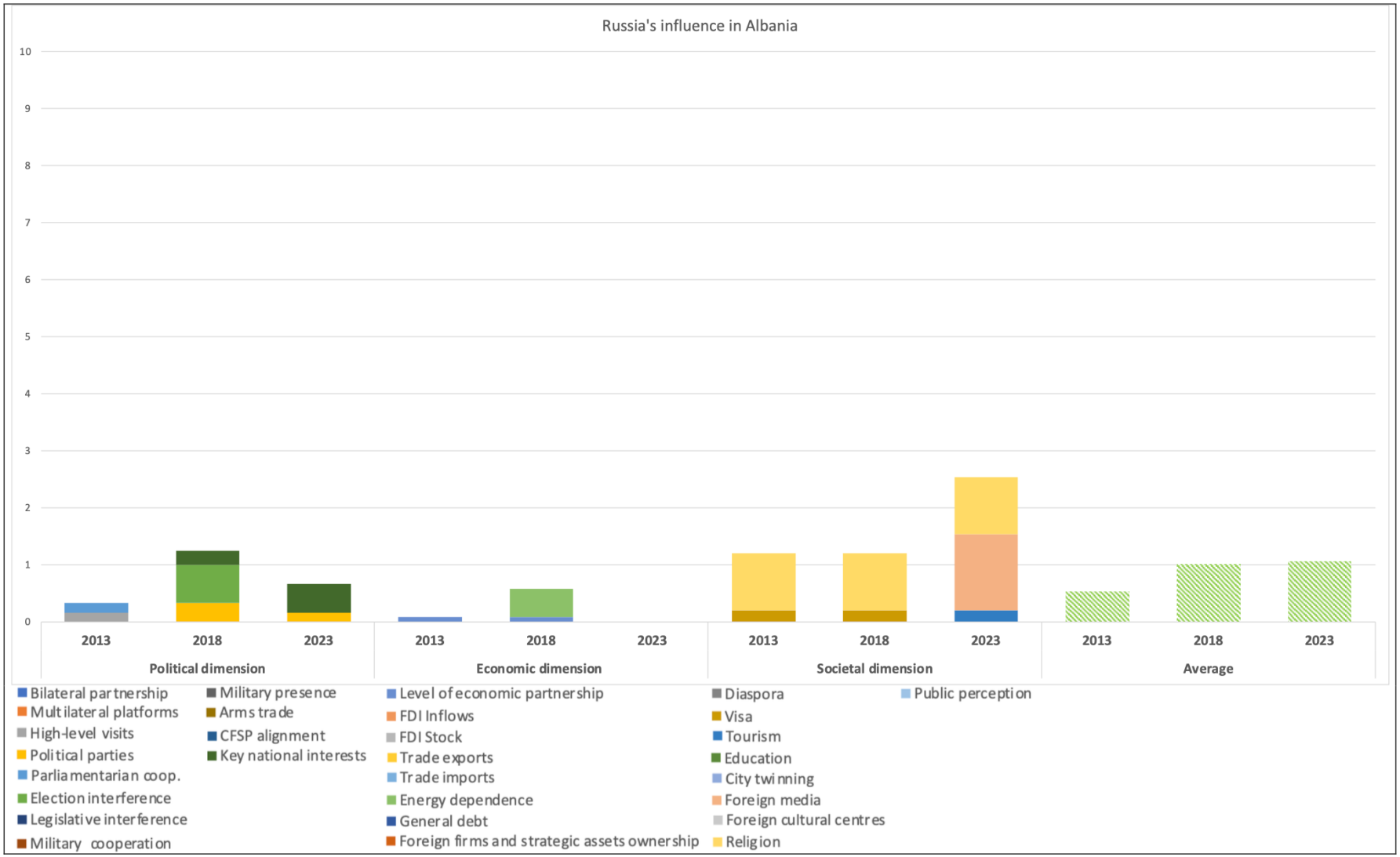
Education/student exchanges	Scale and impact on educational exchanges	Number of exchange programmes, students participating and institutional partnerships as share of total	0 – No notable exchanges 1 – Minimal exchanges or programs 2 – Moderate exchanges with some impact 3 – Extensive exchanges with significant impact	10%
Local/provincial government partnership, city twinning	Number and effectiveness of local/provincial partnerships	Number of twinning agreements and their effectiveness	0 – No partnerships or twinning 1 – Few, ineffective partnerships 2 – Moderate number with some effectiveness 3 – Significant partnerships with proven effectiveness	5%
Cultural and informational sphere (overall 55%)				
Foreign media presence and influence	Extent and nature of foreign media presence	Number of foreign media outlets, their reach, and influence on public opinion	0 – No notable foreign media presence 1 – Minimal presence with limited reach 2 – Moderate presence with some influence 3 – Extensive presence with a noticeable influence on shaping public opinion	20%
The presence of foreign cultural centres	Impact of foreign cultural institutions	Number of cultural centres and their role in promoting foreign culture and language	0 – No foreign cultural centres 1 – Existing but with limited impact 2 – Existing with moderate impact 3 – Existing with substantial impact	5%

Religious bonds and cooperation	Level of religious ties and cooperation	Depth of religious collaborations and partnerships	0 – No religious ties 1 – Different religion but some ties with local minorities 2 –Majority religion, moderate church relations 3 – Majority religion, well-developed church relations	30%
Public perceptions (overall 18%)				
Perception/Public Opinion (on cooperation benefits, on donation intensity, on global influence, on leader popularity, donor perception)	Public opinion on selected aspects	Opinion on cooperation benefits, donation intensity, global influence, leader popularity, and donor perception	0 – Mostly negative opinion 1 – Mostly neutral or mixed opinions 2 – A generally positive opinion with some criticism 3 – Mostly positive opinion with broad support	18%

Annex II *InvigoratEU External Influence Index* per Candidate Counry

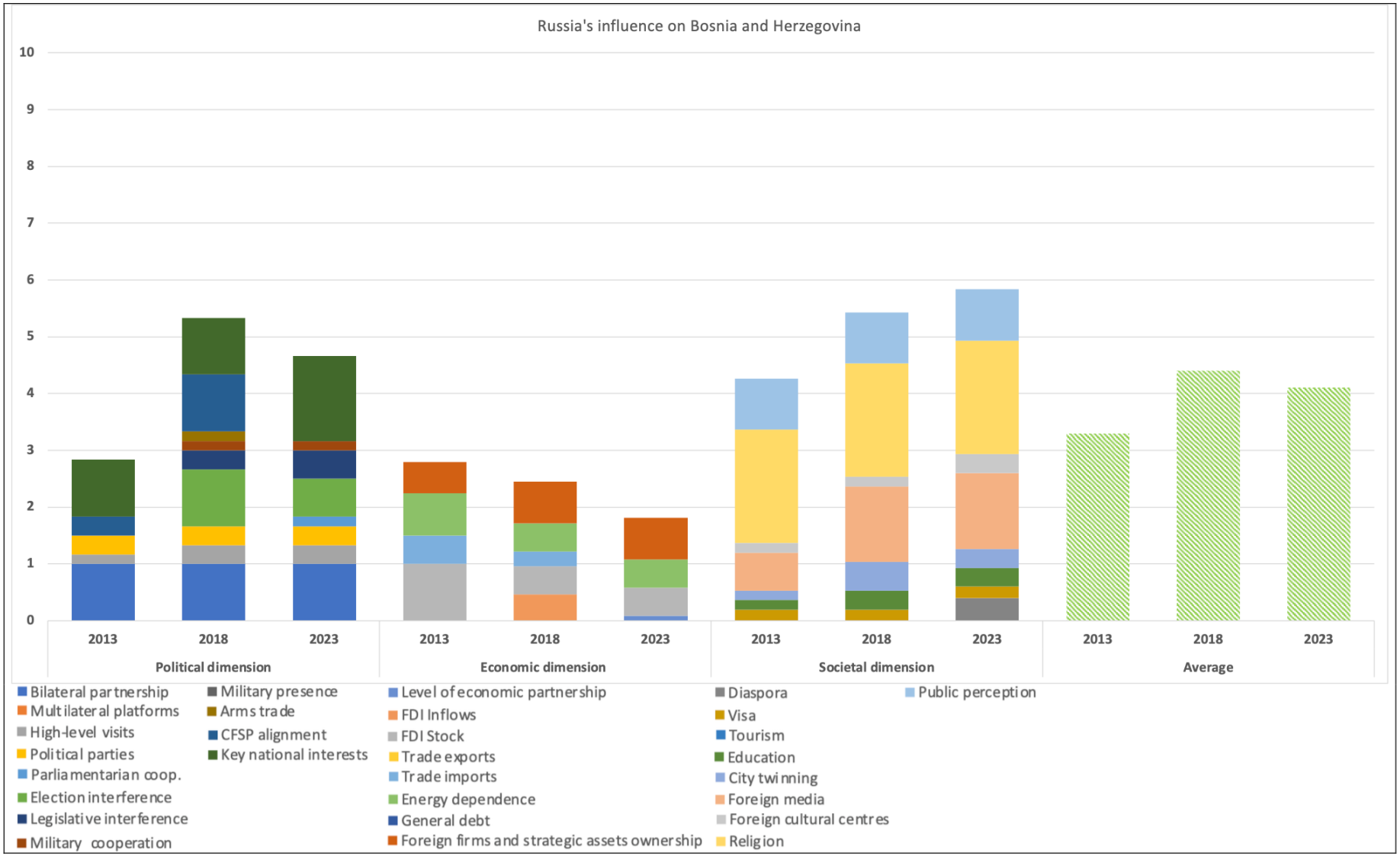
Annex II.1 Albania

Figure 12: Russia's Influence in Albania (2013-2023)



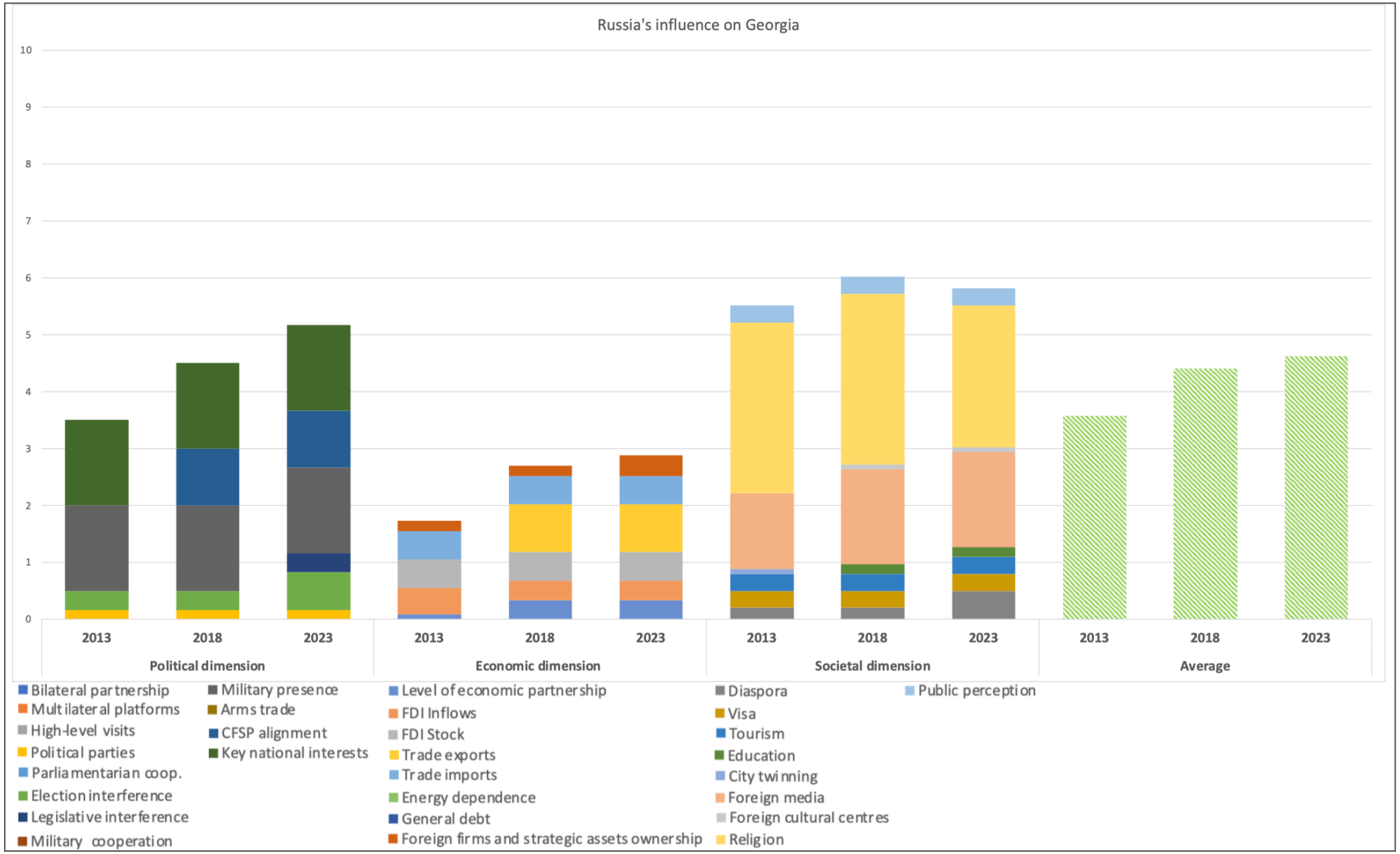
Annex II.2 Bosnia and Herzegovina

Figure 13: Russia's Influence in Bosnia and Herzegovina (2013-2023)



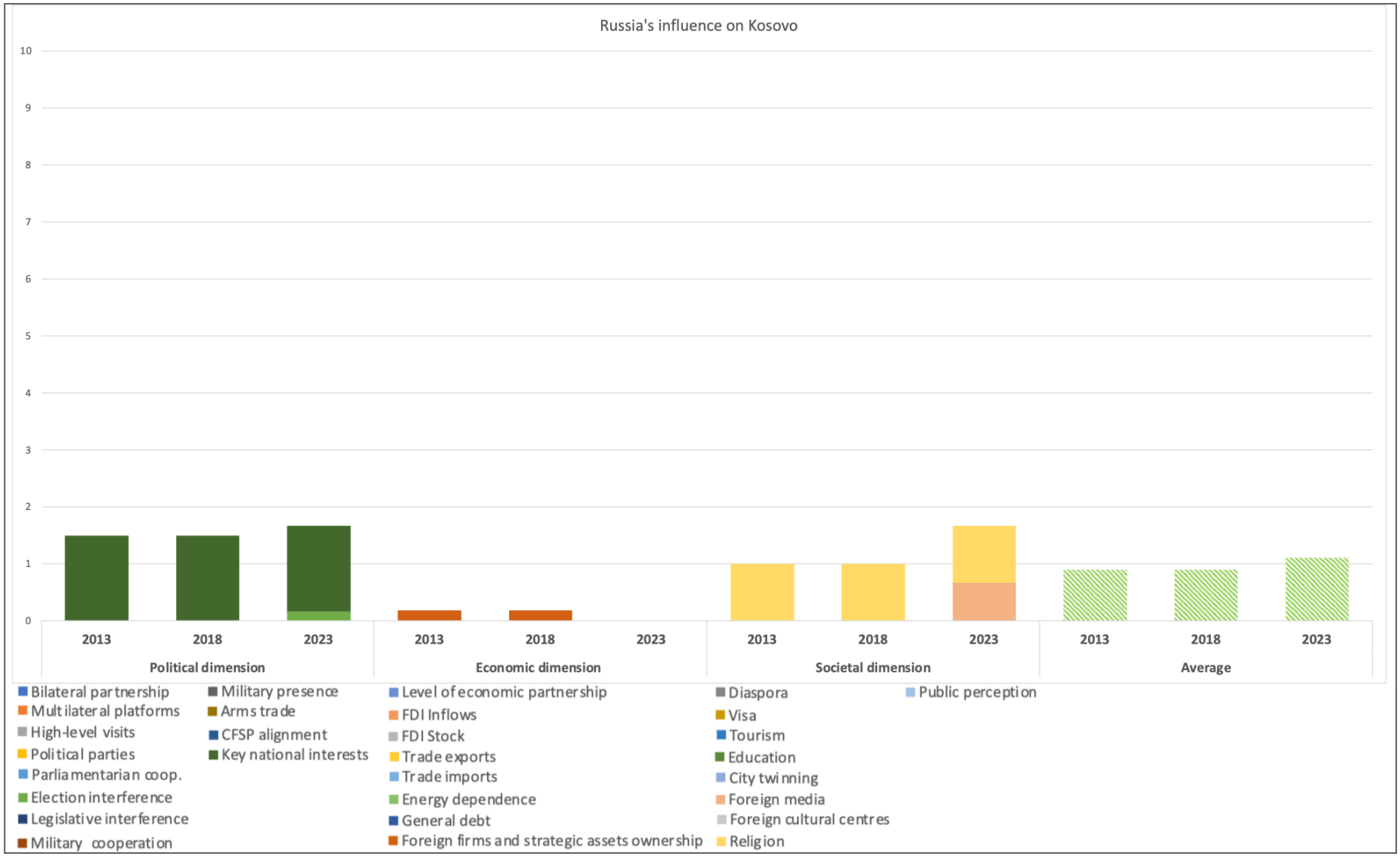
Annex II.3 Georgia

Figure 14: Russia's Influence in Georgia (2013-2023)



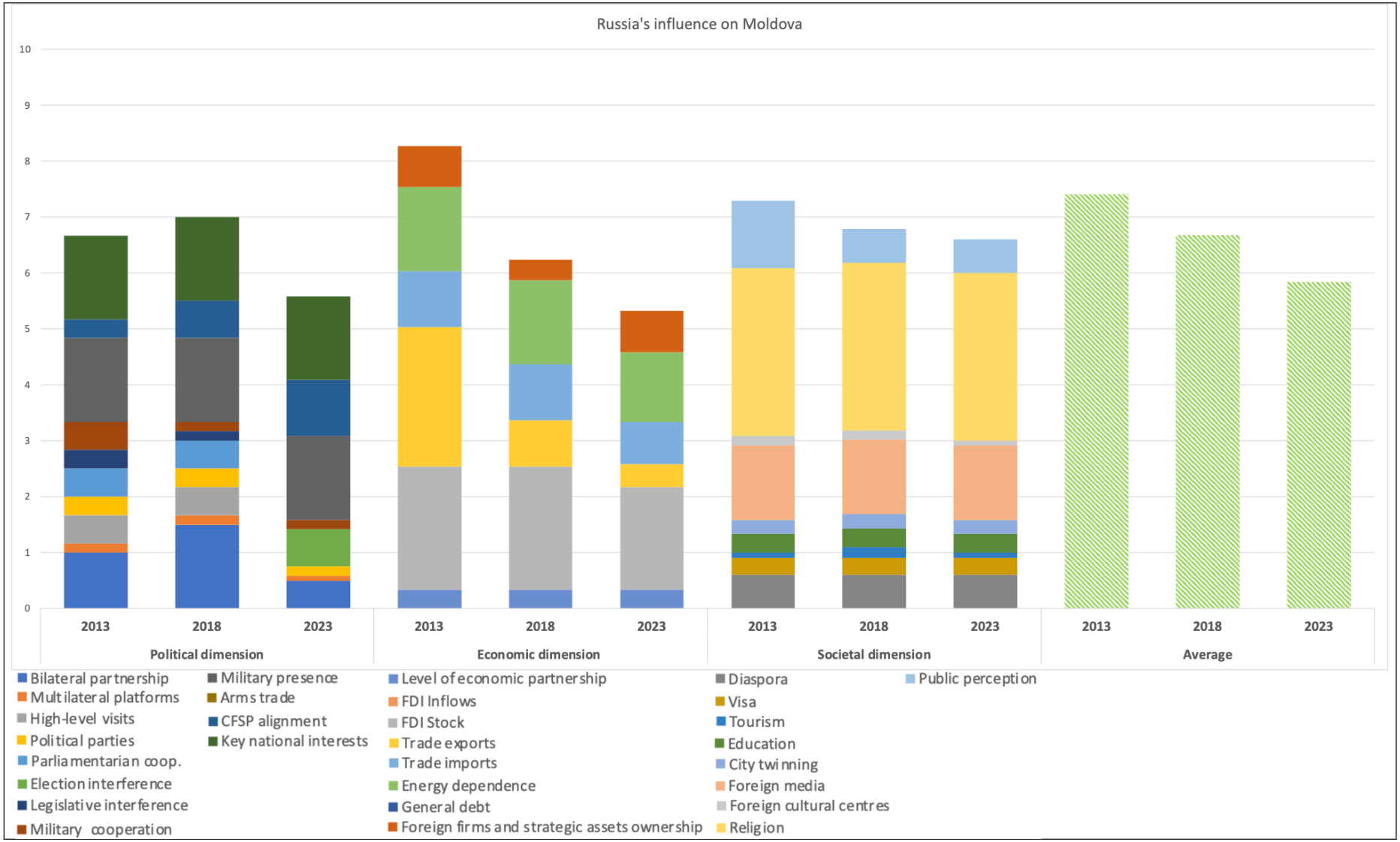
Annex II.4 Kosovo

Figure 15: Russia's Influence in Kosovo (2013-2023)



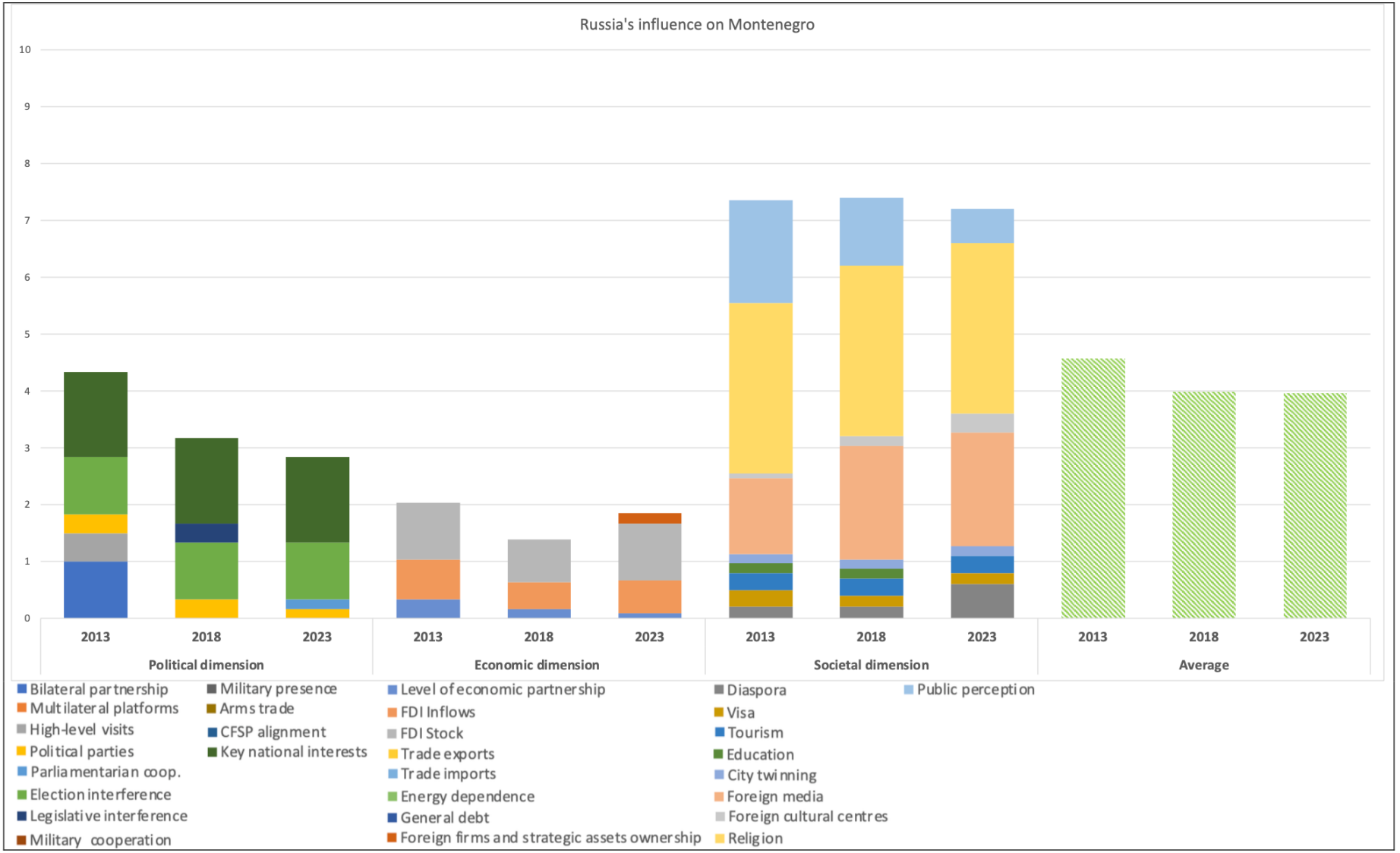
Annex II.5 Moldova

Figure 16: Russia's Influence in Moldova (2013-2023)



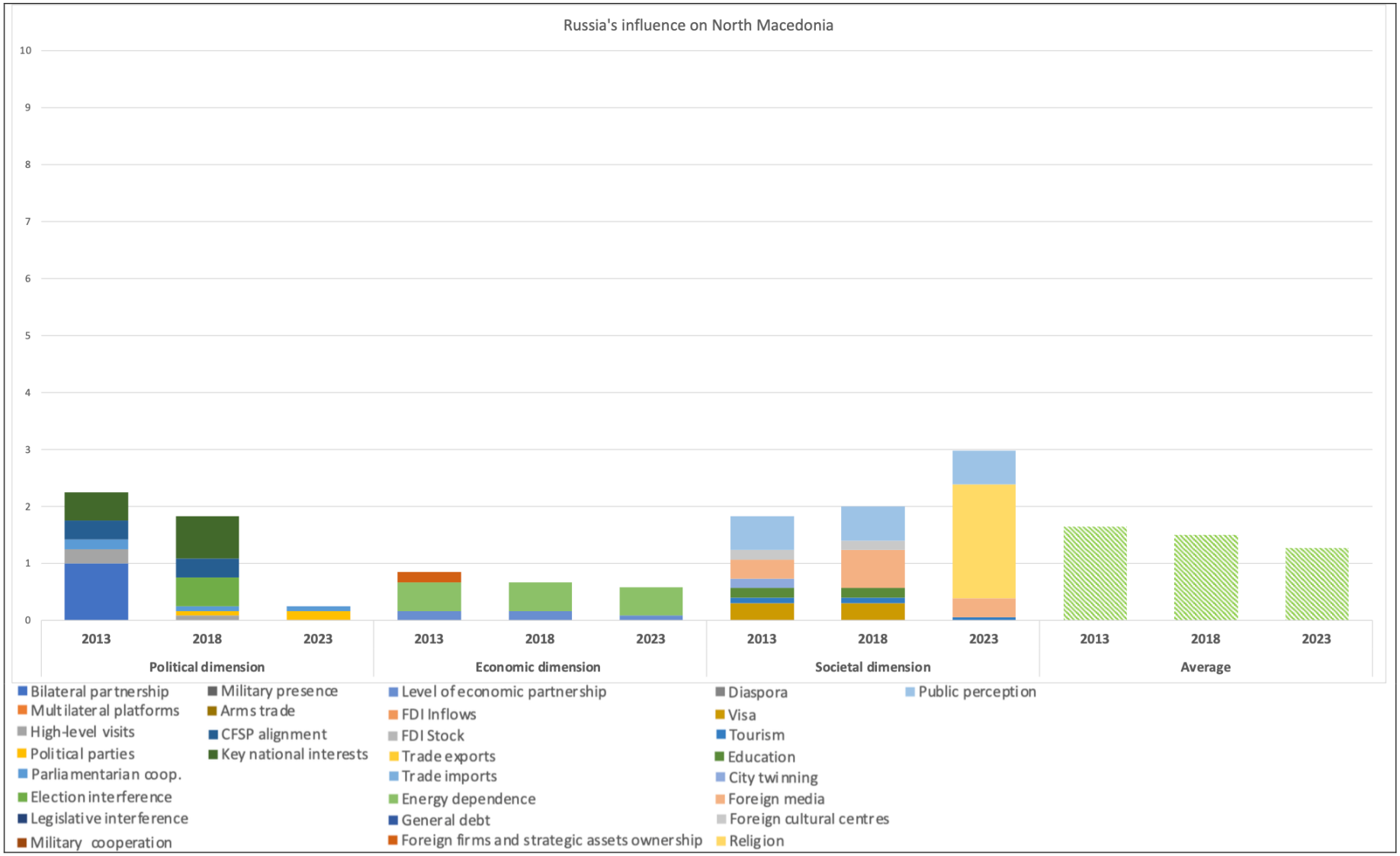
Annex II.6 Montenegro

Figure 17: Russia's Influence in Montenegro (2013-2023)



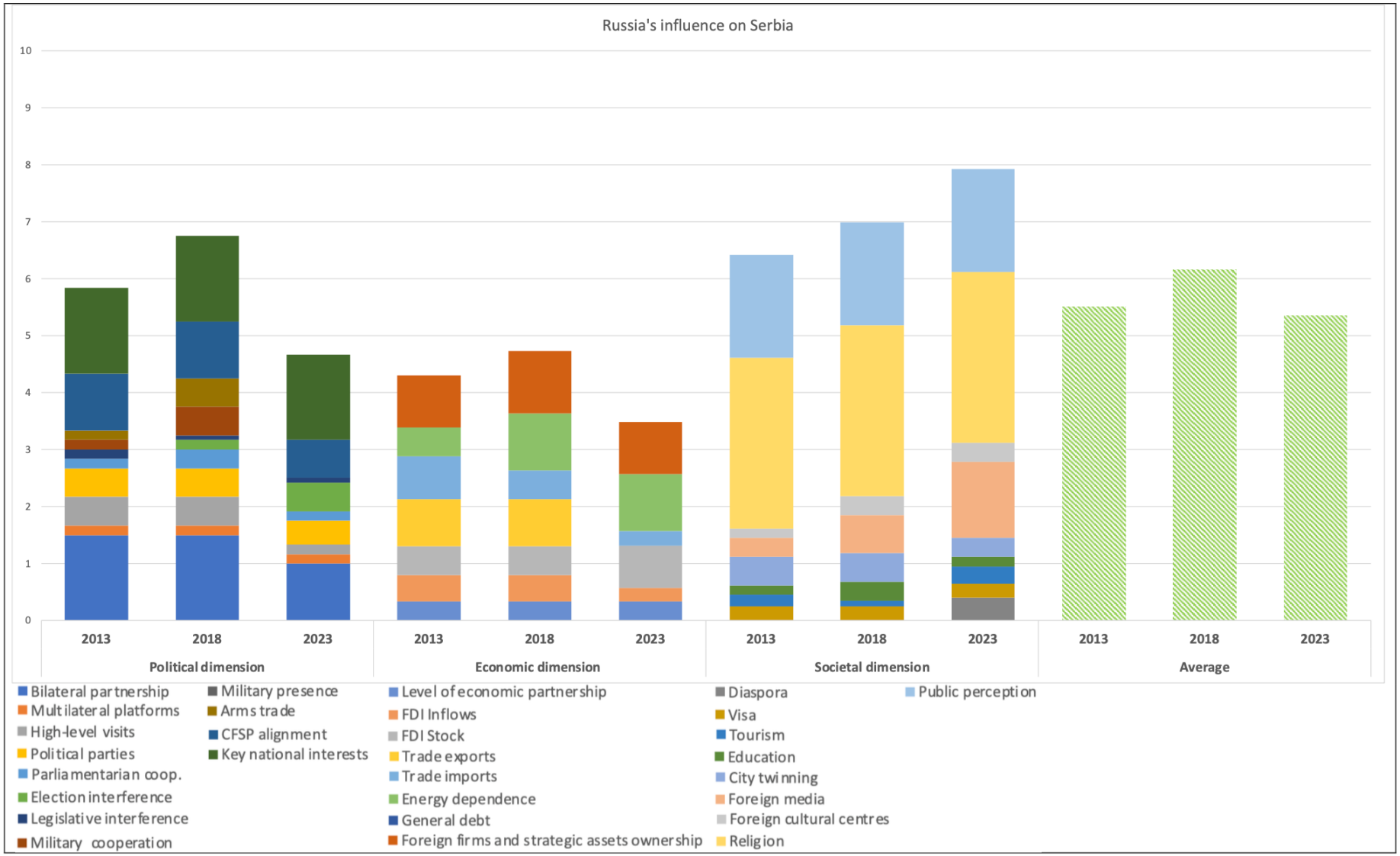
Annex II.7 North Macedonia

Figure 18: Russia's Influence in North Macedonia (2013-2023)



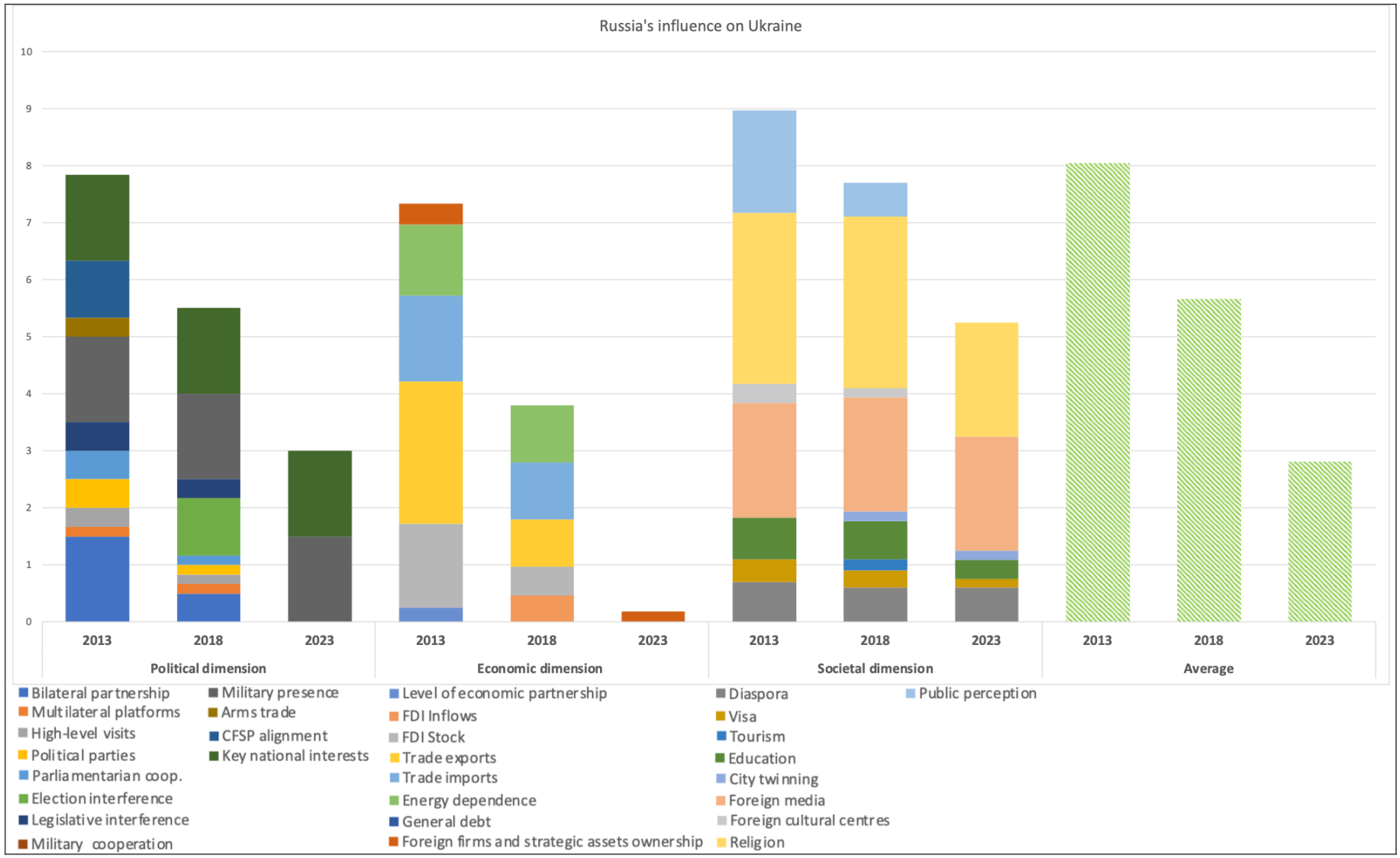
Annex II.8 Serbia

Figure 19: Russia's Influence in Serbia (2013-2023)



Annex II.9 Ukraine

Figure 20: Russia's Influence in Ukraine (2013-2023)



About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

How can the EU invigorate its enlargement and neighbourhood policy to enhance Europe's resilience?

Our first goal is to investigate how to reform the EU's enlargement strategy in a new geopolitical phase, HOW TO RESPOND to other actors' geopolitical ambitions in the Eastern Neighbourhood and Western Balkans, and HOW TO REBUILD the EU's foreign policy arsenal in view of a new era of military threats (triple "R" approach) combining the modernisation and geopolitical logics of EU enlargement, leading to new data – e.g. a public opinion survey in Ukraine, a set of scenarios, an external influence index (Russia, China, Turkey), and a social policy compliance and cohesion scoreboard.

Our second goal is to elaborate an evidence-based, forward-looking vision for the EU's political agenda and institutional frameworks for co-designing a multidimensional toolbox (i.e. two tailor-made toolkits), together with InvigoratEU´s Expert Hub, Civil Society (CS) Network, Youth Labs, Workshops for Young Professionals and Policy Debates in a gaming set up, which will result in context-sensitive and actionable policy recommendations for European and national political stakeholders and (young) European citizens in particular.

Our third goal is to deploy a CDE (communication, dissemination and exploitation) strategy aiming at recommendations from Day 1 to maximize our scientific, policy and societal impact in invigorating the EU's enlargement and neighbourhood policies to enhance Europe's resilience. Ultimately, InvigoratEU is a deliberately large consortium respecting the diversity of Europe and political perspectives; 7 out of 18 are from Georgia, Moldova, Ukraine, and the western Balkans (North Macedonia, Montenegro, Serbia), complemented by our Civil Society Network of 9 representatives from all Western Balkan countries, Georgia, Moldova and Ukraine.

InvigoratEU is funded by the European Union.