

ANALYSIS

# Central and Eastern European China Policy Audit 2025–2026: Between De-Risking and Re-Engagement

Ivana Karásková, Selena Orly, Konrad Szatters



## **CENTRAL AND EASTERN EUROPEAN CHINA POLICY AUDIT 2025–2026: BETWEEN DE-RISKING AND RE-ENGAGEMENT**

### **Analysis**

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# Summary

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- This paper provides a comparative framework for understanding China policies across Central and Eastern Europe, South-Eastern Europe, and selected Eastern Partnership countries. Its importance lies in correcting the tendency to treat this highly heterogeneous space as a single political bloc. The countries examined face some of the same external pressures, but their responses to China remain complex and differ substantially.
- This first pilot edition of the CEE China Policy Audit covers developments from January 2025 to July 2026. It establishes a baseline for tracking continuity, recalibration, and longer-term change, while offering policymakers, analysts, and other stakeholders working on China's engagement in Europe a more differentiated way to interpret national approaches.
- Since Donald Trump's return to office, regional policies have been shaped by four interacting factors: uncertainty about US policy, the continued centrality of the war in Ukraine and China's alignment with Russia, domestic political turnover, and different levels of economic exposure to China.
- The war in Ukraine remains the most important common filter. It has pushed China policy further into the security realm, but has not produced a uniform response. In some countries, it has reinforced skepticism and de-risking. In others, it increased bounded economic pragmatism, and in a smaller group, it led to political and economic opening toward Beijing.
- Based on these responses, the audit divides the countries into five analytical categories: security-first skeptics, managed pragmatists within a Western framework, a transition case, political openers, and structurally constrained actors. These categories describe dominant political logics rather than fixed alignments. Important differences remain within each group. Also the boundaries between categories are blurred, and domestic political change can move countries from one category toward another without immediately transforming their economic relations with China.
- The principal regional divide is therefore not between countries that are "pro-China" or "anti-China." It concerns whether China is treated primarily as a security challenge, a bounded economic opportunity, a politically useful partner, or a relationship sustained largely by structural constraints.
- Security-first skeptics – Czechia, Estonia, Lithuania, Poland, and Romania: China policy is increasingly subordinated to a broader security outlook

shaped by Russia's war, the China–Russia partnership, cyber and critical infrastructure vulnerabilities, economic coercion, and tensions surrounding Taiwan. Economic engagement continues but no longer sets the political tone.

- Managed pragmatists within a Western framework – Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Latvia, Montenegro, North Macedonia, and Slovenia: These countries maintain economic and diplomatic channels with China where useful, but generally keep engagement subordinate to EU, NATO, or accession priorities.
- Hungary – a transition case: The end of Viktor Orbán's 16 years in power has reduced China's political importance in Budapest, but has not dismantled the economic foundations of the relationship. The Magyar government has prioritized relations with the EU, institutional reform, and domestic accountability while continuing to accept Chinese investment where it serves Hungarian interests.
- Political openers – Serbia and Slovakia: In both countries, China is valued not only as a source of trade and investment but also as a political resource providing diversification, room for maneuver, and leverage in relations with Brussels and other Western actors.
- Structurally constrained actors – Belarus, Ukraine, and, in a narrower economic sense, Kosovo: Their relations with China persist less because of an affirmative political choice than because sanctions, war, non-recognition, economic exposure, or limited alternatives restrict their room for maneuver.
- Beijing has responded selectively to this differentiated landscape. It seeks to preserve entrenched economic positions, deepen ties with governments that attach political value to the relationship, maintain functional channels with cautious pragmatists, and contain losses where China is associated primarily with Russia, coercion, cyber threats, or infrastructure vulnerabilities.
- The result is neither a regional turn toward China nor a uniform process of disengagement. Shared geopolitical pressures are producing markedly different national responses, while in many countries the political importance of China is changing faster than the underlying economic relationship.

# Introduction

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Since Donald Trump's return to office in January 2025, relations between the People's Republic of China (hereafter China) and Central and Eastern European (CEE) countries have not moved in one common direction. Instead, governments across the region have adopted different approaches shaped by four interacting factors: uncertainty about US policy, the continued centrality of the war in Ukraine and China's alignment with Russia, domestic political turnover, and the varying depth of each country's economic exposure to China.

The most important common filter remains the war in Ukraine (and China's "pro-Russian neutrality"). Across most of the region, it has pushed China policy further into the realm of security rather than pure economics. But that systemic pressure has not produced one uniform outcome. In some countries, these pressures hardened skepticism and encouraged de-risking. In others, they reinforced a quiet, low-profile pragmatism and calls for re-engagement. In a smaller number of cases, they created (further) incentives for governments to use China as a source of investment, economic modernization, and additional political leverage in dealing with Brussels and other Western partners.

China's response has been selective. Beijing has tried to preserve privileged positions where it already has political access, accommodate pragmatic governments willing to keep channels open, and contain losses in countries where China is now viewed primarily through the lens of coercion, cyber risk, Taiwan, or the China–Russia partnership. In the Western Balkans in particular, Beijing still benefits from weak institutions, elite-level transactional politics, and the absence of a clearly operationalized EU "China conditionality" in enlargement policy.

This paper presents the first pilot edition of the CEE China Policy Audit, covering developments from January 2025 to July 2026. The audit provides a systematic and regularly updated assessment of how governments across the region are adapting their China policies to changing geopolitical, economic, and domestic conditions. Rather than capturing only major diplomatic events, it seeks to identify broader patterns of continuity, recalibration, and divergence across countries. This pilot edition establishes a baseline for comparison. Subsequent audits are planned on an annual basis, allowing for distinguishing temporary shifts from more durable changes in the region's relations with China.

For the purposes of this audit, CEE and South-Eastern Europe (SEE) are treated as a single analytical space – not because the countries share a common China policy, but precisely because they do not. What they share is a set of external conditions that, filtered through different domestic pressures and concerns, has produced a wide and telling range of political responses to the "China challenge."<sup>1</sup> Bringing together the Visegrád Four, the Baltics, the Western Balkans, selected Black Sea states, and two Eastern Partnership countries – Belarus and Ukraine – allows for tracing how different internal setups and similar external pressures have generated markedly

different outcomes depending on each country's security environment, domestic political trajectory, institutional memberships (EU, NATO, or China–CEE cooperation format – originally known as “16+1”), and depth of economic exposure to China.

**TABLE 1: MEMBERSHIPS OF CEE, SEE AND SELECTED EASTERN PARTNERSHIP COUNTRIES**

| Country                | Subregion            | Part of "16+1" / China-CEEC | NATO member | EU member | Notes                                               |
|------------------------|----------------------|-----------------------------|-------------|-----------|-----------------------------------------------------|
| Albania                | Western Balkans      | Yes                         | Yes         | No        |                                                     |
| Belarus                | Selected former USSR | No                          | No          | No        |                                                     |
| Bosnia and Herzegovina | Western Balkans      | Yes                         | No          | No        |                                                     |
| Bulgaria               | Black Sea            | Yes                         | Yes         | Yes       |                                                     |
| Croatia                | Western Balkans      | Yes                         | Yes         | Yes       |                                                     |
| Czechia                | V4                   | Yes                         | Yes         | Yes       |                                                     |
| Estonia                | Baltics              | No                          | Yes         | Yes       | Withdrew from “16+1” in 2022                        |
| Hungary                | V4                   | Yes                         | Yes         | Yes       |                                                     |
| Kosovo                 | Western Balkans      | No                          | No          | No        | Not part of “16+1”; China does not recognize Kosovo |
| Latvia                 | Baltics              | No                          | Yes         | Yes       | Withdrew from “16+1” in 2022                        |
| Lithuania              | Baltics              | No                          | Yes         | Yes       | Withdrew from “16+1” in 2021                        |
| Montenegro             | Western Balkans      | Yes                         | Yes         | No        |                                                     |
| North Macedonia        | Western Balkans      | Yes                         | Yes         | No        |                                                     |
| Poland                 | V4                   | Yes                         | Yes         | Yes       |                                                     |
| Romania                | Black Sea            | Yes                         | Yes         | Yes       |                                                     |
| Serbia                 | Western Balkans      | Yes                         | No          | No        |                                                     |
| Slovakia               | V4                   | Yes                         | Yes         | Yes       |                                                     |
| Slovenia               | Western Balkans      | Yes                         | Yes         | Yes       |                                                     |
| Ukraine                | Selected former USSR | No                          | No          | No        |                                                     |

# Regional and Country Assessments

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## VISEGRÁD FOUR (V4)

### POLAND: SECURITY-FOCUSED SKEPTICISM AND PRAGMATIC APPROACH

Poland remains one of the clearest cases of a security-first pragmatic approach to China. Since 2022, the relationship has become more tightly filtered through the prism of war in Ukraine, China–Russia partnership, and growing concerns about strategic dependencies. Economic exposure still matters, and Poland has more to lose than most of its regional peers because of the sheer scale of trade with China: according to 2024 data, it runs a trade deficit of roughly €31 billion with China.<sup>2</sup> In 2025, China's share of Polish imports rose from 14.5 to 15.5 percent, with Chinese import value growing more than 13 percent year-on-year.<sup>3</sup> The trend continued into 2026, albeit more slowly: imports from China rose 8.2 percent year-on-year in the first five months, and over the last 12 months combined imports from China and Vietnam reached €67 billion, close to the €71.4 billion sourced from Germany – Poland's traditional largest trading partner.<sup>4</sup> Further, the National Bank of Poland explicitly flagged “growing competitive pressure from China” as a source of disinflation in consumer goods.<sup>5</sup> But pure economic logic no longer sets the political tone.

This became especially visible in September 2025, when Poland's closure of its border with Belarus<sup>6</sup> reportedly paralyzed around 90 percent of China–EU rail freight, affecting an estimated €25 billion annual volume. This episode highlighted how security concerns now clearly override commercial logic in governmental decision-making. The same pattern was visible in February 2026, when Poland banned Chinese vehicles from military facilities,<sup>7</sup> while also taking around 60 percent of Taiwan's drone exports – becoming the world's largest buyer of Taiwanese drones at the time<sup>8</sup> – and announcing a 150-hectare technology park for Taiwanese investors.<sup>9</sup> Defense-industrial cooperation with Taipei was further institutionalized at the 33rd International Defense Industry Exhibition in Kielce in September 2025, where a trilateral Taiwan–Poland–Ukraine framework was signed<sup>10</sup> and the Deputy Chief of the General Staff for Intelligence at the Taiwanese Ministry of Defense, General Jih-Sheng Hsieh, attended the Warsaw Security Forum in full uniform.<sup>11</sup> The Polish EV project illustrates this symbolic geopolitical transition: after earlier ElectroMobility Poland's cooperation with China's Geely, the initiative was in 2026 reoriented toward a Taiwanese partnership with Foxconn.<sup>12</sup> Both strands advanced in May and June 2026: at the Warsaw Taiwan Expo, the planned Taiwanese technology park was confirmed for Miękinia in Lower Silesia – the plot abandoned by Intel – alongside a parallel Foxconn semiconductor project.<sup>13</sup> Chinese industrial FDI has also bifurcated accordingly: Stellantis halted Leapmotor EV assembly in Tychy in March 2025 and although the company did not provide its reasons, one could assume that it was due to Beijing instructing Chinese firms to avoid EU states that voted for EV countervailing duties,<sup>14</sup> while investors

such as Ronbay (cathode production in Konin)<sup>15</sup> and Kingfa (polymers production in Szprotawa)<sup>16</sup> have doubled down on Poland, with the representative of the latter calling Poland a “strategic entry point” for the European market.

The key domestic variable is institutional cohabitation: a government that remains markedly skeptical of Beijing, and a president who could, in theory, be approached by China somewhat differently. The May 2025 presidential election, which brought PiS-backed Karol Nawrocki to office, may prolong a government-president duality that China could try to exploit – as was already visible during Andrzej Duda’s presidency – for example by engaging more with Nawrocki while sidelining Foreign Minister Radosław Sikorski. The latter had already voiced one of the government’s sharper remarks on China in his April 2025 Sejm exposé, where he stated bluntly that “without Beijing’s help, Russia’s economy would have collapsed by now,” urging partners not to turn a blind eye to China’s role in sustaining the war.<sup>17</sup> Such remarks, however, have remained relatively isolated. Sikorski’s broader posture toward Beijing has been more cautious, and his February 2026 exposé devoted little attention to China, suggesting Warsaw remains wary of following the Lithuanian scenario vis-à-vis Beijing. Nawrocki’s own reading is more ambiguous – he is described as a “diplomatic wild card”<sup>18</sup> whose Trump-aligned transatlanticism coexists with relatively warm, yet laconic readouts from his meeting with Wang Yi.<sup>19</sup> But even so, the broader strategic environment remains unfavorable. Poland’s China debate is now subordinated to a larger security worldview in which Russia is the primary threat and China is increasingly seen as part of the wider challenge rather than as a compartmentalized trade partner. This broader strategic posture is also underlined by Poland’s 4.8 percent of GDP defense budget<sup>20</sup> – one of the highest of all NATO members – and by the ongoing tightening of the Chinese FDI screening regime and of 5G rules targeting high-risk suppliers,<sup>21</sup> including the updated cybersecurity act dubbed “Lex Huawei,”<sup>22</sup> which the company had publicly challenged as discriminatory already at the draft stage.<sup>23</sup>

China has responded with continued high-level engagement but little visible breakthrough. Wang Yi’s September 2025 visit to Poland,<sup>24</sup> the first by a Chinese foreign minister in six years, produced no substantive result and was described by some as a “dialogue of the deaf.”<sup>25</sup> Beijing simultaneously accelerated bypass strategies through the Middle Corridor<sup>26</sup> and a new “China–Europe Arctic Container Express” route,<sup>27</sup> not fully excluding Poland,<sup>28</sup> but reducing its structural leverage as a gateway. Working-level contact nonetheless continues. The 8th Poland–China Strategic Dialogue, held in Beijing in June 2026, canvassed a possible high-level visit to mark the 10th anniversary of the “comprehensive strategic partnership” and set out rules for Polish poultry exports.<sup>29</sup> Beijing has also shown a harder edge. In July 2026, retaliating for the EU’s 21st sanctions package against Russia, it placed 14 EU entities on its export control list, among them Wrocław University of Science and Technology and Vigo Photonics – marking the first time Beijing has imposed such restrictions directly on Polish entities.<sup>30</sup> Overall, in the context of Donald Trump’s presidency and Russia’s ongoing war in Ukraine, Poland focuses predominantly on Europe, and its relations with China are likely to remain pragmatic, skeptical, and deliberately cautious. Warsaw keeps working channels open and weighs on the economic gains on offer without closing doors, while security imperatives, cooperation with Taiwan, and EU-level initiatives set clear ceilings on any further tactical opening.

## CZECHIA: SECURITIZED SKEPTICISM DESPITE TALKS OF A LIMITED RESET

Czechia so far also remains one of the more skeptical China cases in the region. Taiwan, coercion, cyber concerns, and the wider context of the China–Russia relationship have all contributed to a marked deterioration of relations in the past.<sup>31</sup> The clearest recent example was the June 2025 disclosure by Czech authorities that Chinese officials had planned intimidation against Taiwan's Vice President Hsiao Bi-khim during her 2024 Prague visit,<sup>32</sup> after which Prague summoned the Chinese ambassador. That episode reinforced the view in Czech institutions that China is not merely a difficult economic partner, but also a political and security problem.<sup>33</sup>

Moreover, in May 2025, the Government of the Czech Republic accused China of cyber-attack against its Ministry of Foreign Affairs,<sup>34</sup> and in July 2025, President Petr Pavel met the Dalai Lama during his visit to India, fully aware that the move would trigger a Chinese protest.<sup>35</sup> Indeed, China announced severing all contacts with the Czech president to which the president's office responded that since there had been no direct communication between Czechia and China at the presidential level, this step would not change anything.<sup>36</sup>

However, following the October 2025 victory in the parliamentary elections, the new government led by Prime Minister Andrej Babiš (ANO) soon opened space for speculation about a tactical easing.<sup>37</sup> In January 2026, then National Security Adviser Hynek Kmoníček publicly announced that Prague was preparing a “certain shift” in relations with Beijing and that a Prime Minister Babiš visit to China was under consideration.<sup>38</sup> Kmoníček's role in this debate should be treated with some caution, not least because he now appears headed for the post of the Czech UN ambassador in New York, which speaks of him falling from Babiš's political favor.<sup>39</sup>

There is still little evidence that Babiš himself has any strong political appetite to invest in a China reset. His government is more sovereigntist, less inclined to increase defense budget spending and less Ukraine-supportive than the previous one, but that does not automatically translate into a pro-China line. The more plausible reading is narrower: Prague has been testing whether it can recover some low-cost economic benefits without paying major geopolitical costs and signal a domestic political break with the value-based foreign policy of the previous government.

In practice, Czech government politicians seem increasingly aware that China has less to offer than what they assumed while they were in opposition. This is consistent with the longer Czech experience documented in earlier work on inflated expectations around China engagement.<sup>40</sup> Today, the gains privately discussed in Prague appear quite modest: more Chinese tourist arrivals, the possible resumption of direct Shanghai–Prague flights, and perhaps some incremental commercial activity.<sup>41</sup> Official Czech channels have in fact been discussing the possible restoration of a direct Shanghai route with China Eastern since February 2026.<sup>42</sup> But these prospective gains remain limited, while the political costs of any visible rapprochement with Beijing – especially friction with Washington – could be substantial. This dynamic was illustrated by Foreign Minister Petr Macinka's reported January consultation with the US Ambassador Nicholas Merricks over Babiš's planned trip to China, during which Macinka signaled a commitment to follow Washington's line on China.<sup>43</sup>

Further developments have complicated the prospects of straightforward return to warmer relations. In January 2026, Czech authorities detained a Chinese national who had worked in Prague as an accredited journalist. In May, prosecutors indicted him for “unauthorized activity for a foreign power,”<sup>44</sup> the first case brought under a new provision of the Czech Criminal Code. At the end of June, Chinese authorities detained a Czech businessman at an airport and later said that he was being investigated on suspicion of endangering national security.<sup>45</sup> When confirming the case, Beijing also denounced the Czech prosecution of the Chinese journalist and demanded his release, publicly placing the two cases side by side. The tension did not prevent Chamber of Deputies Speaker Tomio Okamura from beginning a five-day visit to China on July 20 – the first by a senior Czech political representative since 2019.<sup>46</sup> Yet the trip was criticized by opposition politicians because of its timing while a Czech citizen remained detained and because it risked signaling accommodation before Beijing had addressed Prague’s security concerns.<sup>47</sup>

At the same time, Czechia is not willing to completely cease cooperation with Taiwan, which has become one of the most visible and promising parts of its Indo-Pacific strategy (which, amusingly, does not directly mention Taiwan).<sup>48,49</sup> The most important element is semiconductors. Czech–Taiwanese cooperation in this field has moved well beyond symbolic politics into initial supply-chain building, industrial networking, skills development, and investment promotion. Taiwan has explicitly used chip diplomacy to deepen ties with Central European partners including Czechia, and Prague has leaned into this by repeatedly participating in Semicon Taiwan,<sup>50</sup> promoting the Czech semiconductor ecosystem, and organizing Czech–Taiwanese supplier events. This fits well with Czechia’s broader ambition to embed itself more deeply in the European chip ecosystem, which also includes participating in TSMC investment into the Dresden foundry, US-based Onsemi large-scale expansion in the country,<sup>51</sup> and the establishment of the Czech Semiconductor Center in 2025.<sup>52</sup> Despite a recent recalibration at the Czech government level, Taiwan still offers Czechia something China increasingly does not: a politically acceptable route into a high-value strategic industry.

That is why the recent signals from the Babiš government should not be read as a full break from Taiwan, but rather as an attempt to simultaneously recalibrate relations with China, keep credibility in Washington and manage its relationship with Taipei differently from the previous government. The latter domestic factor may play an inflated role as was visible in April 2026, when Babiš refused to provide a government aircraft for Senate Speaker Miloš Vystrčil’s (from opposition ODS party) planned Taiwan trip and criticized the visit as harmful to Czech economic interests.<sup>53</sup>

Czechia is therefore best understood as a security skeptic with some room for tactical de-escalation, not as a genuine opener to China. Babiš may eventually visit China (likely in spring 2027<sup>54</sup>), but a broader restart of relations is unlikely to materialize in a truly strategic sense. The ceiling on rapprochement is set not by values or rhetoric, but by a more basic conclusion shared in Prague: China offers too little, while the political price of visibly accommodating Beijing may be too high.

## SLOVAKIA: A CLEAR EU-BASED OPENING FOR CHINA

Slovakia under Robert Fico is one of the clearest cases in the region of a government that sees China not merely as a trade partner, but as a politically useful relationship and as a source of industrial opportunity. The turning point toward the government's "all-azimuth" foreign policy came before 2025, when Fico's October–November 2024 visit to China upgraded bilateral ties to a strategic partnership. That visit was treated in Bratislava as a major foreign-policy success: Fico called it the "trip of the year," and the Slovak side traveled with a large business delegation of 77 representatives from 56 companies.<sup>55</sup> The visit also produced a tangible gain: from November 2024, Slovak citizens became eligible for 15-day visa-free entry to China for short-term business, tourism, family visits and transit.<sup>56</sup> The permitted stay was subsequently extended to 30 days, and the scheme is currently valid until the end of 2026. Slovak Foreign Minister Juraj Blanár also presented the visit as the beginning of a more intensive phase of economic cooperation.<sup>57</sup>

What changed after January 2025 was not the direction of policy, but the effort to give it a more structured bilateral format. On February 1, 2025, Fico publicly cited China among the countries with which Slovakia had "qualitatively upgraded" relations to the level of strategic partnership.<sup>58</sup> On January 12, 2026, Bratislava hosted the first meeting of the Slovak–Chinese Intergovernmental Committee for Strategic Partnership, co-chaired by Chinese Vice Foreign Minister Hua Chunying and Slovak State Secretary Marek Eštok. Fico opened the meeting, while Blanár participated and held separate bilateral talks with Hua.<sup>59</sup>

The same logic is visible in Slovakia's new Strategic Concept for Engagement in the Indo-Pacific Region, published in English in January 2026.<sup>60</sup> The document is sober in tone and does not present the country's China policy as a wholesale geopolitical reorientation. Yet it still places China explicitly within Slovakia's Indo-Pacific policy and frames engagement with Beijing in pragmatic economic terms, including investment cooperation, public-private projects, modern technologies with high added value, and improved access for Slovak businesses to the Chinese market. At the same time, the strategy remains careful to stay within the EU consensus: it explicitly mentions China as an important EU partner, warns against trade wars and protectionism, reiterates Slovakia's One China policy, notes that Slovakia does not recognize Taiwan as an independent state but also supports peace and stability in the Taiwan Strait and continued economic and cultural cooperation with Taiwan.

These moves did not go unnoticed by Beijing. It was especially clear in September 2025, when Fico traveled to Beijing for China's World War II anniversary commemorations and military parade as the only EU head of government to attend,<sup>61</sup> and Xi Jinping used their meeting to explicitly urge Slovakia to help improve China–EU relations.<sup>62</sup> The plea came in time of mounting conflict with the EU over Chinese electric vehicles. Slovakia was one of the few EU member states to oppose the bloc's tariffs on China-made EVs.<sup>63</sup> This episode illustrated that Slovakia could be useful not only for bilateral reasons, but as a potentially accommodating voice within EU debates.

In May 2026, Li Hongzhong, a member of the CCP Politburo and vice chairman of the Standing Committee of China's National People's Congress, led a delegation to Slovakia and met President Peter Pellegrini, Fico, parliamentary Speaker Richard Raši

and Deputy Speaker Tibor Gašpar.<sup>64</sup> This was followed by Pellegrini's state visit to China on July 27–29. During his talks with Xi, Pellegrini welcomed further Chinese investment and identified artificial intelligence, the digital economy, robotics, clean energy, science and research as priority areas. He also argued against responding to EU–China trade disputes through a trade war or isolation. Xi, in turn, again asked Slovakia to play a constructive role in managing China–EU disagreements.<sup>65</sup> However, the official readouts have announced political commitments and prospective areas of cooperation rather than major new commercial agreements.

This opening is also tied to industrial policy, especially Slovakia's effort to defend and upgrade its automotive manufacturing base amid the shift to electric mobility. The battery plant in Šurany Industrial Park, developed by a joint venture between Chinese battery maker Gotion and Slovak firm InoBat,<sup>66</sup> is one important example: the Slovak–Chinese joint venture is expected to invest around €1.2 billion, with pilot production scheduled for September 2026 and the start of serial production scheduled by the end of 2027.<sup>67</sup> But the broader picture is not limited to Šurany. Volvo Cars, majority-owned by China's Geely Holding, is also building a major electric vehicle plant near Košice, with planned annual capacity of around 250,000 cars, now expected to start in early 2027.<sup>68</sup> Taken together, these projects help explain why Bratislava has strong incentives to keep Chinese-linked battery and EV investment channels open.

That said, Slovakia cannot be seen as simply following the model pioneered by the former Hungarian government of Viktor Orbán. Slovak Prime Minister Fico is clearly more open to China than most EU leaders in the region, but there are also signs of caution. Unlike Hungary under Orbán, Slovakia is not the central regional focal point of attention for Washington, Beijing, and Moscow all at once. That gives Bratislava more room for calibrated positioning, but it also creates incentives not to overplay the China card. At the same time, this caution should not be mistaken for a broadly pro-Western correction: Fico's government has repeatedly taken positions that are more accommodating toward Russia than the EU mainstream, including halting Slovakia's military aid to Ukraine, criticizing Western sanctions, and maintaining high-level contacts with Moscow.<sup>69</sup> This makes Slovakia's China opening part of a wider sovereigntist posture that often challenges the EU's mainstream foreign-policy line. It is too soon to predict how the defeat of Orbán in Hungary, resulting in the shift of EU attention away from Budapest and an increase in the visibility of Slovakia as one of the remaining sovereigntist outliers inside the EU,<sup>70</sup> will play out.

The relationship with China is politically warmer and institutionally denser than in most of the region but still bounded. Slovakia is not anti-Western, and it is not seeking a Serbian-style strategic embrace of China. Rather, Fico appears to treat China as useful in three narrower ways: as a source of industrial investment, as a partner in trade diversification beyond the EU core, and as a means of strengthening Slovakia's bargaining space within Europe. The risk, however, is that this China policy becomes increasingly embedded in a broader pattern of selective alignment with actors willing to challenge EU and transatlantic consensus, especially Russia. That is why Slovakia fits best among political openers: not because it has abandoned its Western anchoring, but because under Fico it has become one of the EU cases most willing to turn the China relationship into an active political and economic asset.

## HUNGARY: POST-ORBÁN REPRIORITIZATION AMID EMBEDDED CHINA TIES

Hungary entered 2025 as Beijing's closest political partner within the EU. Under Viktor Orbán, Budapest followed its “Opening to the East” strategy which combined unusually close political relations with Beijing, support for China’s position in the EU,<sup>71</sup> and an effort to establish Hungary as a European manufacturing hub for Chinese electric-vehicle and battery companies.<sup>72</sup>

The economic relationship became particularly deeply embedded in Hungary’s automotive and battery industries. In 2025, CATL announced a €7.3 billion investment in a battery plant in Debrecen which was designed to supply European manufacturers including BMW, Stellantis, and Volkswagen and expected to employ approximately 9,000 people.<sup>73</sup> BYD, meanwhile, began constructing its first European passenger-car factory in Szeged and announced a European headquarters and research and development center in Budapest in May 2025, with plans to create approximately 2,000 jobs.<sup>74</sup> In June 2025, the company announced a further \$94 million expansion of its existing electric-bus and truck plant in Komárom, supported by a Hungarian government grant.<sup>75</sup> These investments made Hungary one of the principal destinations for Chinese investment in Europe and tied Chinese capital to employment, regional development, and the future of the country’s export-oriented automotive sector.<sup>76</sup>

The decisive political change came in the parliamentary election held on April 12, 2026. Péter Magyar’s center-right Tisza party defeated Fidesz after 16 years of uninterrupted Orbán government.<sup>77</sup> Once all domestic, postal, and overseas ballots had been counted, Tisza held 141 of the National Assembly’s 199 seats, giving the new government a two-thirds parliamentary majority.<sup>78</sup> Magyar subsequently took office as prime minister in May 2026.

Magyar should nevertheless not be treated as a complete outsider to the former governing system. Before breaking with Fidesz in 2024, he had been married to Orbán’s former justice minister, Judit Varga, served as a diplomat and state official, and held senior positions in state-linked institutions and companies.<sup>79</sup> His campaign focused predominantly on corruption, deteriorating public services, economic stagnation, and Hungary’s isolation within the EU. He did not campaign on terminating relations with China. Following the election, he pledged to restore democratic standards, reform state institutions, and anchor Hungary more firmly within Europe.<sup>80</sup>

The new government’s initial priorities reflected that domestic and European agenda. It adopted rule-of-law and anti-corruption measures that enabled the European Commission to unlock €16.4 billion in previously frozen EU funding in late May.<sup>81</sup> Hungary also requested to join the European Public Prosecutor’s Office, becoming its 25th participating member in July 2026.<sup>82</sup> Relations with Ukraine became less confrontational, including through an agreement addressing the rights of Hungary’s ethnic minority in Ukraine. At the same time, Budapest retained several red lines: it ruled out sending Hungarian troops or weapons to Ukraine and declined to participate in the €90 billion EU loan, although it no longer prevented the other 24 member states from proceeding through enhanced cooperation.<sup>83</sup> The post-Orbán shift should therefore be understood as a reduction in systematic obstruction and an effort to repair relations with Brussels – not as automatic alignment with the EU.

A similarly selective pattern has emerged in China policy. Shortly after the election, Magyar said that his government would review major Chinese investments but would not seek to prevent or terminate them as a matter of principle. He explicitly indicated that companies including BYD and CATL would remain welcome, provided that they complied with Hungarian environmental, labor, and transparency requirements and created greater opportunities for Hungarian firms.<sup>84</sup> This suggests that the new government distinguishes between Chinese investment as such and the opaque or politically privileged terms under which particular agreements were concluded by its predecessor.<sup>85</sup> The shift also extends beyond the review of individual agreements. The government has announced a new environmental watchdog, stricter standards and turnover-based pollution fines, signaling that Chinese EV and battery investments will remain welcome but face substantially tighter regulatory oversight.<sup>86</sup>

That distinction became visible in July 2026, when former Foreign Minister Péter Szijjártó resigned from parliament to accept an executive position at BYD. Szijjártó had played a central role in negotiating the company's Hungarian investments and the government subsidies attached to them, prompting Magyar to accuse him of representing foreign interests.<sup>87</sup> The government subsequently opened an investigation into the state support, permits, environmental concessions, and possible conflicts of interest connected to the BYD agreements.<sup>88</sup> The inquiry indicates that Chinese projects will not necessarily be dismantled but may be subjected to stronger scrutiny where they intersect with the government's broader anti-corruption and transparency agenda.

The Budapest–Belgrade railway represents another potential point of contention. The Hungarian section has been financed predominantly through a Chinese loan, while the construction contract benefited a company controlled by Lőrinc Mészáros, a businessman closely associated with Orbán.<sup>89</sup> Magyar criticized the project after the election, arguing that it relied on Chinese financing, technology, and labor while offering questionable benefits to Hungary and diverting resources from the country's deteriorating domestic railway network.<sup>90</sup> However, the project's advanced stage, financial commitments, and sunk costs make outright cancellation less likely than an investigation of its contracts, costs, and distribution of benefits.

Hungary should therefore be treated as a case of post-Orbán reprioritization rather than an imminent anti-China turn. The infrastructure for continued ties with China so far remains in place because it is already embedded in industrial policy, local economic expectations, job market, and sunk political commitments. What changes is not necessarily the existence of the relationship, but its ranking in Hungary's foreign-policy hierarchy. Under Orbán, ties with China had clear regime-level value. Under Magyar, they are more likely to become secondary.

China's future institutional position within the Foreign Ministry also remains unclear. While the Orbán government maintained a dedicated China department, according to information obtained by China Observers in Central and Eastern Europe (CHOICE) in Budapest, the emerging structure is likely to place China within a broader East Asian portfolio, reflecting reduced political exceptionalism rather than disengagement.

The evidence available during the new government's first months points toward less political advocacy on Beijing's behalf, closer attention to EU compatibility and domestic accountability, and continued acceptance of Chinese investment where it

is considered economically beneficial. However, it remains too early to determine whether these initial steps will develop into a coherent long-term approach to China. Whether this selective continuity proves sustainable will depend on the outcome of reviews of individual projects, future EU measures affecting Chinese investment, and the availability of credible alternative sources of capital and industrial development.

## BALTICS

### LITHUANIA: SOFTENING ON CHINA WITHOUT GIVING UP TAIWAN

Lithuania remains one of the region's most politically visible China cases, but in 2026 the direction of travel reversed. After five years of escalation, Vilnius seems to be looking for a way back to workable relations with Beijing that does not require giving up Taipei. This softening began already under the previous Prime Minister Gintautas Paluckas and has continued under his successors. Inga Ruginienė's government formally aimed to "restore diplomatic relations with China to the level seen in other EU member states."<sup>91</sup> In early 2026, she described the decision to permit the establishment of the Taiwanese Representative Office in Vilnius as a "strategic mistake," saying that by doing so, Lithuania had "jumped in front of the train."<sup>92</sup> But, in March 2026, President Gitanas Nausėda pushed back against reopening the issue<sup>93</sup> and declared it "settled." This softening has since deepened. Mindaugas Sinkevičius, who replaced Ruginienė in July 2026, made normalizing diplomatic relations with China a formal goal of his government program.<sup>94</sup> Nausėda has moved with him, but called on Minister of Foreign Affairs Kęstutis Budrys to pursue normalization alongside existing commitments to Taipei.<sup>95</sup>

Cooperation with Taiwan thus continues, though unevenly: Taiwanese investments in a Lithuanian fintech firm and ties in lasers have moved forward,<sup>96</sup> while cooperation on semiconductors has lagged behind earlier expectations.<sup>97</sup> Alongside, former Lithuanian Foreign Minister Gabrielius Landsbergis received Taiwan's Order of Brilliant Star,<sup>98</sup> and Lithuania's defense cooperation with Taiwan<sup>99</sup> and the Philippines<sup>100</sup> has deepened – though it reflects Vilnius's broader security posture rather than its China policy directly. The Lithuanian Intelligence 2026 National Threat Assessment also highlighted China's expanding cooperation with Russia and warned of Chinese intelligence activities, data collection, and information censorship posing security risks to Lithuanian citizens.<sup>101</sup>

On the other hand, Beijing's approach has combined limited rhetorical engagement with no substantive concessions. In early 2025, Chinese signaling was still moderately positive – including a piece by a Chinese diplomat published in Lithuanian media<sup>102</sup> – but Beijing's tone hardened as Vilnius's stronger line became clear, notably after Lithuania's refusal to re-admit a returning Chinese diplomat in May 2025.<sup>103</sup> Furthermore, in August 2025 China responded to the EU sanctions by specifically targeting two Lithuanian banks<sup>104</sup> and extended the pattern in July 2026 by placing the Lithuanian laser manufacturer Ekspla UAB on its export control list.<sup>105</sup> It reportedly still maintains zero diplomatic staff in Vilnius<sup>106</sup> amid an ongoing dispute over accreditation and status. However, in June 2026 Vilnius narrowed that dispute

from its own side, offering to accept the chargé d'affaires office it had previously refused and agreeing on arrangements to provide consular services, leaving the ball in Beijing's court.<sup>107</sup> As opposed to these political tensions, bilateral trade – historically modest and imbalanced – shifted back toward a business-as-usual model with Lithuania's imports from China growing significantly in 2025.<sup>108</sup>

Lithuania's past hard line on China is clearly softening, but Vilnius is trying to pursue this path without giving up on Taiwan. The government and the president now seem to agree on normalization, and both aim to pursue it through increased diplomatic representation rather than by challenging the Taiwanese office, while defense and technology ties with Taipei carry on. So far, Beijing has taken that opening without giving much back, widening its restrictive measures instead.

## LATVIA: LOW-PROFILE PRAGMATISM UNDER STRONG WESTERN DISCIPLINE

Latvia is the quiet pragmatist among the Baltic cases. It remains firmly transatlantic and cautious on security questions, but it has stronger incentives than some of its neighbors to maintain usable diplomatic channels with China, especially because of its multilateral profile and preference for “no-drama” foreign policy.

A key reason is Latvia's participation in the UN Security Council (UNSC),<sup>109</sup> with its term beginning in January 2026. Membership in the Council creates an additional incentive to preserve working diplomacy with China as a permanent member, encouraging a more functional and moderated tone than in some of its neighboring states. In its first 100 days on the Council, Latvia has consistently voted with its European partners on Ukraine and has co-sponsored resolutions opposed or vetoed by Russia and China, including on the Strait of Hormuz. Latvia will hold the UNSC presidency in November 2026, with the rules-based order, exposing Russian war crimes, and hybrid threats as declared priorities.<sup>110</sup> The result is not strategic openness to Beijing, but a functional relationship embedded in larger institutional frameworks.

At the same time, Latvia does not ignore China-related risks. Latvian intelligence has reportedly flagged Chinese influence operations<sup>111</sup> targeting the academic and scientific communities, politicians, entrepreneurs, and the cultural sector through paid trips – a modus operandi that is increasingly visible across CEE and SEE, especially in the Western Balkans. The 2025 Latvian State Security Service annual report goes further, describing such trips as part of China's systematic effort to build “long-term positions of influence” and concluding that those returning often become “lobbyists for China's interests” – sometimes unknowingly.<sup>112</sup> Further, China's Ambassador to Latvia Tang Songgen has actively tried to frame Beijing as a “predictable” partner in contrast to the US unpredictability.<sup>113</sup> In the absence of high-visibility links, Ambassador Tang has also engaged in sub-national diplomacy – visiting local municipalities and pursuing sectoral outreach<sup>114</sup> – which was seen in Latvian expert communities as aiming at exploring the country's vulnerabilities. Nonetheless, these efforts do not seem to override Latvia's larger Western alignment. Riga continues to deepen informal ties with Taiwan, with the Latvia-Taiwan Parliamentary Friendship Group visiting Taipei in August 2025.<sup>115</sup> On defense, the Latvian parliament approved a 2026 bud-

get of €2.16 billion, or 4.91 percent of GDP – the largest in Latvian history – with a further rise to 5 percent planned for 2027.<sup>116</sup>

Latvia therefore fits best into the category of managed pragmatism: functional engagement without strategic trust, underpinned by a strong security posture and a clear-eyed reading of Chinese influence tools.

## ESTONIA: BALANCING SECURITY CAUTION AND DIPLOMATIC ENGAGEMENT

Among the Baltic states, Estonia has been the most attentive to the security dimension of its relations with China, while continuing to pursue formal diplomatic engagement. The cumulative effect of China–Russia cooperation, cable-security concerns, debates about data exposure, and Estonia's close attention to technological vulnerabilities has broadened Tallinn's approach to Beijing beyond a pure orientation toward trade.

Already in 2023, the Estonian Internal Security Service (KAPO) had been flagging the ideological alignment between Moscow and Beijing, alongside Chinese interest in Estonian elections and the IT and digital-governance sectors.<sup>117</sup> The turning point, however, came with the November 2024 Yi Peng 3 cable-cutting incident,<sup>118</sup> which helped transform China's public image from a relatively distant concern into a more immediate potential security threat. In November 2025, Foreign Minister Margus Tsahkna visited Beijing<sup>119</sup> – the first Estonian foreign minister visit in a decade – and although he did not officially mention the cable-cutting incident, he explicitly called on China to join the US and EU in putting pressure on Putin over the war in Ukraine,<sup>120</sup> flagging China's leverage<sup>121</sup> and highlighting that Chinese firms supplying Russia's defense industry would risk secondary sanctions.<sup>122</sup> He also publicly welcomed a reciprocal trip by China's foreign minister to Tallinn – a balancing act of stronger engagement with Beijing on Russia while keeping channels of formal diplomacy open.

At the same time, Estonia has expanded practical links with Taipei. In May 2025, it signed memoranda of understanding on defense, aerospace, and drones with Taiwan.<sup>123</sup> Estonia's 2026 intelligence report has also drawn attention to Chinese technology-related risks, including a dedicated China chapter that frames Beijing and Moscow as “allies without a treaty” and tests DeepSeek against politically sensitive questions, where roughly 80 percent of responses reproduced official Chinese talking points.<sup>124</sup> The Estonian Information System Authority (RIA) separately flagged BYD vehicles and TikTok transmitting data to Chinese servers and the dominance of Chinese solar inverters and routers as potential security issues.<sup>125</sup> The KAPO added in its 2025–2026 review that China has funded visits for Estonian politicians, cultural figures, experts, journalists, and content creators, while its embassy has paid local firms for public relations services and the Estonian–Chinese Chamber of Commerce has approached technology companies through the staff responsible for their technology rather than their executives.<sup>126</sup>

Estonia's relatively modest economic dependence on China gives it more room than larger economies to be more selective in its engagement with Beijing. Bilateral trade in 2025 reached around €1.07 billion, which remains a small fraction of

Estonia's overall external exposure.<sup>127</sup> This freedom of maneuver operates against the backdrop of one of the region's sharpest security postures, driven primarily by the Russia threat – Tallinn committed in March 2025 to raising defense spending to at least 5 percent of GDP from 2026.<sup>128</sup> Beijing's room for maneuver in Estonia is therefore comparatively constrained, and for Tallinn, the China question is increasingly handled through the prism of Russia rather than as a stand-alone issue. The relations are likely to remain cool but functional, with their trajectory hinging on Beijing's posture toward Moscow.

## BLACK SEA STATES

### BULGARIA: FRAGMENTED ENGAGEMENT GIVING WAY TO POLITICAL WARMING

Bulgaria moved from fragmented, predominantly economic engagement under the government of Rosen Zhelyazkov toward more explicit political warming under Prime Minister Rumen Radev, who took office in May 2026. The shift was visible in rhetoric, diplomatic attention, and Bulgaria's broader turn toward transactional hedging, but had not yet produced the large-scale projects or strategic alignment associated with Hungary or Serbia.<sup>129</sup> Bulgaria is thus still best understood as a managed pragmatist, with the potential to become a political opener toward China.

The Zhelyazkov government's approach was most clearly reflected in the resumption of the Bulgarian–Chinese Commission on Economic Cooperation in September 2025, following a five-year interruption caused by the COVID-19 pandemic.<sup>130</sup> The talks focused on expanding Bulgarian exports, balancing bilateral trade and attracting Chinese investment in higher-value-added sectors. Economy and Industry Minister Peter Dilov explicitly placed the relationship within the context of Bulgaria's EU and Schengen membership.<sup>131</sup> The meeting was accompanied by a business forum involving more than 85 Bulgarian and 35 Chinese companies. Dilov reported that bilateral trade had reached nearly \$4 billion in 2024 and approximately \$2 billion in the first half of 2025.<sup>132</sup>

Bulgaria's formal economic diplomacy during this period did not, however, amount to a coherent national China policy. Chinese engagement remained limited compared with Hungary or Serbia, and China was neither a major investor nor an alternative to the EU as Bulgaria's principal source of development funding. Interest in closer economic cooperation failed to translate into a consistent strategy, while prospective commercial benefits often received more attention than the associated security and dependency risks.<sup>133</sup>

This fragmentation created opportunities for Chinese state and corporate actors to cultivate relationships with universities, schools, municipalities, cultural institutions and business organizations, extending their presence beyond national-level diplomacy.<sup>134</sup> Commercial activity was also becoming more diversified, shifting toward smaller initiatives involving automotive components, product development, research cooperation and e-commerce, and away from the large, loan-financed infrastructure projects pursued elsewhere in the region.<sup>135</sup>

The absence of a coherent China strategy was also reflected in uneven political signaling within the Zhelyazkov government. Two visits to China by the Deputy Prime Minister and Bulgarian Socialist Party (BSP) Chairman Atanas Zafirov illustrated this divide. In May 2025, Zafirov led a government delegation to the China–CEEC Expo in Ningbo. During the same visit, he met Shanghai Mayor Gong Zheng and called for deeper dialogue, increased Chinese investment, improved access for Bulgarian products, and direct air and transport links.<sup>136</sup> In September, however, he returned as the head of a BSP–United Left delegation invited by the Chinese Communist Party. He attended Beijing’s military parade and had a brief exchange with Xi Jinping. Prime Minister Zhelyazkov publicly distanced the government from this second visit, stressing that Zafirov and Regional Development Minister Ivan Ivanov were traveling while on leave and that the trip was a party initiative.<sup>137</sup> The episode therefore illustrated the persistence of a politically warmer BSP–CCP channel rather than evidence of a coordinated government approach to China or a broader turn toward warmer political relations with Beijing.

The political transition in spring 2026 created the possibility of a different trajectory. Former President Rumen Radev – who in 2019 had signed the joint declaration elevating Bulgaria–China relations to a strategic partnership – won the April parliamentary election and became prime minister in May. Reuters described Radev as Russia-friendly and Euroskeptic, but also cited analysts who considered it unlikely that he would jeopardize Bulgaria’s access to EU funding.<sup>138</sup> At the same time, after taking office, Radev declared his intention to follow a European path and pledged to meet Bulgaria’s NATO commitments, including through higher defense spending.<sup>139</sup>

Radev’s wider foreign-policy positioning pointed toward transactional hedging. When Chinese State Councilor Shen Yiqin visited Sofia in June 2026, Radev described China as a “trusted friend and strategic partner” of Bulgaria in Asia, called for greater pragmatism and more Chinese investment, and expressed interest in establishing a direct air connection.<sup>140</sup> He also welcomed an invitation to visit China and said that the Bulgarian delegation would present concrete proposals for further cooperation. Shen additionally met President Iliana Iotova and Deputy Prime Minister Galab Donev, while the two sides signed an interdepartmental memorandum of understanding on cooperation in labor and social policy.<sup>141</sup>

So far, these exchanges have not produced a major investment or substantive bilateral agreement. Bulgaria is therefore still best classified among the managed pragmatists: economically receptive and increasingly politically engaged, but characterized by fragmented decision-making, weak awareness of China-related risks and a growing range of relationships outside the central government. Radev’s early outreach points to possible political warming, but reclassification as a political opener would require sustained high-level engagement and concrete policy outcomes rather than rhetoric alone.

## ROMANIA: SECURITY-FIRST CONTINUITY WITH SELECTIVE ECONOMIC ENGAGEMENT

Romania's China policy after January 2025 was characterized by continuity rather than a major shift. The election of Nicușor Dan as president and the formation of Ilie Bolojan's pro-European government consolidated a security-first trajectory established several years earlier. Although Bolojan's government was toppled in May 2026 and remained in office in a caretaker capacity through the end of the period under review,<sup>142</sup> the ensuing political crisis did not produce a discernible change in China policy. Romania's approach became more visible in its treatment of strategic dependencies, foreign investment screening and the cautious normalization of unofficial relations with Taiwan. At the same time, Bucharest maintained functional diplomatic ties with Beijing and pursued economic cooperation in non-strategic sectors. Romania therefore remained a security-first skeptic rather than moving toward comprehensive economic disengagement from China.

The presidential election of May 18, 2025, strengthened Romania's Western anchoring at a moment when the country's foreign-policy orientation was contested.<sup>143</sup> Dan defeated the hard-right George Simion by 54 percent to 46 percent, campaigning on continued support for Ukraine and Romania's place within the European mainstream.<sup>144</sup>

His victory did not in itself represent a change in China policy. Romania had already excluded Huawei from the development of its 5G networks, ended Chinese participation in the Cernavodă nuclear project, restricted Chinese companies' access to public procurement and strengthened its foreign investment screening.<sup>145</sup> This course remained unchanged under Marcel Ciolacu's governments. In February 2024, the government formally rejected Huawei's application to supply 5G infrastructure equipment following a national-security assessment by the Supreme Council of National Defense.<sup>146</sup> Otherwise, the period preceding the election brought no significant high-level engagement or strategic opening toward China.<sup>147</sup> Rather, Dan's election reduced the likelihood that this security-oriented approach would be weakened and reinforced the broader Euro-Atlantic framework within which relations with China were managed.

The political consolidation that followed the election nevertheless proved temporary. Bolojan's four-party pro-European coalition took office in June 2025, but the Social Democratic Party withdrew from the government in April 2026, and parliament toppled the cabinet in a vote of no confidence on May 5.<sup>148</sup> Bolojan subsequently remained in office as caretaker prime minister while attempts to form a new government failed.<sup>149</sup> The crisis was driven primarily by disputes over austerity measures, fiscal consolidation and access to EU funds rather than foreign policy, and it did not lead to an observable change in Romania's approach to China during the period under review.

Romania's wider security agenda remained dominated by Russia's war against Ukraine and the protection of the Black Sea region. Romania said it wanted to host the planned EU Black Sea Maritime Security Hub,<sup>150</sup> while the new national defense strategy<sup>151</sup> called for new Black Sea cooperation initiatives, particularly with Turkey and Bulgaria, to protect surface and subsea energy and communications infrastructure.<sup>152</sup>

The strategy mentioned China in its discussion of global strategic competition but did not designate it as a separate security threat.<sup>153</sup> When presenting the draft in November 2025, Dan nevertheless explained that China loomed large in its treatment of critical-resource supply chains.<sup>154</sup> In the same remarks, he described China as an important global economic actor, called for strict limits where Romania's security interests were involved and rejected an abrupt rupture of bilateral economic relations.<sup>155</sup> Romania's position thus combined security awareness and diversification in strategic sectors with continued commercial pragmatism.

This balance was also reflected in a March 2026 overhaul of Romania's foreign investment screening regime. The reform raised the mandatory notification threshold from €2 million to €5 million and streamlined the review process. At the same time, it clarified the inclusion of asset acquisitions in sensitive sectors, retained the authorities' power to review below-threshold transactions that could affect national security, public order or EU projects, and introduced an anti-circumvention rule for linked transactions.<sup>156</sup> Although country-neutral rather than directed specifically at China, the reform preserved the government's ability to scrutinize foreign involvement in strategic sectors.

Bilateral relations with Beijing remained formally cordial but politically limited. Xi Jinping congratulated Dan on his election in May 2025.<sup>157</sup> However, the Romanian government declined an official invitation to the September military parade in Beijing. Former Prime Minister Adrian Năstase and Viorica Dăncilă attended in a private capacity and appeared in a group photograph with Xi Jinping, Vladimir Putin and North Korean leader Kim Jong Un. Foreign Minister Oana Țoiu publicly stressed that they did not represent Romania and presented the government's absence as a clear separation from Putin.<sup>158</sup> This episode highlighted the persistence of warmer China ties among some former Social Democratic officials, but also the distance between these networks and the policy of the current government. Functional engagement nevertheless continued. In November 2025, China extended visa-free entry for Romanian ordinary-passport holders through the end of 2026.<sup>159</sup>

A more consequential development was the gradual normalization of Romania's unofficial relations with Taiwan. In August 2025, a six-member multiparty delegation of Romanian legislators led by Senator Cristian Ghinea, a Romanian co-chair of the Inter-Parliamentary Alliance on China, visited Taiwan.<sup>160</sup> The following month, nine parliamentarians from all four parties in the governing coalition called for representative offices, closer investment cooperation and stronger bilateral ties.<sup>161</sup> On October 7, the Ministry of Foreign Affairs issued an order explicitly including ordinary Taiwanese passports among the travel documents accepted by Romania. Although essentially an administrative measure, it removed a longstanding anomaly in Romania's treatment of Taiwanese visitors and brought the country closer to common European practice.<sup>162</sup> The step did not challenge Romania's One China policy but signaled a greater willingness to develop practical ties with Taiwan.

Despite these adjustments in relations with China, Romania's strategic caution did not preclude cooperation in less sensitive sectors. In March 2026, Agriculture Minister Florin Barbu visited Beijing and signed a five-year memorandum on agricultural cooperation covering food security, agri-food processing, research, technology transfer and investment. During the same visit, the head of Romania's National San-

itary Veterinary and Food Safety Authority signed three protocols regulating access to the Chinese market for Romanian dairy products, heat-treated poultry meat and wild aquatic products.<sup>163</sup>

Romania therefore remained firmly within the security-first skeptic category. Dan's election reinforced the country's Euro-Atlantic alignment, while the political crisis that toppled Bolojan's government in May 2026 introduced renewed domestic uncertainty without altering China policy. Developments concerning Taiwan and the continued refinement of investment screening gave the security-first approach a more concrete form. Yet this was not a policy of wholesale disengagement. Chinese involvement in strategic sectors remained restricted or closely scrutinized, whereas diplomatic contacts and economic cooperation continued where they were considered compatible with Romania's national interests.

## WESTERN BALKANS

### ALBANIA: PRO-WESTERN ALIGNMENT WITH SELECTIVE ECONOMIC OPENNESS

Albania remains unwaveringly aligned with the US, NATO and the EU.<sup>164</sup> This strategic alignment serves as a clear boundary that sharply limits the role China can play beyond being an economic partner of convenience.<sup>165</sup> While Albania maintains economic interactions with China, its trajectory in 2025 and 2026 thus far does not indicate any meaningful shift toward a greater geopolitical engagement with Beijing.

Indeed, Albania maintains a policy of selective economic openness toward China within strict political parameters that safeguard its Western alliances. This approach is clearly reflected in Albania's economic statistics. As of 2025, China is Albania's principal trading partner, particularly regarding imports. However, there are no publicly available data indicating Chinese debt, which likely suggests the figure is zero, signaling that China exerts minimal influence on Albania's overall economy.<sup>166</sup> Additionally, no significant new economic agreements have been signed between the two nations in 2025 or 2026 to date.

It is clear then that the Trump January 2025 reelection produced no meaningful shift within this dynamic. Nor will the recent Tirana call for deepening of the bilateral economic agenda. The call followed a May 2025 national election in which Prime Minister Edi Rama's Socialist Party secured a fourth consecutive victory and expanded its parliamentary majority – signaling a continuity of the internal political scene and that of its international posture too.<sup>167</sup> A few months later, during the “Albania, a New Frontier” conference held in Vienna in the fall of 2025, Rama emphasized Albania's readiness to deepen economic cooperation with China.<sup>168</sup> Yet despite this publicly proclaimed willingness to collaborate economically, Albania's alignment with the EU and the US continues to serve as the definitive boundary for its relationship with China. In other words, the strategic anchoring in Western alliances is expected to remain firm, ensuring that enhanced economic interactions do not lead to a revision of Albania's core geopolitical partnerships.

Against this backdrop, China's approach is likely to remain measured. China is likely to welcome Albania's more pragmatic tone and appreciate the renewed signals

of economic cooperation, but it has little reason to expect a strategic breakthrough in the relationship. In this context, Albania's posture is best described as cautious pragmatism – willing to explore opportunities within the economic sphere, while firmly maintaining its established strategic boundaries and a clear preference for autonomy over dependency.

## BOSNIA AND HERZEGOVINA: POLITICALLY FRAGMENTED, BROADLY ENGAGED

Bosnia and Herzegovina does not exhibit a uniform “pro-China” stance. Instead, the country's political environment is characterized by fragmentation and internal division which create opportunities for China to engage strategically. China is able to leverage the overall weak state capacity and in particular political openings associated with Republika Srpska, whose positions it supports within Bosnia and Herzegovina.<sup>169,170</sup> As a result, Bosnia and Herzegovina remains analytically significant despite the lack of a cohesive national China strategy.

It is important to note here that Chinese influence in Bosnia and Herzegovina demonstrates notable resilience, especially when compared to other countries in the Western Balkans where Beijing's presence has waned in recent years. According to the 2025 China Index, China's influence saw a decline throughout much of the region, with the exception of Serbia and Bosnia and Herzegovina. Within Bosnia and Herzegovina, Chinese engagement is especially visible in Republika Srpska.<sup>171</sup>

But its cultural and economic presence is significant in the Federation too. In Bosnia and Herzegovina as a whole, the year 2025 saw a surge in trade with China, record numbers of Chinese tourists, and the advancement of existing infrastructure and investment projects.<sup>172</sup> Data for 2025 also show a significant increase in Bosnia and Herzegovina's exports to China<sup>173</sup> and a continued, strong, non-tendered involvement of Chinese firms in the Srpska entity.<sup>174</sup> But the recent reporting warns that the transparency issue is not limited to Republika Srpska.<sup>175</sup> Importantly, in 2025, China and Bosnia and Herzegovina marked a significant milestone by celebrating the 30th anniversary of their diplomatic relationship, with both sides reiterating commitment to further deepening bilateral relations.<sup>176</sup>

And indeed, 2026 kicked off with mutual announcements of cooperation under China's 15th Five-Year Plan.<sup>177,178</sup> In April 2026, the Federation of Bosnia and Herzegovina signed a memorandum of understanding with China Sinopharm International Corporation envisaging approximately €100 million in investments to modernize the Clinical Center University of Sarajevo and the Cantonal Hospital in Livno.<sup>179</sup> In June, construction officially began on the 17-kilometer Brčko–Bijeljina motorway section in Republika Srpska, part of the strategic project to build a highway connecting Belgrade and Banja Luka. The project is being carried out by a Chinese consortium led by China Overseas Engineering Group (COVEC) and China Tiesiju Civil Engineering Group, with financing backed by China Construction Bank.<sup>180</sup> Also in June, the Research Center on Building a Community with a Shared Future for Humanity was inaugurated in Sarajevo by the Chinese Embassy in Bosnia and Herzegovina and local partners, marking a new platform for bilateral academic and research cooperation.<sup>181</sup>

However, in the context of Bosnia and Herzegovina's fragmented political landscape, China's engagement is best understood through the lens of state weakness. China operates within the permissive environment created by multiple centers of authority, limited transparency, and entrenched external patronage networks, allowing it to advance specific interests within a divided system while avoiding deep entanglement or overcommitment.

## CROATIA: SELECTIVE ECONOMIC PRAGMATISM WITHIN DEFINED EURO-ATLANTIC PARAMETERS

Croatia demonstrates a consistent strategic focus as a member of both the EU and NATO. As a consequence, it does not view China as a viable geopolitical alternative, but it acknowledges the advantages of engaging with China on economic terms in a selective capacity. This pragmatic stance is reflected in Croatia's sustained efforts to fortify bilateral economic relations, particularly in areas such as infrastructure, tourism, and green transformation, all while upholding its established Euro-Atlantic orientation.<sup>182</sup>

The Trump reelection in January 2025 produced no discernible impact on this dynamism. Throughout 2025 and into 2026, Croatia maintained its measured approach without altering its strategic posture toward China, while the bilateral relationship remained active. What is more, in 2025, Croatia and China commemorated 20 years of their “comprehensive cooperative partnership,” both reaffirming intentions to deepen ties. The anniversary occasioned a significant uptick in high-level meetings and official visits, including Croatian Foreign Minister Gordan Grlić Radman's visit to China – the first at this level in 12 years. During his visit, Radman characterized the Croatia–China partnership as “excellent and expanding.”<sup>183</sup> While at a related meeting, Wang Yi emphasized Croatia's importance as China's strategic partner within the EU.<sup>184</sup> Discussions during the visit focused on expanding trade and investment cooperation, with Chinese engagement particularly oriented toward green energy and infrastructure projects, while Croatia sought greater access for its agricultural and high-tech exports to the Chinese market.<sup>185</sup>

This momentum was sustained through other frequent visits and inter-governmental exchanges.<sup>186</sup> In addition, 2025 saw the signing of multiple international treaties and agreements between the two nations, as well as the launch of many notable initiatives, including a solar power project in Korlat, a new expressway contract, and a scientific cooperation agreement.<sup>187</sup> Throughout 2025, Chinese diplomatic communications identified and referred to “infrastructure” and “green transition” as central pillars of the bilateral engagement.<sup>188</sup>

The trend continued in 2026, as evidenced by the February 2026 meeting between Croatian Ambassador to China Dario Mihelin and Chinese Vice Foreign Minister Hua Chunying, during which both sides emphasized the friendly and stable nature of bilateral relations and highlighted the importance of deepening economic cooperation.<sup>189</sup> Scientific cooperation also advanced: on May 15, China's Capital Normal University and the Croatian Institute of History inaugurated a joint Center for Historical Research on Intercivilizational Relations, described as the first institutionalized joint research

platform in the humanities and social sciences established by a Chinese university in Croatia.<sup>190</sup> Political dialogue remained active too: on May 21, the Croatia–China Interparliamentary Friendship Group met in Zagreb with Chinese Ambassador Qi Qianjin to discuss expanding cooperation in trade, transport, science, and new technologies.<sup>191</sup> In July, another long-standing objective of bilateral cooperation moved closer to realization when Air China announced a new regular service connecting Beijing and Zagreb via Bucharest, scheduled to commence in September 2026.<sup>192</sup>

Although cooperative and diplomatically constructive toward China, Croatia is neither among Beijing's primary partners in the EU nor an agenda-setting actor in Europe–China relations. Instead, Zagreb follows a balancing strategy in which economic engagement with China is pursued selectively and pragmatically, without challenging Croatia's overwhelmingly transatlantic and European political, security, and economic alignment. Croatia therefore belongs among the region's selective pragmatists – fostering openness to business partnerships while steadfastly maintaining its strategic alignment within Euro-Atlantic frameworks.

## MONTENEGRO: POST-DEBT PRAGMATISM UNDER EUROPEAN SUPERVISION

As of January 2025, Montenegro's relationship with China is defined by pragmatic, economy-focused cooperation. Montenegro carefully balances its economic cooperation with China alongside its ongoing commitments to EU accession. Notwithstanding recent instances of cooperation in education and technology,<sup>193</sup> Montenegro primarily regards China as an economic partner and ensures that its international relations and security strategies remain firmly anchored within the frameworks of the EU and NATO.

The Trump reelection did not significantly influence the dynamics between Montenegro and China. However, Montenegro stands out as a prime example of the changing nature of Chinese engagement in the region. Despite not severing ties with China after the controversial Bar–Boljare motorway debt episode, Montenegro has clearly shifted the terms of engagement. Namely, Chinese companies remain active in large infrastructure projects, but the political permissiveness of the earlier period has been replaced by stricter financial and political oversight.

The shift was internally driven. It started with the 2021 fall of the Milo Đukanović regime and consolidated with his loss in the 2023 presidential elections. The Đukanović reign was notable for, among other things, its close personal and economic ties with China. The Bar–Boljare motorway is a key example of this former dependency. Specifically, the Smokovac–Mateševac section – a 42-kilometer highway constructed by the China Road and Bridge Corporation – faced prolonged delays, presented significant environmental challenges to the Tara River basin<sup>194</sup> and raised global concerns about China's "debt-trap diplomacy."<sup>195</sup> In 2021, facing potential default, Montenegro sought help from the EU, which helped arrange a hedging deal with European and American banks to reduce the risk of the dollar-denominated Chinese loan.<sup>196</sup>

Montenegro's China skepticism continued deepening since, becoming particularly evident in 2026 when its government signed a €694 million contract with a consortium of Chinese companies to build the second section of the motorway. Notably,

this contract employs a more European financing structure – including support from the EBRD and EU funds – as opposed to the politically sensitive Chinese loan model used previously. This distinction is crucial: Montenegro still works with Chinese contractors, but not on the same terms as before.<sup>197</sup>

The relationship remained active in 2026, which marked the 20th anniversary of diplomatic relations. In March, China expressed its intent to apply for another infrastructure project<sup>198</sup> and the interest in “strengthening cooperation in areas such as trade, investment and infrastructure development.”<sup>199</sup> During the Summer Davos Forum in June, Prime Minister Milojko Spajić met with Chinese Premier Li Qiang, with both sides reaffirming cooperation in trade, green development, tourism, digital infrastructure, and artificial intelligence.<sup>200</sup> The meeting also saw China announce a €13 million grant package for future development projects, with the specific allocation to be determined.<sup>201</sup> Meanwhile, in late July, Montenegro announced that it would end visa-free travel for Chinese citizens from November 2026 to align its visa policy with EU requirements, underscoring the primacy of its EU accession commitments.<sup>202</sup>

Taken together, developments in 2025 and 2026 suggest that China is likely to continue pursuing commercial flexibility in Montenegro. Montenegro, meanwhile, fits the category of managed pragmatism with a debt-memory effect.

## NORTH MACEDONIA: CONSTRAINED PRAGMATISM WITH RECURRING TAIWAN FRICTION

North Macedonia pursues a deliberate strategy of aligning itself with NATO and continuing its progress toward EU integration. Simultaneously, however, and in order to leverage opportunities for growth and diversification, North Macedonia ensures that its economy remains sufficiently open to cultivate and sustain a measured partnership with China. With this approach, like most of the Western Balkan countries, North Macedonia navigates its commitment to Western security and political frameworks while preserving pragmatic economic cooperation with China.

In early 2025, trade between North Macedonia and China experienced notable expansion, with Chinese exports to North Macedonia rising by more than 39 percent as of February 2026.<sup>203</sup> This growth solidified China as a prominent trade partner for North Macedonia: its third-largest trading partner and its largest non-European partner.<sup>204</sup>

But in late 2025, North Macedonia’s pragmatic management of its Western commitments and economic partnership with China was challenged by a Taiwan incident.<sup>205</sup> The episode was particularly sensitive due to its historical roots: in 1999, North Macedonia’s recognition of Taiwan led to a lengthy rupture in its relations with China.<sup>206</sup> When North Macedonian members of parliament met with Taiwanese representatives from Italy in Skopje in November 2025, China responded firmly, but the incident did not escalate into a prolonged crisis. Instead, both sides moved quickly to contain the fallout and restore the relationship to its underlying pragmatic footing, allowing bilateral cooperation to continue without lasting disruption.

By early 2026, bilateral relations had largely returned to their established pattern of pragmatic cooperation. In March, North Macedonia used an investment promotion

event in Beijing to present itself as a prospective destination for Chinese trade and investment, while Chinese officials highlighted opportunities for closer economic engagement under the 15th Five-Year Plan in areas such as green development, infrastructure, and economic modernization.<sup>207</sup> This renewed emphasis on practical economic ties culminated in May, when Deputy Prime Minister Ivan Stoilković attended the 7th China–CEEC Local Leaders' Meeting in Jinan – the highest-level official visit by a North Macedonian representative to China in more than a decade. The visit underscored both sides' interest in expanding ties in agriculture, infrastructure, investment, technology, and trade.<sup>208</sup>

These developments point to a broader continuity: China remains relevant as a commercial actor, while the EU increasingly sees North Macedonia as vulnerable to foreign influence and disinformation, including from Russia and China.<sup>209,210</sup> This likely means that the bilateral relationship will continue largely unchanged, albeit under heightened European scrutiny. North Macedonia is thus best seen as a constrained pragmatist: strategically Western, economically open, politically careful.

## KOSOVO: POLITICALLY CLOSED TO CHINA, ECONOMICALLY EXPOSED TO IT

Kosovo and China do not have formal diplomatic relations, as Beijing has not recognized Kosovo as an independent state. It continues to frame Kosovo through the lens of Serbia's sovereignty and territorial integrity,<sup>211</sup> a position it reaffirmed during the April 2026 UNSC debate on Kosovo.<sup>212</sup> Kosovo, for its part, maintains a skeptical and critical approach toward China, viewing Beijing as an adversary. As a result, Kosovo remains outside China's political architecture in the Western Balkans.

Yet this does not mean that the China factor is irrelevant.<sup>213</sup> On the contrary, Kosovo's import dependence on Chinese goods has grown rapidly, reaching roughly €900–920 million in 2025, double the level of 2021, and accounting for around 13 percent of Kosovo's imports. The statistic makes China Kosovo's third-largest import partner.<sup>214</sup>

That is to say: Chinese influence in Kosovo is primarily indirect and economically oriented. Recent research pointed out that, although Beijing does not recognize Kosovo's independence and maintains no formal diplomatic relations with Pristina, it nevertheless sustains engagement through trade cooperation, local business networks, municipal partnerships, and cultural and artistic exchanges – advancing its presence there through soft power mechanisms and gradual relationship-building at the local level.<sup>215</sup>

While Kosovo is not subject to the same political influence from China as countries like Serbia or Bosnia and Herzegovina, a different form of vulnerability is emerging. The lack of diplomatic ties and political engagement with Beijing means Kosovo is not directly influenced by Chinese statecraft. However, it is increasingly becoming structurally exposed through a growing dependence on Chinese imports and supply chains. This economic exposure represents a narrower, yet still significant, form of non-political dependence on China.

## SERBIA: BEIJING'S ENTRENCHED STRATEGIC PARTNER IN THE WESTERN BALKANS

Serbia remains China's strongest and most entrenched partner in the Western Balkans. Unlike most neighboring states, it combines political symbolism, military cooperation, industrial presence, and a governing elite that sees value in close ties with Beijing. This is not just economic pragmatism; it is a regime-level strategic choice.

The relationship is often encapsulated in the phrase “ironclad friendship” – a designation employed in Chinese political discourse for a select group of highly valued bilateral partnerships.<sup>216</sup> And in 2025, it was strengthened through a series of high-level meetings, the implementation of a free trade agreement, and further enhancing of military cooperation.

Xi Jinping and Serbian President Aleksandar Vučić met twice in 2025.<sup>217,218</sup> In March 2025, the China–Serbia Economic and Trade Cooperation Forum was held in Belgrade, highlighting the impact of the Free Trade Agreement (FTA) the countries signed in 2024.<sup>219</sup> In September, Peng Qinghua, vice chairman of the Standing Committee of the National People's Congress, co-chaired the 5th meeting of the China–Serbia Legislative Bodies Cooperation Committee with Marina Ragus, deputy speaker of Serbia's National Assembly, in Beijing, aiming to strengthen legal support for bilateral cooperation.<sup>220</sup> In November, Li Qiang met with the Serbian prime minister in Shanghai, noting high-level trust and continued investment.<sup>221</sup> In December, the 12th session of the China–Serbia Intergovernmental Joint Commission was held in Beijing, where both sides signed multiple agreements to boost cooperation in AI, green energy, and technology.<sup>222</sup> This pattern of intensive high-level engagement continued in May 2026, when Vučić paid an official visit to China and the two sides signed more than 30 agreements covering artificial intelligence, the digital economy, trade, infrastructure, science and technology, education, healthcare, and green development, further consolidating Serbia's position as China's closest partner in the Western Balkans.<sup>223</sup>

The economic dimension of the partnership also continued to deepen. In the first year following the entry into force of the FTA, Serbia–China bilateral trade increased by 20.5 percent, reaching \$9.37 billion.<sup>224</sup> But so did the Serbian trade deficit. Serbian exports to China experienced substantial growth, albeit mostly concentrated in natural resources.<sup>225</sup> The Belgrade–Subotica high-speed railway, part of the Budapest–Belgrade corridor and one of the largest infrastructure projects associated with China–CEE cooperation, became fully operational in late 2025, with the wider cross-border railway entering service in early 2026.<sup>226</sup> Meanwhile, the Chinese state-owned company Powerchina had become the principal contractor for the key Expo 2027 Belgrade complex and its associated strategic infrastructure projects, following a series of Expo-related agreements concluded by Serbia in 2025.<sup>227,228</sup>

Moreover, and with more dramatic consequences for the region, Serbia and China deepened their military cooperation in 2025. In July, a Serbian special operations brigade conducted its first-ever joint training with a Chinese counterpart in Hebei Province, focusing on drone tactics and counterterrorism, defying objections from NATO and the EU.<sup>229</sup> In early 2026, reporting underlined that Serbia continues to procure Chinese military equipment.<sup>230</sup> As of March, it purchased and deployed ad-

vanced Chinese CM-400AKG supersonic air-to-ground missiles, integrating them into its MiG-29 fighter jets, and becoming the first European operator of the system.<sup>231</sup>

Trump's return and the war in Ukraine did not alter this trajectory in any meaningful way. Serbia still treats China as one pillar of a diversified, non-aligned, sovereignty-centered foreign policy. China, for its part, continues to reward Belgrade as its most valuable political partner in the region.

## SLOVENIA: ECONOMICALLY INTERESTED, STRATEGICALLY DISCIPLINED

Throughout 2025 and into 2026, Slovenia exhibited a pattern of selective economic engagement, adhering closely to the EU and NATO priorities. The country has demonstrated an interest in sustaining and incrementally enhancing economic dialogue with China, particularly in sectors such as logistics, green technologies, health, and manufacturing. However, there is no indication of a strategic shift away from its alignment with the European mainstream.

Since the onset of the war in Ukraine, Slovenia has firmly upheld its EU- and NATO-centric position in matters of international politics and security. However, the repercussions of the conflict on the broader EU economy have prompted Slovenia to pursue a policy of economic diversification and proactively seek to deepen its economic and trade relations with China so as to strengthen the country's economic resilience. As part of that effort, and also to align itself with German automotive interests that are extremely important to its economy, in October 2024 Slovenia voted against the EU proposal to impose definitive tariffs on Chinese electric vehicles.<sup>232,233</sup> And in March 2026, it issued yuan-denominated bonds, becoming the first CEE country in the eurozone to do so.<sup>234</sup>

Throughout 2025, Slovenia and China conducted several high-level exchanges aimed at strengthening economic cooperation. As part of his broader European tour, Wang Yi visited Ljubljana in September 2025 for meetings focused on strengthening bilateral ties and expanding economic cooperation.<sup>235</sup> In November, Marko Lotrič, president of the National Council of Slovenia, led a delegation of more than 80 representatives to China, where he met senior Chinese leaders, including Zhao Leji and Wang Huning.<sup>236</sup> Later that month, the 15th meeting of the Slovenian–Chinese Joint Commission for Economic Cooperation was held in Shanghai. The two sides highlighted opportunities to “strengthen existing and identify new business opportunities,” particularly in sectors including automotive manufacturing, agriculture, food industries, health, pharmaceuticals, clean energy, green technologies, transport, logistics, tourism, and sport.<sup>237</sup>

These developments point to active economic diplomacy, but not geopolitical repositioning. Slovenia's March 22 parliamentary elections, and the subsequent intra-governmental bargaining, are not expected to have a major or immediate impact on this established trajectory.<sup>238</sup> Indeed, engagement continued throughout 2026. In February, the Chinese Embassy and the Slovenian Chamber of Commerce co-hosted a policy briefing on China's 15th Five-Year Plan, bringing together Slovenian government and business representatives to discuss opportunities for future economic cooperation.<sup>239</sup> In May, a large delegation of Slovenian technology companies and

municipal representatives visited Chengdu to mark the 45th anniversary of friendly city relations, exploring opportunities for cooperation in advanced technologies, information solutions, energy, industrial equipment, smart cities, and business services.<sup>240</sup> Scientific cooperation also featured in June, when the Chinese ambassador to Slovenia visited the Science and Research Centre Koper and attended a roundtable on Slovenian–Chinese scientific cooperation, where discussions highlighted nearly 100 bilateral science and technology projects and the prospects for deeper industry-university-research cooperation.<sup>241</sup> Slovenia therefore belongs firmly among the managed pragmatists.

## SELECTED EASTERN PARTNERSHIP COUNTRIES

### BELARUS: STRUCTURALLY USEFUL TO CHINA, BUT STRATEGICALLY VULNERABLE

Belarus remains a unique case vis-à-vis China. It is economically valuable, politically isolated from the West, and structurally tied to Russia, which makes it both attractive and constrained from Beijing's perspective. China can use Belarus as a logistics, regulatory, and symbolic testing platform, but the model is fragile as Minsk's autonomy is limited and transit routes remain vulnerable.

Bilateral trade reportedly reached a record \$8.86 billion<sup>242</sup> in 2025, underscoring the continued deepening of economic relations. The structure of the relationship is, however, deeply asymmetric.<sup>243</sup> Since 2008, Belarus has implemented 27 China-supported projects for around \$5 billion in investment and loans, but only around \$461 million has taken the form of direct equity investment – the rest are loans that return much of their value to China through tied procurement.<sup>244</sup> This loans-for-procurement pattern is not unique to Belarus and reflects China's broader approach to financing infrastructure projects across developing economies.<sup>245</sup> What makes the Belarusian case distinctive is the limited scope for diversification given Minsk's political isolation.

A significant milestone came on January 1, 2026, when the Agreement on Trade in Services and Investment (ATSI) entered into force, opening numerous service sectors to Chinese firms and giving Beijing an additional gateway into the Eurasian Economic Union (EAEU) market. Meanwhile, the Great Stone Industrial Park expanded to 171 residents, reinforcing its role as the flagship symbol of Sino–Belarusian cooperation. The Belarusian automotive sector illustrates the depth of this industrial anchoring: the BelGee joint venture with Geely now accounts for more than half of new-car sales in Belarus,<sup>246</sup> and around 70 percent of its production is exported to Russia, turning Minsk into an assembly hub for the Russian market.<sup>247</sup> The logic behind this arrangement was that Belarusian-assembled vehicles would benefit from duty-free access to the Russian market under EAEU rules, allowing Chinese manufacturers to circumvent tariffs applicable to direct imports from China. The local car assembly was, in this respect, arguably China's most prominent non-symbolic gain in Belarus. However, according to the latest reports,<sup>248</sup> Russia is currently aiming at curbing this mechanism. The squeeze has not yet closed the channel: BelGee produced

its 200,000th vehicle in Belarus in July 2026,<sup>249</sup> with cumulative sales to the Russian market reported above 300,000 in June 2026.<sup>250</sup>

Politically, the China–Belarus relationship was underlined by several Lukashenko–Xi encounters. The first two took place in Astana<sup>251</sup> in 2024 and Beijing<sup>252</sup> in 2025. The most prominent stage came later in 2025, when Lukashenko met Xi at the SCO summit in Tianjin<sup>253</sup> under the banner of their “all-weather comprehensive strategic” partnership, and then attended the Beijing military parade alongside Putin and Kim Jong Un,<sup>254</sup> further embedding Minsk in the anti-Western axis. The most recent encounter took place in Beijing in June 2026, where Lukashenko arrived directly from talks with Putin, and Xi pledged continued Chinese support for Belarusian sovereignty and development.<sup>255</sup> Military-technical cooperation also continues, with Belarusian officials publicly floating the possibility of arming their Polonez missile systems with nuclear warheads – a claim that, even if aspirational, underscores the nature of the China–Belarus relationship, particularly given that the Polonez system was co-developed with China.<sup>256</sup>

Yet beyond political symbolism and military-technical ties, Belarus’s role as a transit and logistics platform for China remains fragile. Poland’s September 2025 border closure exposed Belarus’s vulnerability as a transit corridor and pushed China to invest more seriously in the previously mentioned Middle Corridor alternative,<sup>257</sup> including the launch of a direct Beijing–Baku rail service that bypasses Belarus and Russia.<sup>258</sup> The Beijing–Minsk freight railway,<sup>259</sup> inaugurated in May 2025, thus remains symbolically important but no longer indispensable as Beijing diversifies its overland routes to Europe. Arguably, Beijing sees Belarus primarily as an intermediary or an assembly location targeting EU and EAEU markets,<sup>260</sup> rather than as a destination for greenfield manufacturing or R&D investments aimed at the Belarusian market itself, which would in any case be constrained by the country’s limited domestic demand.

At the same time, the apparent Trump–Lukashenko rapprochement,<sup>261</sup> and the subsequent US easing on sanctions relating to Belarusian fertilizers,<sup>262</sup> introduced a new variable into Belarus’s external positioning – potentially giving Minsk a little more room to balance between Beijing and a semi-reopened Western channel, without fundamentally altering its dependence on either Russia or China.

What matters analytically is not only the volume of bilateral trade or the symbolism of industrial-park expansion, but the way Belarus functions as a testing ground for the financial instruments, sanctions-resilient supply chains, and political arrangements that Beijing could potentially deploy in other countries with strong ties to Russia – such as the Central Asian states most exposed to secondary sanctions,<sup>263</sup> or potentially Armenia, which is currently trying to diversify from Moscow.<sup>264</sup> That gives it significance beyond the bilateral relationship. China will likely continue to deepen ties selectively, while also hedging against the vulnerability of Belarus as a corridor.

## UKRAINE: ECONOMIC NECESSITY UNDER CONDITIONS OF STRATEGIC DISTRUST

Ukraine remains the region’s most contradictory China case. On the one hand, China remains economically important, especially as a supplier of goods and equip-

ment relevant to resilience under wartime conditions. On the other hand, Kyiv increasingly treats Beijing as a country that enables Russia's war effort<sup>265</sup> and therefore as a strategic problem.

This contradiction has become sharper over time. President Volodymyr Zelenskyy's rhetoric evolved from publicly thanking China<sup>266</sup> in December 2024 to accusing it of providing "direct military assistance to Moscow"<sup>267</sup> in April 2025. Kyiv then moved to sanction Chinese companies<sup>268</sup> in April 2025 – including ones allegedly involved in the production of Iskander missiles<sup>269</sup> – and followed up with sanctions targeting Chinese suppliers of Russian Shahed-type drone components.<sup>270</sup> By mid-2025, Ukrainian military intelligence assessed that Chinese electronic components accounted for up to 65 percent of the foreign parts in Russian Shahed/Geran drones, overtaking US components for the first time.<sup>271</sup> These findings have sharpened Kyiv's framing of China as an "enabler" of Russian strikes on Ukrainian civilian infrastructure. In December 2025, Zelenskyy signaled an intention<sup>272</sup> to extend sanctions to Chinese citizens working with Russia's military-industrial complex, prompting sharp pushback from Beijing. Pressure has since shifted to the broader European level with the EU adopting the 21st sanctions package in July 2026<sup>273</sup> – again tackling Chinese and Hong Kong companies for supporting Russia's war efforts – to which Beijing responded with retaliatory measures within a day.<sup>274</sup>

At the same time, Ukraine remains materially dependent on Chinese goods in important sectors. This dependence is not new: China already ranked among Ukraine's leading trading partners before the full-scale invasion,<sup>275</sup> situating Kyiv within a broader European pattern of economic interdependence with Beijing. Today, China is still Ukraine's largest single-country trading partner,<sup>276</sup> accounting for close to half of its total trade deficit in the first five months of 2026,<sup>277</sup> and Chinese goods – including EcoFlow power stations,<sup>278</sup> batteries,<sup>279</sup> and other energy and electricity sources – played a significant role in helping households endure the winter blackouts caused by Russian strikes. According to certain reports, Chinese carmakers have also made a dramatic commercial breakthrough, with BYD reaching a 26.3 percent market share of car sales in Ukraine<sup>280</sup> despite having no official dealer network, making it one of the most visible symbols of China's civilian economic presence in this country. Ukrainian drone production remains reliant on Chinese components, though diversification efforts<sup>281</sup> have begun to reduce that reliance – albeit without eliminating it completely – as domestic manufacturing scales up.<sup>282</sup> Agriculture has emerged as another anchor: in 2025, China opened its market to selected Ukrainian products, including wheat flour, and advanced sanitary and phytosanitary alignment for part of the grain trade<sup>283</sup> – a modest but institutionalized opening that brings Ukraine foreign-currency revenue and partial diversification amid pressure from European farmers. Kyiv therefore cannot disengage from China without further compounding the strain on its wartime economy.

The broader geopolitical backdrop has also narrowed Ukraine's options. In July 2025, Chinese Foreign Minister Wang Yi reportedly told the EU High Representative Kaja Kallas that Beijing "did not want to see" a Russian loss in Ukraine, because that outcome would allow Washington to focus on China – a statement widely read in European capitals as a definitive end to any notion of Chinese neutrality.<sup>284</sup> Zelenskyy responded politically: in August 2025 he publicly ruled out China as a possible security

guarantor in any future peace deal, noting that Beijing “did not help us stop this war” and helped Russia by “opening the drone market.”<sup>285</sup> The earlier US–Ukraine minerals deal and reconstruction fund signed in April 2025<sup>286</sup> further positions Ukraine as part of a US-led effort to break Chinese dominance in critical-mineral supply chains, even as the realities of that ambition remain heavily constrained.

This contradiction is unlikely to disappear soon. Ukraine has neither the political basis nor the material incentive for rapprochement, but full decoupling is also unrealistic. The most plausible medium-term trajectory is selective compartmentalization: strong distrust in security-sensitive sectors combined with conditional openness in less sensitive economic areas, especially if post-war reconstruction creates strong demand for external capital and industrial inputs. With no substantive political dialogue, economic interaction is now one of the few remaining bilateral channels – for Kyiv, a means of retaining some leverage over Beijing’s posture toward the war; for Beijing, a way of sustaining its “balanced” image in Western capitals and a stake in possible post-war reconstruction.

# Conclusion

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By July 2026, the countries covered by this audit can no longer be meaningfully placed along a simple – and often moralizing – spectrum from “pro-China” to “anti-China.” A more useful distinction concerns the political logic through which governments manage their relations with Beijing: whether China is treated primarily as a security challenge, a bounded economic opportunity, a politically useful partner, or a relationship sustained largely by structural constraints. Hungary, following the end of Viktor Orbán’s 16 years in power, represents a separate transition case in which the political logic of the relationship is changing while much of its economic infrastructure remains firmly in place.

The first group consists of security-first skeptics: Czechia, Estonia, Lithuania, Poland, and Romania. In these countries, China is viewed through the lenses of the war in Ukraine, its alignment with Russia, economic coercion, cyber and critical-infrastructure vulnerabilities, subsea cable security, and tensions surrounding Taiwan. Economic engagement has not disappeared, but it no longer determines the political tone of the relationship. Instead, China policy has become subordinate to a broader security outlook in which Russia remains the primary threat and Beijing is understood as part of the wider strategic challenge.

Important differences nevertheless remain within this group. Poland is the most consequential case because of its regional weight, economic exposure, and importance for European security and transport links. Estonia has moved furthest toward an openly confrontational framing of China as a security threat. Lithuania remains more institutionally divided: rhetorical efforts to stabilize the relationship have not yet produced substantive normalization or reversed the consequences of the Taiwan dispute. Czechia belongs in this group despite intermittent discussion of a tactical reset, as Prague has largely concluded that China offers limited economic gains while visible political accommodation carries substantial international and reputational costs. Romania combines security-first continuity rooted in a firmly Euro-Atlantic orientation with selective economic engagement and a limited normalization of its unofficial relations with Taiwan.

A second and larger group can be described as managed pragmatists operating within a Western framework. It includes Latvia, Croatia, Slovenia, Bulgaria, Albania, North Macedonia, Montenegro, and Bosnia and Herzegovina. These countries preserve working relations with China where doing so is commercially, diplomatically, or symbolically useful. In most cases, however, this engagement remains subordinate to core EU, NATO, or accession priorities rather than forming the basis of a broader strategic alignment with Beijing.

Here, too, national approaches differ. Latvia represents the quietest and most diplomatically functional version of this model. Croatia and Slovenia pursue selective economic engagement without accompanying it with a broader strategic opening. Bulgaria remained a predominantly transactional case through 2025, although the

party-political channel maintained by the Bulgarian Socialist Party made the relationship less politically neutral than the government's economic messaging suggested. Following Rumen Radev's return to executive power in 2026, Bulgaria began to move toward the boundary between managed pragmatism and political opening, although this shift had not yet produced major substantive agreements by July 2026. Albania and North Macedonia retain strongly pro-Western orientations, with China tolerated mainly as a potential economic partner. Montenegro also belongs in this group, although its approach is now filtered through the experience of debt distress associated with the Bar–Boljare highway and stronger European involvement in the financing of subsequent infrastructure.

Bosnia and Herzegovina represents the least coherent and most institutionally constrained variant of this pattern. Its formal EU trajectory limits the scope for a state-level strategic alignment with Beijing, but fragmented governance allows entity-level authorities and political elites to pursue Chinese financing and partnerships according to their own interests. China has adapted to this environment by cultivating relationships across both entities, while developing particularly strong political ties in Republika Srpska. Bosnia and Herzegovina's engagement with China is therefore not primarily sustained by a lack of external alternatives, as in the case of structurally constrained actors (below), but enabled by weak coordination, fragmented authority, and governance practices that allow Chinese projects to bypass or compete with the accession standards promoted by the EU.

Hungary now stands apart as a transition case. Under Orbán, it was Beijing's valuable political partner within the EU. China enjoyed unusually strong access to the Hungarian leadership, while cooperation with Beijing acquired regime-level significance as part of Orbán's pursuit of sovereignty, foreign-policy diversification, and leverage against Brussels. Hungary simultaneously developed a substantial portfolio of Chinese investments, particularly in the automotive, battery, and transport sectors.

The new Péter Magyar government has placed relations with the EU, institutional reform, and domestic accountability above the cultivation of a privileged political relationship with Beijing. Its early approach nevertheless points to selective recalibration rather than a wholesale anti-China turn. Major Chinese investors, including BYD and CATL, continue to be treated as potentially valuable economic partners, while agreements inherited from the Orbán government face stronger scrutiny over transparency, subsidies, environmental standards, local economic benefits, and possible conflicts of interest. The investigation of the BYD agreements and criticism of the Budapest–Belgrade railway illustrate this project-specific approach.

Hungary should therefore not be reassigned to the security-first cluster. Nor does it continue to belong alongside Serbia and Slovakia as a privileged political partner of Beijing. China is losing its former position in Hungary's foreign-policy hierarchy, but the economic foundations of the relationship remain deeply embedded in industrial policy, local employment expectations, and existing financial commitments. The most likely trajectory is one of reprioritization: less political advocacy on Beijing's behalf, closer attention to compatibility with EU rules and domestic accountability, and continued acceptance of Chinese investment where it is considered to serve Hungarian interests.

The fourth group consists of political openers and privileged partners: Serbia and Slovakia. In these cases, China remains valuable not only as a source of trade and investment but also as a political partner. Governing elites view Beijing as providing room for maneuver, opportunities for diversification, and additional leverage in their relations with Brussels and other Western actors.

Serbia is the most deeply entrenched example. China is embedded in industrial cooperation, infrastructure, military ties, elite rhetoric, and the government's broader multi-vector foreign policy.

Slovakia represents a different but related model. It remains institutionally anchored in the EU and NATO, but Robert Fico's government has shown a willingness to court China politically and present Slovakia as a more accommodating interlocutor. Following Orbán's electoral defeat in April 2026, Slovakia has therefore become one of the clearest cases within the EU of a government attaching explicit political value to closer relations with Beijing.

The grouping of Serbia and Slovakia does not imply that their foreign policies or levels of dependence on China are identical. What they share is the use of the China relationship as a political resource, rather than its treatment as a narrowly bounded economic file.

A fifth category comprises structurally constrained actors: Belarus, Ukraine, and – in a narrower and primarily economic sense – Kosovo. Their relations with China are shaped less by an affirmative strategic choice than by the environments in which they operate.

Belarus seeks to use China as a hedge against sanctions and as a partial counterweight within a relationship still overwhelmingly dominated by Russia. The room for such diversification is limited, but the political and economic constraints facing Minsk make even partial Chinese engagement valuable.

Ukraine's position is different but equally constrained. Strategic distrust of Beijing has grown sharply as a consequence of China's support for Russia, yet Ukraine cannot readily decouple from the Chinese economy or eliminate its exposure to Chinese trade, technology, and supply chains.

Kosovo, despite the absence of formal diplomatic relations with Beijing, illustrates another version of structural exposure: economic dependence on Chinese products and supply chains can expand even without a corresponding political relationship. None of these countries can be meaningfully described as a political opener toward China. Their ties persist because war, sanctions, non-recognition, economic exposure, or a lack of viable alternatives sharply restrict the available choices.

Taken together, these clusters show that the principal divide in CEE, SEE and selected Eastern Partnership countries is not between those that “like” or “dislike” China. It is between governments that increasingly incorporate China into their security threat assessments, those that confine the relationship to limited and conditional economic engagement, those that continue to regard Beijing as a politically useful partner, and those whose ties to China endure largely because structural conditions leave them few alternatives. Hungary demonstrates that countries can also move between these categories without immediately abandoning the economic legacies of their previous policies.

**TABLE 2: CLUSTERS OF ANALYZED CEE, SEE AND SELECTED EASTERN PARTNERSHIP COUNTRIES BY THEIR APPROACHES TO CHINA**

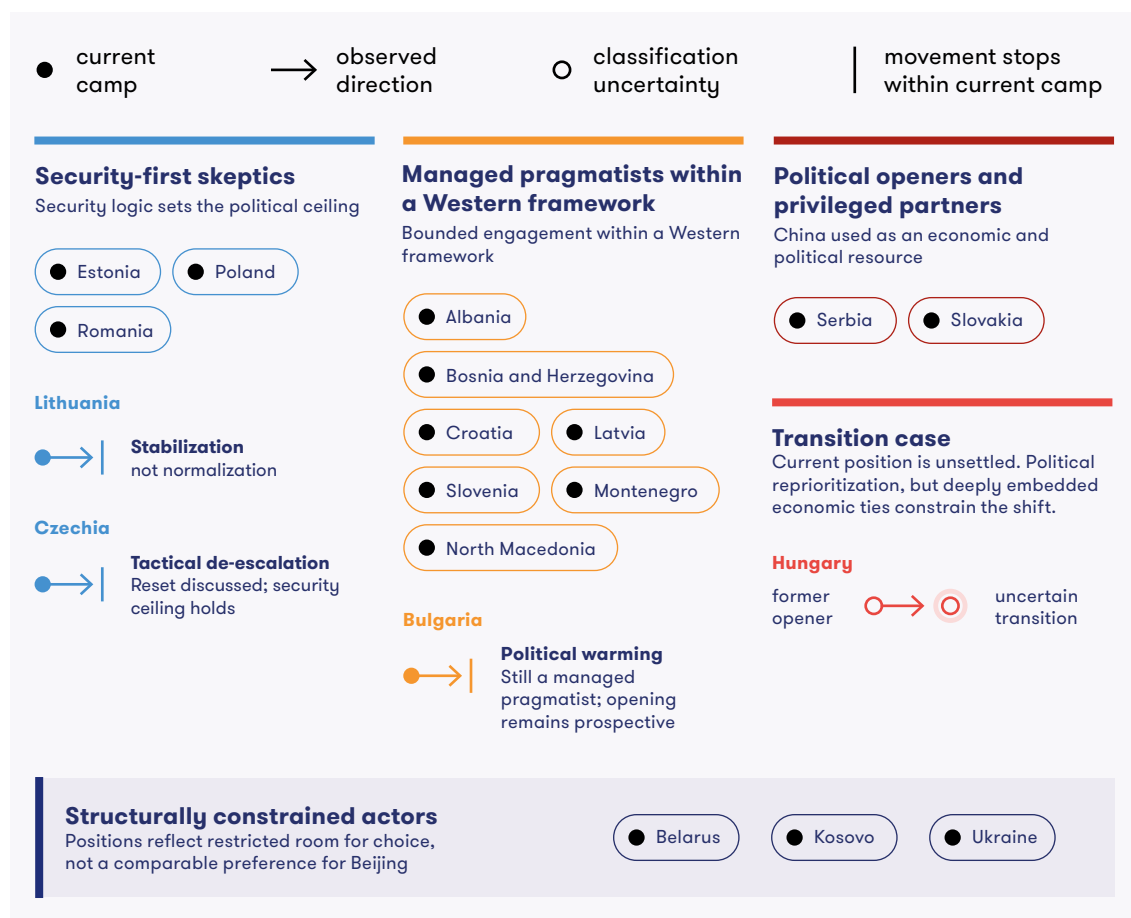
| Cluster                                        | Countries                                                                                         | Core logic                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Security-first skeptics                        | Czechia, Estonia, Lithuania, Poland, Romania                                                      | China is understood through the war in Ukraine, relations with Russia, cyber and infrastructure vulnerabilities, coercion risks, and tensions surrounding Taiwan.                                                                                                                                                                                                                        |
| Managed pragmatists within a Western framework | Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Latvia, Montenegro, North Macedonia, Slovenia | Governments preserve limited economic and diplomatic engagement but keep it subordinate to their EU, NATO, or accession priorities. Bulgaria remained within this group as of July 2026, although the Radev government's early outreach to Beijing indicated possible movement toward political opening. In Bosnia and Herzegovina, this logic is complicated by internal fragmentation. |
| Transition case                                | Hungary                                                                                           | China's economic foothold remains substantial, but the political logic and relative priority of the relationship are changing after Orbán.                                                                                                                                                                                                                                               |
| Political openers and privileged partners      | Serbia, Slovakia                                                                                  | Governing elites treat China as a politically useful source of investment, diversification, and room for maneuver vis-à-vis Brussels and other Western partners.                                                                                                                                                                                                                         |
| Structurally constrained actors                | Belarus, Kosovo, Ukraine                                                                          | Relations with China persist less because of political preference than because of war, sanctions, non-recognition, economic exposure, or limited alternatives.                                                                                                                                                                                                                           |

This framework captures regional variation more accurately than a conventional hawk–dove distinction. These categories nevertheless describe dominant trajectories rather than fixed alignments: Hungary demonstrates how domestic political turnover can weaken an established political partnership, while Bulgaria shows how a previously transactional relationship can begin to acquire a more explicitly political dimension.

It also helps explain the selectivity of China's own response. Beijing is seeking to preserve entrenched positions where economic interests remain substantial, deepen relations with governments that still attach political value to the partnership, maintain functional channels with cautious pragmatists, and contain losses where China has

## SCHEME 1: CEE-CHINA POLICY LANDSCAPE (19 COUNTRIES)

CURRENT CAMPS AND EMERGING TRANSITIONS, JANUARY 2025 - JULY 2026



Qualitative comparison; distance is not a numerical score.

become primarily associated with Russia, coercion, cyber threats, or infrastructure vulnerabilities. The result is neither a regional turn toward China nor a uniform process of disengagement. It is an increasingly differentiated landscape in which shared geopolitical pressures are producing markedly different national responses – and in which the political importance of China is, in many cases, changing faster than the economic relationship itself.

# About the Authors

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# About CHOICE

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The publication was prepared within the China Observers in Central and Eastern Europe (CHOICE) collaborative platform. CHOICE is a think net of China experts providing informed analysis on the rising influence of the People's Republic of China within the countries of Central and Eastern Europe and beyond. It is the largest network of China experts in the Central and Eastern European region, with more than 240 contributors from 30 different countries.

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# Footnotes

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