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Empowering the Geopolitical EU

in the Eastern Neighbourhood and the Western Balkans

DELIVERABLE

3.5

Strategic Foresight

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Table of contents

About GEO-POWER-EU 6
Partner beneficiaries 7
How to use this report 8
Executive Summary 9
Eight futures for the region 10
Glossary 16
Approach to Strategic Foresight and Methodology 18
What the macroscenarios are, and what they are not 18
Analytical framework 19
Interdependent drivers 23
Strengths and limitations 26
Structure of the report 28
The Strategic Context in 2026 29
Scheduled inflection points, 2026-2031 31
Potential shocks or discontinuities, 2026-2031 32
Macroscenario Framework 34
MACROSCENARIO 1 | Procedural Enlargement 39
MACROSCENARIO 2 | Managed Geopolitical Diversification 49
MACROSCENARIO 3 | Differentiated Enlargement 59
MACROSCENARIO 4 | Transatlantic Renewal 68
MACROSCENARIO 5 | European Strategic Leadership 78
MACROSCENARIO 6 | Alternative Order 87
MACROSCENARIO 7 | Competitive Disorder 97
MACROSCENARIO 8 | Regional Vacuum 108
CONCLUSION | Cross-Scenario Findings 118
ANNEX A: The Sample for the Structured Expert Elicitation Survey 124
ANNEX B: External Actor Postures 137
ANNEX C: Summarised Country Profiles 141
References 155

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BACKGROUND

About GEO-POWER-EU

GEO-POWER-EU aims to empower the EU to manage security threats in its Eastern Partnership and the Western Balkans amidst a deteriorating geopolitical environment. The project's primary ambition is to surpass current standards and develop a comprehensive EU strategy for these regions, utilising new and reformed policy instruments while considering the strategic ambitions of other geopolitical actors.

To achieve this, GEO-POWER-EU's work plan is built on six specific objectives: proposing adaptations to the EU Enlargement policy to reflect new realities; examining the relevance of the Eastern Partnership and providing policy recommendations for its reform; assessing the influence of other geopolitical actors, including the USA, Russia, China, and Türkiye, in these regions; offering strategic foresight on the prospects of geopolitical competition in these areas; exploring ways to enhance the EU's ability to contain military threats from beyond its borders; and proposing a comprehensive, multidimensional EU strategy to guide relations with Western Balkan and Eastern Partnership countries.

The project's research aims to advance beyond the current state of the art by developing a new conceptual and policy framework using both quantitative and qualitative methods. Methodologically, GEO-POWER-EU leverages cutting-edge expertise from various disciplines, implementing a multi-stage plan grounded in a participatory and inclusive approach. This approach involves systematic engagement of researchers from third institutions, decision-makers, stakeholders, and citizens—including those from the regions under analysis—throughout the project cycle.

More about the project: **geo-power.eu**

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CONSORTIUM

Partner beneficiaries

01 European Neighbourhood Council (ENC), Belgium

02 University of the Peloponnese (UoP), Greece

03 Kentro Erevnon Notioanatolikis Evropis Astiki Mi Kerdoskopiki Etaireia (SEERC), Greece

04 Alma Mater Studiorum - Universita Di Bologna (UNIBO), Italy

05 Wiener Institut Fur Internationale Wirtschaftsvergleiche (WIIW), Austria

06 Sveuciliste U Rijeci (UNIRI), Croatia

07 Institut Za Demokratija Societas Civilis Skopje (IDSCS), Republic of North Macedonia

08 Univerzitet U Beogradu – Fakultet Političkih Nauka (FPN), Serbia

09 Vienneast Consulting Gmbh (VE Insight), Austria

10 Democratization Policy Council (DPC), Germany

11 Institutul Pentru Dezvoltare Si Initiative Sociale Viitorul (IDIS VIITORUL), Moldova

12 Odeskiy Nacionalniy Universitet Imeni I.I. Mechnikova (ONU), Ukraine

13 Gruusia Strateegiliste Ja Rahvusvahliste Uuringte Sihtasutus-EEST (GFSIS Estonia), Estonia

14 Utrikespolitiska Institutet Informationsavd (UII), Sweden

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How to use this report

- **For the overall argument:** read the Executive Summary and Conclusion: Cross-Scenario Findings.
- **For alternative futures:** use the Macroscenario Framework to compare the eight macroscenarios, then consult those of greatest interest.
- **For a specific candidate state:** use Figure 5 to identify how that state is positioned across the eight macroscenarios, then consult the relevant macroscenarios; and refer to the country profiles in Annex C.
- **For early warning:** use the divergence trees and inflection points within each macroscenario to identify developments that could alter its trajectory.
- **For methodological detail:** see *Approach to Strategic Foresight and Methodology* and Annex A.

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Executive Summary

This report examines how the regional order in the EU candidate-state neighbourhood could develop by 2031. A structured expert elicitation brought together 45 specialists, mostly from universities and think tanks, covering the six Western Balkan candidates, Georgia, Moldova and Ukraine. Participants selected alternative postures for the EU, the USA, Russia, China and Türkiye and used them to construct baseline, preferred, nightmare and wild-card scenarios. The 175 valid human responses were compared with 180 responses generated by 45 synthetic expert personas and clustered into eight macroscenarios. These describe plausible regional orders rather than forecasts. “Preferred” and “nightmare” reflect respondents’ views, not those of the EU or the authors.

Four findings:

1. **The EU can remain structurally predominant while losing political leverage.** Trade, funding, regulatory alignment and infrastructure can remain strongly EU-centred even as their political effects weaken. The EU can therefore retain its economic, regulatory and institutional position while becoming less able to influence candidate-state governments or domestic reform.
2. **European integration does not reliably produce domestic reform.** Market access, funding, infrastructure and regulatory alignment can deepen without equivalent political convergence. Technical compliance can substitute for institutional reform, while cooperation on migration, energy and security can make consistent conditionality harder to sustain against useful incumbents. Where the benefits of integration become detached from credible accession, association without transformation can become a durable equilibrium.
3. **Candidate states help shape the regional order.** Serbia has cultivated an unusually wide set of partners, combining deep economic integration with the EU with substantial relationships involving China, Türkiye, the USA and Russia. Ukraine exercises influence differently: its military resilience, strategic choices and integration with European defence and industry affect the calculations of the EU, the USA and Russia. Other candidates have less room for manoeuvre where conflict, occupation, constitutional constraints or external dependence restrict their choices, but they are not simply passive recipients of external influence.

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4. **External influence is not zero-sum.** A loss of EU political leverage does not necessarily produce an equivalent gain for another actor. China, Russia, Türkiye and the USA can acquire greater leverage in particular countries or sectors without reproducing the breadth of the EU's economic, regulatory and institutional position. Several external actors can therefore gain influence simultaneously, sometimes in competition and sometimes in different countries or sectors.

Eight futures for the region

The eight macroscenarios fall into three groups according to the scenario types from which they predominantly emerged (Figure 1):

Baseline macroscenarios continue present trends:

- **MS1 Procedural Enlargement.** Funding, market access and infrastructure draw the candidate states into deeper integration with the EU, while accession advances slowly and unevenly. Montenegro joins around 2029–30, but elsewhere technical integration can continue without equivalent progress towards membership or domestic reform.
- **MS2 Managed Geopolitical Diversification.** Governments retain deep economic integration with the EU while maintaining relationships with other external actors in areas such as finance, infrastructure and security. These relationships remain compatible enough for candidate states to sustain them simultaneously. The EU remains the economic centre while its political leverage weakens.
- **MS3 Differentiated Enlargement.** Frontrunners join on merit while others integrate sector by sector, strengthening the link between reform and reward. The gap between leaders and laggards widens, but enlargement proceeds despite those differences.

Preferred macroscenarios consolidate an EU-centred order on different security foundations:

- **MS4 Transatlantic Renewal.** The USA re-engages strategically with a stronger EU, combining security guarantees with enlargement and deeper political alignment. Experts generally regarded such a renewal as a distant prospect.
- **MS5 European Strategic Leadership.** The USA steps back and Europe assumes greater responsibility for defence, military mobility, energy and critical resources. Greater European capacity reduces the scope for geopolitical hedging, although a more geopolitical EU can also become more transactional about domestic reform.

Adverse macroscenarios differ in what replaces a weakened EU-centred order:

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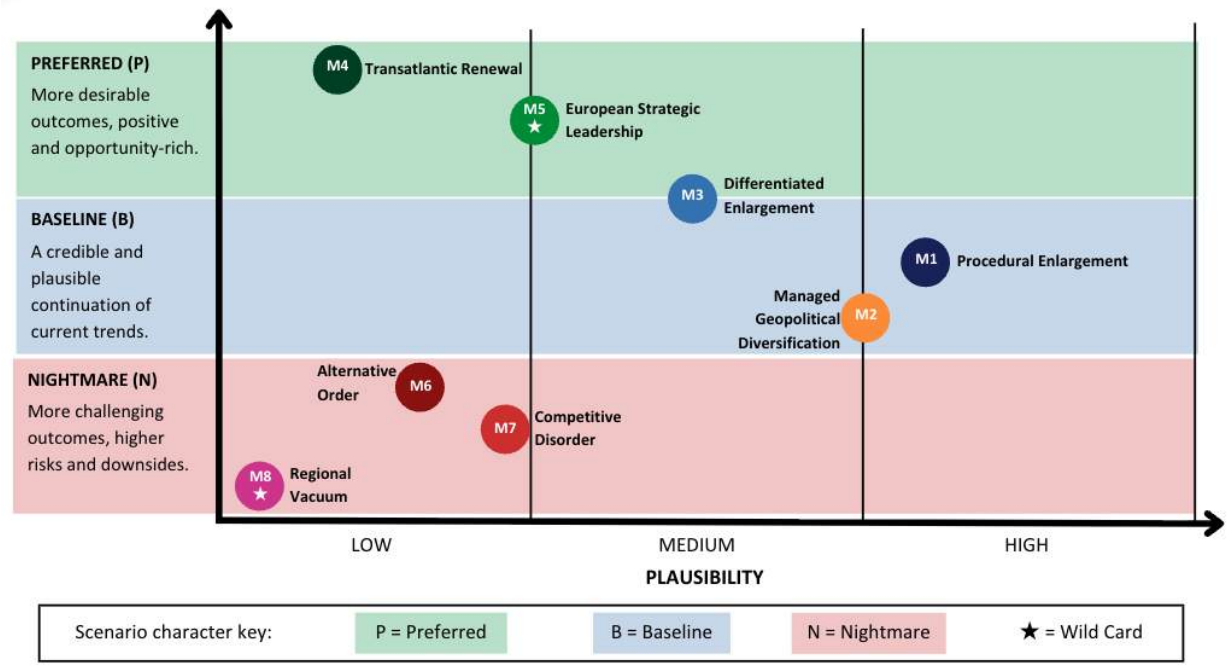
- **MS6 Alternative Order.** As EU and US leverage weakens, other external actors acquire greater capacity to constrain candidate-state choices. Rather than a single alternative hierarchy, the more plausible form is a patchwork in which different actors predominate in particular countries or sectors.
- **MS7 Competitive Disorder.** All major external actors remain engaged but pursue increasingly incompatible goals, while the USA can systematically work against EU interests. Candidate states initially retain opportunities to manoeuvre between competing relationships, but hedging becomes harder to sustain as the demands attached to them conflict.
- **MS8 Regional Vacuum.** External actors become selectively engaged as crises elsewhere absorb their attention and resources, without any of them assuming wider responsibility for regional stability. External engagement becomes uneven and conflicts are managed inconsistently or not at all.

The adverse macroscenarios share one consequence. Conflicts become harder to contain, common rules lose force, and candidate states become more exposed to coercion and bilateral bargaining.

Figure 1: Macroscenario Plausibility and Scenario Type



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What decides which future arrives

Four variables distinguish the macroscenarios:

1. the EU's internal cohesion and the credibility of its enlargement offer;
2. the character of US engagement;
3. the course of the war in Ukraine and Russia's residual capacity; and
4. the political trajectories of the candidate states.

Three interactions are particularly important:

- **The consequences of US retrenchment depend on European capacity.** Where the EU can assume the security functions left behind, US retrenchment can contribute to European Strategic Leadership (MS5). Where it cannot, the same development can create openings for Alternative Order or Regional Vacuum (MS6, MS8).
- **The effects of declining Russian capacity depend on the surrounding security order.** Where European or transatlantic security arrangements remain strong, declining Russian capacity can reduce Moscow's regional leverage. Where they are weak, it can generate new instability as actors dependent on Russian support adjust to its decline.
- **Candidate-state hedging depends on the compatibility of external relationships.** Governments can maintain relationships with competing external actors while the demands attached to them remain compatible. As those demands increasingly conflict, hedging becomes harder to sustain.

Table 1: Principal uncertainties across macroscenarios

	EU cohesion and credibility	US engagement	Ukraine war and Russia	Candidate-country politics	Resulting order
MS1 Procedural Enlargement	Divided; accession becomes procedure	Distracted; selective security role	Constrained but still threatening	Compliance without reform	EU-centred but shallow
MS2 Managed Geopolitical Diversification	Technocratic; membership indefinite	Retrenching and bilateral	Ceasefire; Russia reconstitutes	Hedging among compatible partners	EU economic centre, diffuse politics

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	EU cohesion and credibility	US engagement	Ukraine war and Russia	Candidate-country politics	Resulting order
MS3 Differentiated Enlargement	Credible, differentiated path	Retrenching; Europe partly substitutes	Constrained	Frontrunners reform; laggards hedge	Stratified EU-centred order
MS4 Transatlantic Renewal	Proactive; accession momentum	Renewed partnership	Weakened, still disruptive	Room narrows; reform incomplete	Consolidated Euro-Atlantic order
MS5 European Strategic Leadership	Strategic leadership; enlargement a priority	Withdraws; Europe replaces	Weakened	Alignment ahead of reform	European-led order
MS6 Alternative Order	Declining stakeholder	Chaotic withdrawal	Consolidated; converts gains into leverage	Constrained by new patrons	Patchwork of external hierarchies
MS7 Competitive Disorder	Divided; credibility uncertain	Transactional; works against the EU	Armistice without credible guarantee	Hedging becomes incompatible	Contested arena, no predominance
MS8 Regional Vacuum	Declining	Chaotic withdrawal	Overstretched, like other powers	Fewer constraints; state capture	No ordering framework

Two uncertainties that the EU can influence:

1. **Enlargement credibility**

EU cohesion and enlargement credibility arise substantially from political choices within the EU and its member states, even if elections, national interests and bilateral disputes make both unstable. The macroscenarios distinguish enlargement credibility from the volume of funding or the extent of sectoral integration. Its central test is whether candidates that meet accession requirements are seen to advance towards membership. Where technically prepared candidates remain blocked, intermediate integration can become a durable condition in which

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the benefits of association are increasingly detached from the political costs of reform. As one Moldovan researcher put it, enlargement may reach a point at which it *"either becomes politically credible and time-bound or begins to look permanently postponed."*

Several developments before 2031 will test this credibility. Negotiations over the 2028–34 EU budget will determine the resources available for enlargement, infrastructure and integration. Montenegro's expected accession around 2029–30 will test whether the admission of a frontrunner is followed by further movement among technically advanced candidates. Member-state politics and bilateral disputes will continue to affect whether progress against formal accession criteria translates into political decisions on membership. As accession becomes more credible, domestic resistance can also intensify among actors whose interests are threatened by reform.

2. European security capacity

The security environment surrounding enlargement depends partly on whether European states can assume functions previously provided or underwritten by the USA. As one civil-society expert put it, *"the security backstop that made EU conditionality credible is disappearing."* US retrenchment is therefore less consequential where European capabilities are already in place before significant gaps emerge.

This does not require Europe to replace the full range of American capabilities. Even with greater European responsibility for conventional deterrence, the USA may remain difficult to replace in areas such as nuclear deterrence, intelligence and strategic lift. In the candidate-state neighbourhood, European capacity has more specific dimensions: air defence and conventional deterrence; military mobility along corridors such as Corridor VIII; integration of Ukraine's production capacity and battlefield experience into the European defence industry; continued commitment to EUFOR Althea and KFOR; and protection of energy and critical infrastructure.

These capabilities also affect the political environment surrounding enlargement. EU integration is harder to sustain as a source of political leverage where the security order underpinning it becomes uncertain. Deeper cooperation in defence and military mobility can, conversely, strengthen the EU's position before membership.

What the experts expect, hope for and fear

Thirty of the 45 human baseline responses clustered under Procedural Enlargement or Managed Geopolitical Diversification. The most common expectation was therefore not the

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displacement of the EU, but continued EU economic and regulatory predominance alongside uneven accession, domestic reform and political alignment.

Preferred responses were concentrated elsewhere. Twenty-three clustered under Transatlantic Renewal, while only one baseline response fell into the same cluster. European Strategic Leadership accounted for a further twelve preferred responses, reflecting two different security foundations for a more consolidated EU-centred order.

The adverse macroscenarios were concentrated among nightmare and wild-card responses. No human baseline response clustered under Alternative Order, while 23 nightmare and 18 wild-card responses did so. Competitive Disorder was less remote from the baseline: seven baseline responses already fell into this cluster, alongside 16 nightmare and ten wild-card responses. Regional Vacuum was less prevalent overall, but appeared across baseline, nightmare and wild-card responses.

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Glossary

Term	Definition
External-actor configuration	A combination of external-actor postures used to represent a possible geopolitical setting for the candidate neighbourhood.
Candidate-state agency	The capacity of EU candidate states and their domestic actors to shape, exploit or resist external pressures and relationships.
External actor	One of the five geopolitical actors examined in the study: the EU, USA, China, Russia and Türkiye.
External-actor posture	A defined representation of how one an external actor might position itself and exercise influence in the candidate neighbourhood. See the Annex 2 with possible External Actors' Postures.
Hedging	The pursuit of relationships with multiple external actors to preserve room for manoeuvre and avoid exclusive dependence or alignment.
Inflection point	An event, decision or development capable of materially changing a scenario pathway or regional trajectory.
Macroscenario	A developed account of a distinct regional order and a plausible pathway through which it could emerge by 2031.
Macroscenario family	One of eight recurring patterns identified by classifying and clustering the individual scenarios generated through the elicitation.
Pathway	The sequence of developments, decisions and interactions through which a macroscenario could emerge.
Plausibility	The extent to which a scenario represents a credible possible future given its underlying conditions and causal relationships. It is not an estimate of probability.

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Regional order	The pattern of relationships among external actors and candidate states determines how influence, constraints and opportunities are distributed across the neighbourhood.
Scenario	An individual account of a possible regional future generated through the structured expert elicitation.
Scenario type	The perspective under which a scenario was elicited: **Baseline** (most plausible), **Preferred** (most desirable), **Nightmare** (most undesirable), or **Wild Card** (a disruptive or unexpected development).
Strategic foresight	The systematic exploration of alternative plausible futures to understand uncertainty, possible change and its implications for present-day decisions.
Structured expert elicitation	A method for systematically eliciting and comparing individual expert judgements on developments characterised by uncertainty.
Synthetic expert persona	An analytically constructed expert profile used to generate a parallel response for comparison with, and stress-testing of, human expert findings.
Trajectory	The direction and pattern of change in an actor's posture, a candidate state's position or the wider regional order over time.

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Approach to Strategic Foresight and Methodology

The regional order surrounding the EU candidate states is shaped by the interaction between the EU, the USA, Russia, China and Türkiye and by the choices of the candidate states themselves. Over the period to 2031, changes in these relationships could produce substantially different forms of regional order. Strategic foresight provides a structured way of examining such uncertainties by identifying plausible alternative futures, making their underlying assumptions explicit, and considering the developments through which different trajectories could emerge (European Commission, 2020; OECD, 2019).

This chapter sets out the analytical framework behind the eight macroscenarios, the process through which they were developed, and the limits of the exercise. Procedural detail, including the audit trail for the clustering stage and the protocol used to generate the synthetic expert personas, is provided in Annex A.

What the macroscenarios are, and what they are not

Each macroscenario sets out a conditional causal pathway. A particular combination of external-actor behaviour, candidate-state choices and security developments can make a particular form of regional order more plausible by 2031. The analysis covers five external actors – the EU, the USA, Russia, China and Türkiye – and nine candidate states: the six Western Balkan candidates, Georgia, Moldova and Ukraine.

The five-year horizon is shorter than that of some comparable foresight exercises; other Horizon Europe projects, including RE-ENGAGE and REUNIR, extend to 2035. The choice reflects the purpose of the exercise. The period to 2031 encompasses several political and institutional cycles that could alter the regional order, including elections in the USA, EU member states and candidate states; negotiation of the 2028–34 Multiannual Financial Framework; and a period in which further EU accessions could plausibly occur. A longer horizon would capture more structural change, but would also increase uncertainty about the pathways leading to it.

The macroscenarios are not forecasts, and the report assigns no probabilities. Because response counts and plausibility ratings are presented alongside them, three distinctions are important:

- **Prevalence is not probability.** The number of responses within a macroscenario family indicates how often a particular form of regional order appeared in the exercise. The

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distribution is also conditional on the design: respondents worked with predefined external-actor postures and four prescribed scenario types, and a different framework could have produced a different distribution.

- **Plausibility is not a calibrated forecast.** Respondents assigned their scenarios to plausibility bands. These assessments were not elicited or calibrated as probabilities and should not be read as such.
- **Scenario type is a perspective, not a verdict.** “Baseline”, “preferred”, “nightmare” and “wild card” describe the perspective under which a scenario was elicited. They do not represent the authors’ or the EU’s assessment of what is likely or desirable.

The chronological sequencing within each pathway is approximate. An event placed in 2028 could occur a year earlier or later without altering the logic of the macroscenario; the sequence of developments and the relationships between them are more important than their precise timing. This also allows the pathways to identify developments that should become observable before a particular regional order is established.

Analytical framework

The analysis rests on two propositions about the regional order. A set of core concepts then defines how the expert elicitation was structured and how the resulting scenarios were analysed.

Two propositions about the regional order:

1. **Regional order is contingent and influence is not zero-sum.** Regional order refers to the pattern of relationships through which influence, constraints and opportunities are distributed across the candidate-state neighbourhood. Several external actors can exercise influence simultaneously, often in different countries or sectors. A loss of influence by one actor therefore need not translate into an equivalent gain for another.
2. **Candidate states exercise constrained agency.** Governments, parties and institutions can align, resist, hedge between partners or exploit competition, and in doing so alter the calculations of external actors. Their room for manoeuvre is nevertheless constrained by geography, conflict, dependence and domestic politics. Similar changes in the regional environment can therefore produce different outcomes across candidate states.

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Core concepts

Posture: how an external actor behaves. A posture is a stylised representation of how an external actor positions itself and exercises influence in the candidate-state neighbourhood. It is defined along two dimensions:

1. **Internal alignment:** whether the actor can formulate and sustain a coherent approach (**Strategic Alignment**) or is constrained by political, institutional or fiscal divisions (**Fragmented Alignment**).
2. **Breadth of engagement:** whether the actor seeks to shape the regional order more broadly (**Regional Order-Setting**) or engages selectively where narrower interests are at stake (**Selective Engagement**).

Combining the two dimensions produces four posture combinations:

1. **Strategic Alignment × Regional Order-Setting:** strong internal cohesion supports sustained and coordinated efforts to shape the regional order.
2. **Strategic Alignment × Selective Engagement:** internal coherence is retained, but attention and resources concentrate on narrower regional priorities.
3. **Fragmented Alignment × Regional Order-Setting:** broader regional ambitions persist despite political, institutional or fiscal constraints that weaken coordination.
4. **Fragmented Alignment × Selective Engagement:** weaker internal cohesion coincides with narrower and more reactive regional engagement.

Each combination takes a different form for the five external actors, producing twenty actor-specific postures in total. The postures are descriptive: Strategic Alignment or Regional Order-Setting is not assumed to be necessarily more desirable, effective or stabilising.

Table 2: Actor-specific interpretation of the posture dimensions.

Actor	Internal alignment means…	Regional order-setting means…	Where the analogy strains
EU	Consensus among member states and institutions, constrained by unanimity in enlargement and foreign policy	Enlargement, regulation, market access and funding	Fragmentation is constitutional and visible; influence relies on law and markets rather than coercion

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Actor	Internal alignment means…	Regional order-setting means…	Where the analogy strains
USA	Coherence between executive, Congress and agencies, and continuity across administrations	Security guarantees, NATO, sanctions and financial leverage	Alignment can shift abruptly with elections; a highly aligned administration may pursue retrenchment
China	Coordination among party-state, financial institutions and firms, under economic and fiscal constraints	Infrastructure finance, investment, technology and standards	Internal contestation is hard to observe; the region is a secondary theatre, so order-setting is rarely the aim
Russia	Elite cohesion and the fiscal and military capacity to sustain a strategy	Military power, energy leverage, political networks and hybrid activity	Capacity to disrupt can persist without capacity to order; fragmentation may surface suddenly
Türkiye	Consistent presidential direction backed by economic and fiscal capacity	Defence cooperation, connectivity, trade, brokerage and cultural networks	Personalised decision-making blurs alignment and leadership preference; ambitions differ by subregion

Where a posture fits an actor imperfectly, the macroscenario narratives describe that actor's behaviour in its own terms. The framework provides a common basis for comparison rather than implying equivalence among the five actors.

	Strategic Alignment x Regional Order-Setting	Strategic Alignment x Selective Engagement	Fragmented Alignment x Regional Order-Setting	Fragmented Alignment x Selective Engagement
EU	*Proactive Order Setter*	*Restrained Strategist*	*Technocratic Order-Setter*	*Declining Stakeholder*

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USA	*Regional Security Architect*	*Strategic Retrenchment*	*Distracted Security Leader*	*Chaotic Withdrawal*
CHINA	*Regional Order-Shaper*	*Selective Economic Engagement*	*Overextended Expansion*	*Residual Engagement*
RUSSIA	*Consolidated Expansionist*	*Strategic Retrenchment*	*Unstable Expansionist*	*Chaotic Withdrawal*
TÜRKIYE	*Principal Regional Actor*	*Calibrated Regional Power*	*Overreaching Broker*	*Regional Retreat*

Table 3: External-actor postures

Configuration: the geopolitical setting. A configuration combines one posture for each of the five external actors. The configuration most often associated with Procedural Enlargement (MS1), for example, combines a Technocratic Order-Setter EU, a Distracted Security Leader USA, Selective Economic Engagement by China, an Unstable Expansionist Russia and a Calibrated Regional Power Türkiye. A configuration is the starting point of a scenario, not its outcome. The same configuration can produce different regional orders depending on candidate-state choices and interactions among external actors, while different configurations can produce similar orders. Macroscenarios were therefore defined by the regional orders described in the responses rather than by their configurations (Step 4). Each macroscenario chapter presents a representative rather than defining configuration.

Scenario type: the perspective of the respondent. Each respondent constructed four configurations, corresponding to four scenario types:

1. a **baseline**, representing the future they considered most plausible;
2. a **preferred future**, representing the most desirable;
3. a **nightmare**, representing the most undesirable; and
4. a **wild card**, representing a disruptive or unexpected development.

The four types encourage respondents to consider alternatives to their expected future and allow expectations, preferences and concerns to be compared. Scenario type records the perspective under which a response was elicited rather than an intrinsic characteristic of the resulting regional order. A macroscenario can therefore contain responses elicited under several scenario types.

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Scenario and macroscenario: two units of analysis. A ***scenario*** is the future described by one respondent for one configuration, including the resulting regional order, its implications for the respondent's country or thematic area, and a plausibility rating. A ***macroscenario*** is an author-developed synthesis of scenarios describing a similar form of regional order. The exercise produced 355 scenario responses, which were grouped into eight macroscenarios.

Interdependent drivers

The drivers shaping the macroscenarios interact and can operate as both causes and consequences. EU cohesion affects the credibility of enlargement; credibility shapes political incentives in candidate states; reform, or its absence, can in turn affect member-state willingness to enlarge. Similarly, reduced US engagement can encourage greater European security capacity, which may subsequently affect US burden-sharing. These feedback effects can cause trajectories beginning from similar conditions to diverge over time.

Figure 2 illustrates three recurring relationships. In the **credibility loop**, credible enlargement encourages reform, which can strengthen member-state support for further enlargement. In the **leverage loop**, weak credibility encourages hedging, which can reduce EU leverage and weaken incentives for reform. In the **burden-sharing loop**, reduced US engagement and European capacity-building can reinforce one another.

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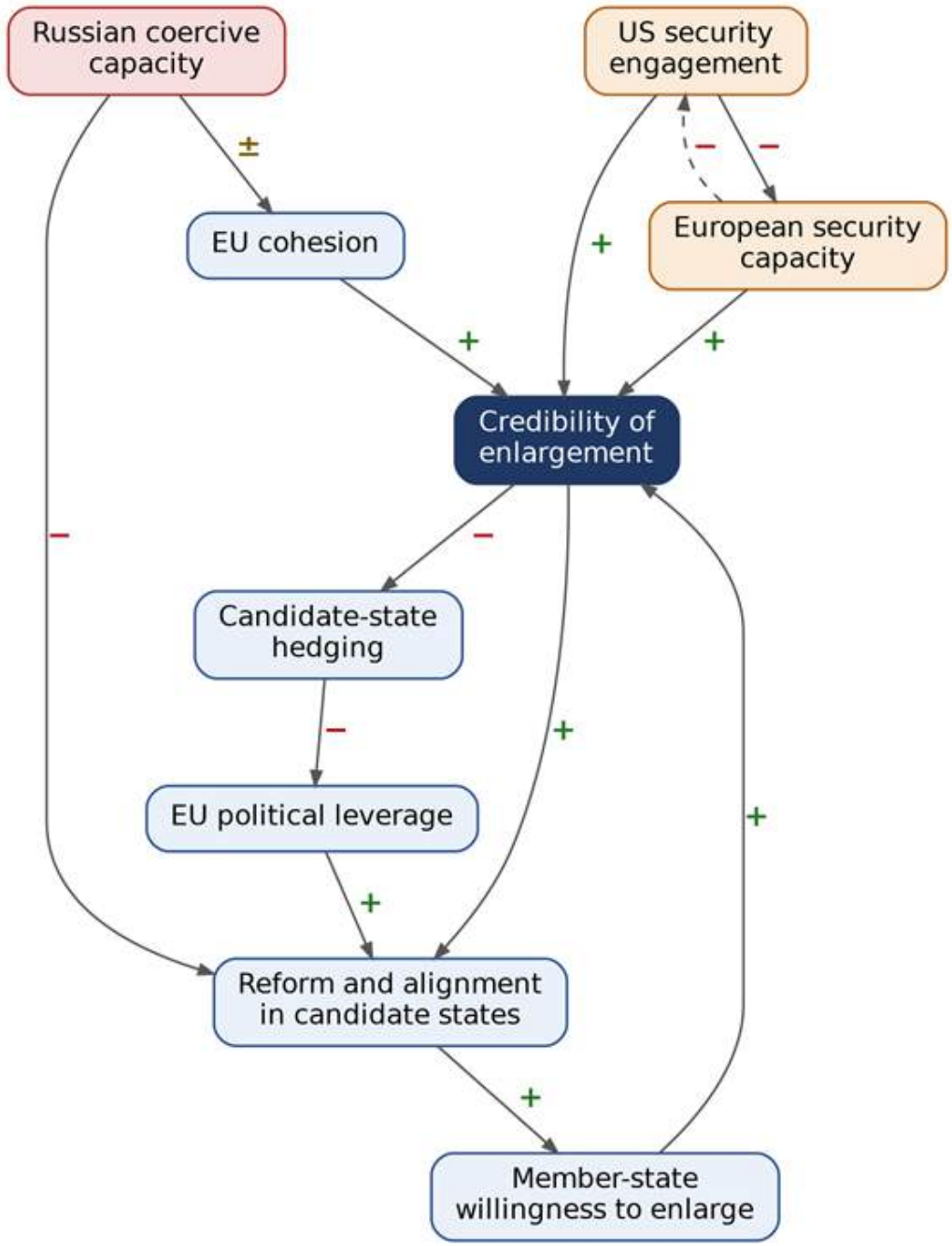
Figure 2: Main feedback relationships across the macroscenarios (illustrative).
"+" indicates change in the same direction, "−" change in the opposite direction and "±" an effect that can run either way; the dashed arrow marks a weaker or contingent relationship. The diagram is illustrative rather than an estimated model (cf. Sterman, 2000).



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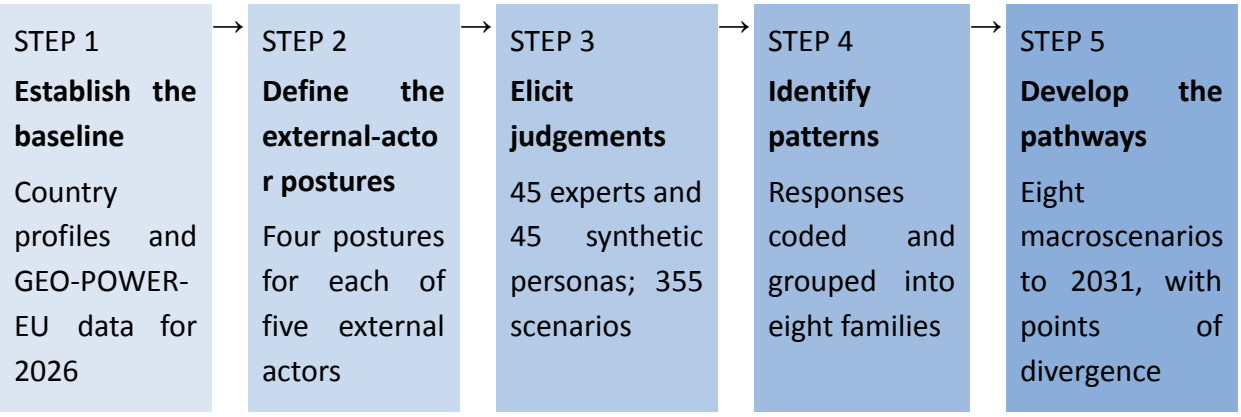
From evidence to macroscenarios in five steps

The method combines deductive and inductive stages. The research team first established a common framework of external-actor postures. Recurring forms of regional order were then identified in the scenario responses. The eight macroscenario families were therefore not defined in advance, but emerged through the clustering and subsequent analysis of the responses.

Figure 3: Development of the macroscenarios



Step 1: Establish the baseline. Every scenario begins from conditions in 2026. The team prepared a profile of each candidate state, structured around four dimensions: domestic agency, external relationships and interdependence, exposure to external pressure, and strategic assets. Country specialists reviewed each profile. Two GEO-POWER-EU sources informed the profiles: an Interdependence Database based on public data and two indices, derived from structured expert assessment, covering interdependence and exposure to risk. Dense ties to an external actor do not necessarily imply vulnerability, and the profiles maintained that distinction (Annex A.2).

Step 2: Define the external-actor postures. For each external actor, the two posture dimensions described above were arranged as a two-by-two matrix (Amer et al., 2013), producing four postures per actor (Table 3; full definitions in Annex B). Five actors with four postures each allow 1,024 possible configurations. These were not treated as 1,024 distinct futures, but defined the range of configurations available in the elicitation.

Step 3: Elicit judgements. Forty-five human experts completed a standardised online survey between April and September 2026. They responded individually and in writing, limiting group effects within the elicitation. Respondents first selected the posture they considered most

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plausible for each external actor by 2031. They then constructed four configurations, one for each scenario type, and described the resulting regional order, its implications for their country or thematic area, and its plausibility.

In parallel, 45 synthetic expert personas generated with an AI system completed the same survey. These personas do not constitute a second expert population: they draw on the same underlying language model and therefore share a common model-generated base of knowledge and reasoning. They served instead as a **controlled comparator**, showing where human judgements differed from a common synthetic baseline rather than corroborating or outweighing them. Human and synthetic responses were analysed separately throughout. In total, the exercise produced 355 valid scenario responses: 175 from human experts and 180 from synthetic expert personas (reconciliation in Annex A.1).

Step 4: Identify patterns. The scenario responses were analysed according to the form of regional order they described rather than the external-actor postures from which they began. The lead author reviewed each response and recorded its underlying regional logic, with a second researcher contributing to the analysis and development of the clusters. Recurring similarities across the responses were used to develop and progressively refine a set of scenario families. The resulting eight families therefore emerged inductively rather than being defined in advance. Borderline cases were assessed against the characteristics of the emerging families while retaining substantive variation within each. Annex A.5 documents the analytical dimensions, treatment of borderline cases and distribution of responses across the eight families.

Step 5: Develop the pathways. The authors developed each family into a macroscenario, specifying its assumptions, a plausible pathway from 2026 to 2031, the principal inflection points, and the conditions under which it could shift towards an adjacent macroscenario. Expert quotations illustrate the reasoning underlying the pathways. The narratives draw on the responses but do not aggregate them mechanically. This is the point at which expert evidence ends and the authors' interpretation begins.

Strengths and limitations

The approach has several strengths. A common framework makes expert judgements systematically comparable, while independent written responses limit group effects. Anchoring the exercise in country profiles and GEO-POWER-EU data connects the scenarios to conditions in 2026 without requiring them to extrapolate existing trends. The synthetic expert personas

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provide a controlled comparator against which patterns distinctive to the human responses can be identified.

Several limitations should be considered when interpreting the findings:

- **The human sample is concentrated in the research sector.** Experts were recruited purposively, largely through partner networks, and 36 of the 45 work in think tanks or universities. Policy, civil-society, business and international-organisation perspectives are less well represented. The findings therefore reflect structured judgements drawn primarily from the research and policy-analysis community rather than a representative cross-section of relevant expertise. Network-based recruitment may also have introduced selection effects.
- **The design shapes the results.** The predefined external-actor postures and scenario types made responses comparable but also structured the range of possibilities considered. The distribution of responses across the eight families is therefore conditional on the design of the elicitation.
- **The synthetic comparison has a limited evidential role.** The personas share a single underlying model, so agreement among them does not constitute independent corroboration. Differences between the human and synthetic responses can identify where their reasoning diverges, but cannot validate either set of responses (Annex A.4 and A.8).
- **The macroscenarios involve authorial interpretation.** They are syntheses developed from the scenario families rather than direct aggregations of expert responses. The audit trail in Annex A.5 makes this process traceable but cannot eliminate analytical judgement. Expert quotations provide evidence of the reasoning present in the responses rather than independent validation of the resulting narratives.
- **Comparability comes at some cost to actor-specific detail.** Applying the same posture dimensions to five different external actors necessarily simplifies differences between their political systems, capabilities and forms of regional engagement (Annex A.6).
- **The evidence is time-bounded and the macroscenarios are regional.** The elicitation was conducted between April and September 2026 and does not incorporate subsequent developments. The macroscenarios describe regional orders within which individual candidate-state trajectories can differ; they are not country-level forecasts.

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Structure of the report

The methodology description is followed by a review of the strategic context in 2026, which establishes the starting conditions for the scenario analysis. The report then presents the eight macroscenarios together, showing how the 355 scenario responses are distributed across them and comparing their characteristic external-actor configurations. The individual macroscenarios are subsequently examined in greater detail.

The macroscenarios are presented in three groups. Macroscenarios 1–3 are predominantly associated with baseline responses and describe different forms of continued EU structural predominance. Macroscenarios 4–5 are predominantly associated with preferred responses and describe more favourable regional orders based on different European and transatlantic security arrangements. Macroscenarios 6–8 are predominantly associated with nightmare and wild-card responses and describe three adverse forms of regional order: Competitive Disorder, Alternative Order [or Hierarchy] and Regional Vacuum.

Each macroscenario follows a common structure, presenting its evidence base and characteristic external-actor configuration before tracing a pathway to 2031 and examining the principal points at which that pathway could diverge. Comparative figures show how the eight macroscenarios relate to one another and how the position of individual candidate states varies across them.

The final section draws together the findings that recur across the macroscenarios and identifies the principal uncertainties and inflection points to monitor through 2031. Annex A provides further methodological documentation, including the clustering audit trail and synthetic-persona protocol. Annex B contains the full definitions of the twenty external-actor postures used in the elicitation. Annex C provides concise profiles for the candidate states.

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The Strategic Context in 2026

The EU candidate-state neighbourhood sits at the intersection of competing geopolitical interests. It extends from the Western Balkans through the Black Sea to the South Caucasus, encompassing states connected through EU enlargement but shaped by different historical trajectories, constitutional arrangements and security environments. For the purposes of this report, the neighbourhood comprises the Western Balkans – Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia – and the three candidate states of the Eastern Neighbourhood: Georgia, Moldova and Ukraine. It contains major transport and energy corridors, critical raw materials, unresolved territorial disputes and several of Europe's principal security flashpoints. Russia's full-scale invasion of Ukraine has increased its importance for European security, energy diversification and supply chains.

EU enlargement provides a common institutional framework without producing a common accession trajectory. It shapes institutional reform, regulatory approximation and political dialogue, but its credibility and political weight vary with progress towards accession. Montenegro has progressed furthest through negotiations, while Albania, Moldova and Ukraine have advanced substantially in recent years. Serbia's negotiations remain formally active but have effectively stalled; North Macedonia remains blocked by bilateral disputes; and Bosnia and Herzegovina has yet formally to begin accession negotiations despite the European Council's 2024 decision to open them. Georgia's accession process is effectively halted, while Kosovo has yet to obtain candidate status.

EU structural weight does not translate automatically into political cohesion. Member-state governments can constrain collective action for different reasons. Hungary under the Orbán government used its veto to impede Ukraine's accession progress; Slovakia has contested parts of the EU's sanctions and Ukraine-support agenda; and the Netherlands has insisted on strict, merit-based accession conditionality. Hungary's change of government in 2026 showed the reverse: domestic political turnover can remove a major blockage and expand the EU's room for manoeuvre.

Security conditions differ sharply across the neighbourhood. It includes NATO members and aspirants, constitutionally neutral states, territories under foreign military occupation and states protected partly through international security deployments. Russia's war against Ukraine has

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transformed the regional security environment. NATO's KFOR mission provides security in Kosovo, while EUFOR Althea, supported through cooperation with NATO, remains deployed in Bosnia and Herzegovina. Unresolved disputes in both states, alongside territorial conflicts in Moldova and Georgia, constrain state consolidation and regional stability.

Candidate states also differ in their external alignments and room for manoeuvre. Albania, Montenegro and North Macedonia are NATO members and established EU candidates, although their accession paths have progressed unevenly. Bosnia and Herzegovina and Kosovo remain closely connected to Euro-Atlantic institutions but operate within incomplete constitutional or international settlements. Moldova and Ukraine have accelerated their EU integration under sustained Russian pressure. Georgia combines strong societal support for European integration with a government whose policies have halted the accession process and diversified some of its external relationships. Serbia remains deeply integrated with the EU economy while maintaining substantial political, economic and security relationships with Russia, China and other actors, using them to preserve room for manoeuvre between competing external partners.

External powers pursue different objectives with different instruments. The EU retains relative structural predominance through trade, investment, enlargement, financial assistance and regulatory integration, although its weight varies across countries and sectors. The USA remains a major security actor through NATO, bilateral cooperation and military assistance, but the second Trump administration has broken with the assumption that American engagement reinforces European integration. Its strategic documents prioritise burden-sharing, bilateral relationships and US interests, while EU enlargement has disappeared as a stated objective. Russia combines military power and occupation, energy relationships, political and cultural networks and hybrid activity, with sharply different reach across the neighbourhood. China operates primarily through economic statecraft – infrastructure finance, industrial investment, technology partnerships and strategic-sector investment – but has also converted economic relationships into political support and diplomatic alignment in some cases. Türkiye combines defence cooperation, connectivity, energy, trade and diplomatic brokerage, particularly across the Western Balkans and Black Sea region.

EU structural predominance remains relative rather than exclusive. The EU is the principal economic and institutional reference point across most of the neighbourhood, but candidate governments cultivate alternative economic, political and security relationships. Their capacity to do so depends on geography, domestic politics, strategic assets and their position within the enlargement process.

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The outlook begins with an unevenly integrated regional space anchored primarily in European economic, regulatory and institutional structures. This predominance sits alongside less certain American security engagement, persistent Russian coercive capacity, selective Chinese and Turkish involvement, and substantial differences in candidate-state room for manoeuvre. The macroscenarios explore how this balance could change by 2031.

Scheduled inflection points, 2026-2031

Period	Inflection point	Key uncertainties	Macroscenario implications
November 2026	US congressional midterm elections	Whether Congress constrains or reinforces the administration's foreign and security policy; effects on spending, Ukraine and NATO	Could alter the character and durability of US engagement before the larger 2028 inflection point
2026-2027	EU MFF negotiations	Resources for enlargement, defence, infrastructure and external action; ability of member states to reach agreement; strength of conditionality	Tests both EU cohesion and the material credibility of the enlargement offer
April-December 2027	Elections in major EU member states	Political change in France, Italy and Poland; continuity of support for enlargement, Ukraine and greater European security responsibility	Could shift the internal coalition sustaining an EU-centred regional order
2026-2031	Candidate-state electoral cycles	Direction and durability of political change, particularly in Serbia (2026-2027), Bosnia and Herzegovina (2026), Montenegro (2027), Ukraine, Georgia (2028) and Moldova (2028)	Can alter reform and accession trajectories, external alignment, and prospects for resolving or escalating regional disputes.
2026-2030	China's 15th Five-Year plan	Scale and concentration of Chinese activity in infrastructure, industry,	Indicates whether China remains selectively engaged

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Period	Inflection point	Key uncertainties	Macroscenario implications
		technology, energy and critical raw materials	or acquires deeper leverage in particular states or sectors
May 2028	Turkish general election	Continuity of Türkiye's external posture; changes in defence, investment and political relationships in the Western Balkans	Could reinforce calibrated engagement, greater Turkish regional influence or retrenchment
November 2028	US presidential election	Continuity or reversal in NATO, Ukraine and EU policy; balance between multilateral and bilateral security relationships	A major branching point between transatlantic renewal, greater European responsibility and more competitive forms of regional order
2029	German federal and European Parliament elections	Continuity of German support for enlargement, Ukraine and defence; composition and priorities of the next EU institutional cycle	Could reinforce or weaken the political basis for enlargement and greater EU geopolitical capacity
2028-2031	Enlargement delivery	Whether advanced candidates accede or remain politically blocked; depth of integration short of membership	Tests whether differentiated enlargement restores accession credibility or settles into durable association without transformation

Potential shocks or discontinuities, 2026-2031

Event	Key uncertainties	Macroscenario implications
Major change in the war in Ukraine	Terms and durability of any ceasefire or settlement; major	Could reshape Ukraine's integration trajectory, Russia's regional capacity and the security

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Event	Key uncertainties	Macroscenario implications
	military reversal; changes to US and European security guarantees	exposure of other candidate states
US–China confrontation over Taiwan	Scale and duration; diversion of US military capacity; European alignment; disruption to trade and technology	Could reduce US attention to the neighbourhood and increase demands on European security and economic capacity
Russian attack on European NATO territory	Scale and location; US response; NATO cohesion; duration and geographical extent of hostilities	Could subordinate enlargement to immediate security demands while increasing candidate states' strategic importance and exposure
Collapse of the Euro-Atlantic alliance	US withdrawal from or effective abandonment of NATO; coercive action against a European ally or territory; European response and alliance cohesion	Could abruptly remove the neighbourhood's principal security framework and force a rapid test of European strategic capacity
Renewed conflict in the candidate-state neighbourhood	Location and scale; external-actor involvement; effectiveness of existing crisis-management arrangements	Could weaken conflict containment, intensify external intervention and deepen political divisions among candidate states
Major internal crisis in Russia	Leadership succession; regime stability; military cohesion; degree of central control over state institutions and territory	Could reduce Russian leverage while creating new security risks for Ukraine, Moldova, Georgia and the wider neighbourhood
Türkiye–Israel military confrontation	Scale and duration; US involvement; wider regional escalation; consequences for Türkiye's European relationships	Could reduce Turkish engagement in the neighbourhood and place additional demands on US and European capacity
Partial quantum computer breakthrough	Technological significance; external actor achieving it; vulnerability of	Could expose candidate-state infrastructure and create new technological dependencies on

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Event	Key uncertainties	Macroscenario implications
	existing cryptography; speed of adaptation	actors able to provide secure systems
Severe climate shock	Location and severity; effects on energy, infrastructure, agriculture, migration and public finances	Could aggravate fiscal and political vulnerabilities while increasing demands for external assistance and regional coordination
AI investment correction or wider financial shock	Scale of market correction; effects on investment, fiscal capacity and technology sectors; transmission to Europe	Could constrain EU funding and investment while increasing economic vulnerabilities and financing needs among candidate states
Chinese-backed rail corridor and/or 5G infrastructure expands across several candidate states	Geographic reach; reliance on Chinese financing and suppliers; compatibility with EU and/or US networks, security requirements and standards	Could create durable Chinese economic or technological leverage, producing dependence or creating regulatory incompatibility

Macroscenario Framework

The eight macroscenarios represent distinct forms of regional order. They differ in which external actors have sufficient capacity to structure the regional environment, how far they can constrain candidate-state choices, and whether relationships with competing external powers remain compatible. Candidate states can reinforce or weaken these patterns through decisions to align, resist, hedge or diversify.

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The macroscenarios are ordered first by scenario type under which they predominated and, within each type, by the prevalence of the underlying macroscenario family in the expert responses. Their ordering is not indicative of probability:

Scenario type	Macroscenario	Regional order
Baseline	*Procedural Enlargement*	EU structural predominance persists through economic, regulatory and institutional integration, while accession remains politically constrained and loses transformative force. [1]
	Managed Geopolitical Diversification	EU structural predominance persists while candidate states gain greater scope to diversify their external relationships.
	Differentiated Enlargement	Credible differentiation restores a stronger relationship between reform, integration and accession, producing divergent trajectories among candidate states.
Preferred	*Transatlantic Renewal*	Renewed US security engagement complements stronger European political and economic order-setting.
	European Strategic Leadership	Stronger European geopolitical and security capacity increases EU order-setting and narrows the scope for candidate-state hedging.
Nightmare	*Alternative Order*	Alternative asymmetric dependencies become strong enough to constrain candidate-state choices as Euro-Atlantic predominance recedes.
	Competitive Disorder	Intensified geopolitical competition produces incompatible external relationships without durable predominance.
	Regional Vacuum (Wild card)	Neither incumbent nor alternative external actors retain sufficient capacity to organise or contain the regional order.

Table 4: Summary of macroscenarios

[1] Managed Geopolitical Diversification was the more prevalent baseline cluster, but Procedural Enlargement is presented first because it corresponds most closely to the Strategic Context from which the foresight exercise begins.

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Figure 3: Distribution of Expert Scenarios across Macroscenario Families, by Scenario Type

Source: supplied response counts. Human experts: 175 scenario entries; synthetic experts: 180 scenario entries; generated with ChatGPT.

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Figure 4: Macroscenario Plausibility and Scenario Type

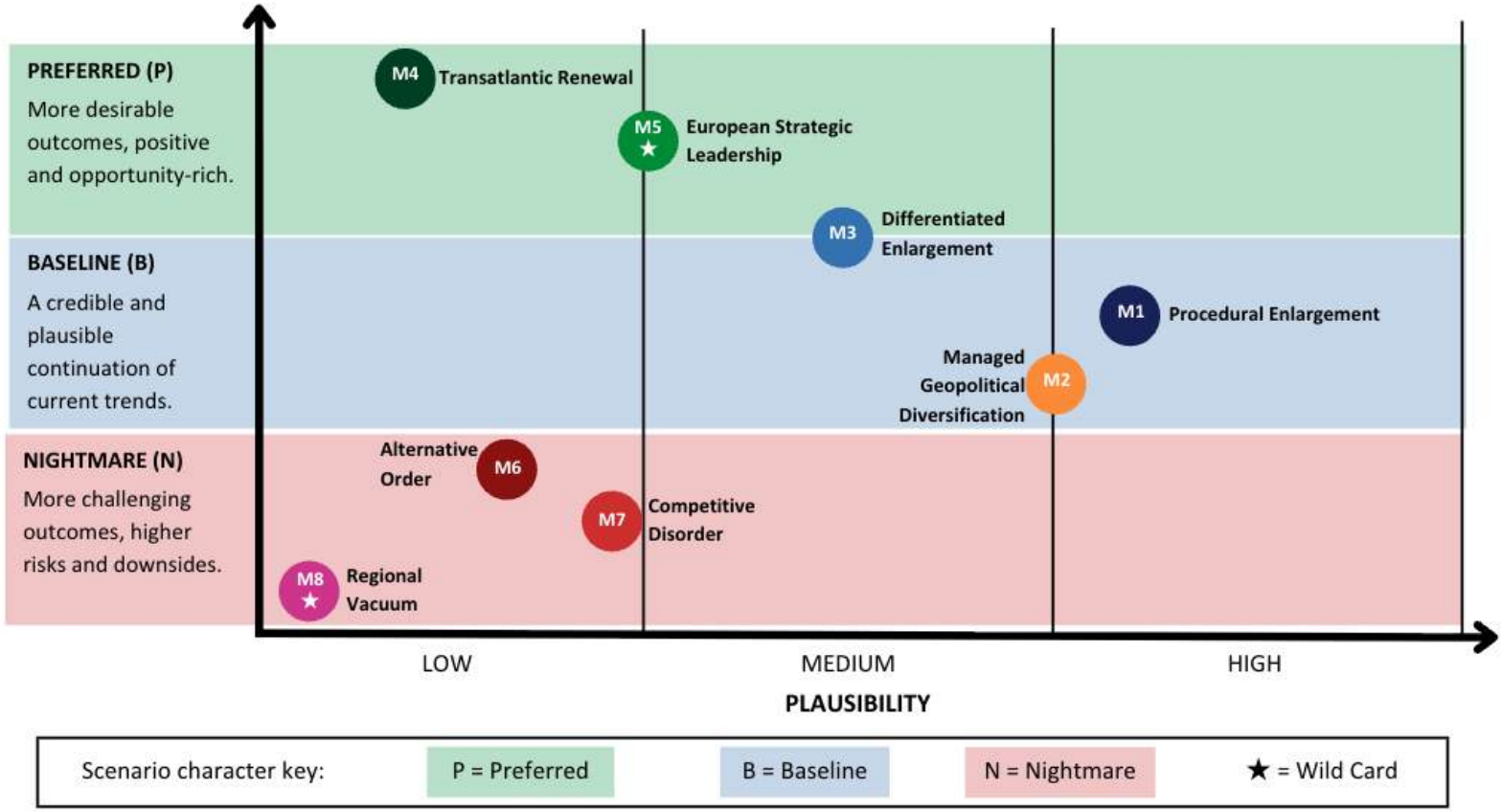

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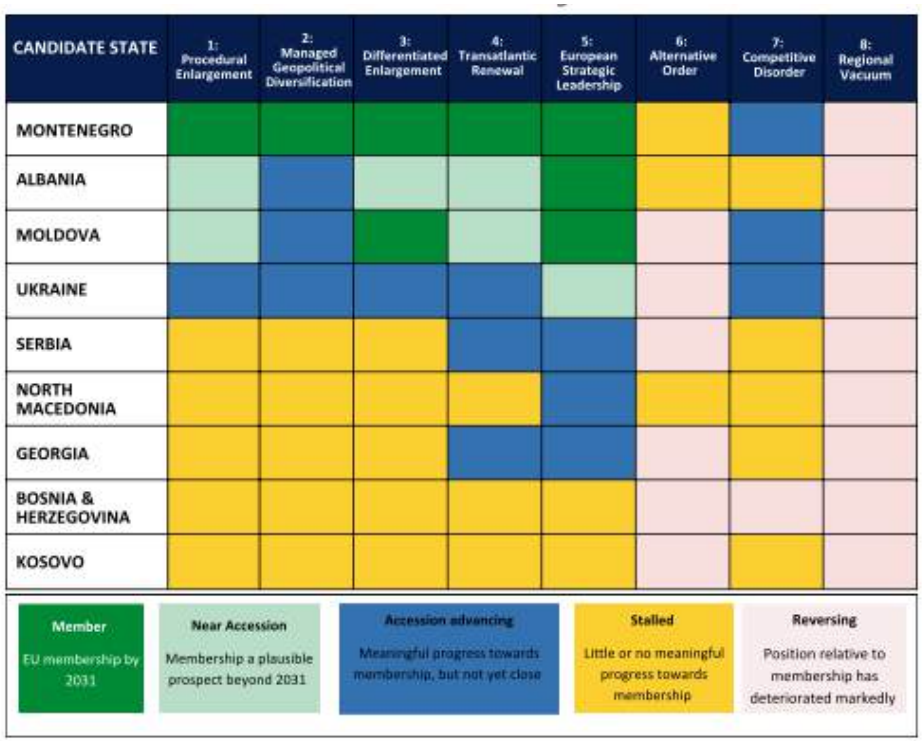
Figure 5: Candidate States across the Macroscenarios



Note: Status reflects the overall trajectory by 2031, not a ranking of desirability.
Georgia: "re-engaging" indicates renewed movement toward the EU while remaining in the stalled/distant-accession category.

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MACROSCENARIO 1 | Procedural Enlargement

Scenario type: Baseline
Plausibility: Medium-high to high
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	*Proactive Order-Setter*	*Restrained Strategist*	***Technocratic Order-Setter***	*Declining Stakeholder*
United States	*Regional Security Architect*	*Strategic Retrenchment*	***Distracted Security Leader***	*Chaotic Withdrawal*
China	*Regional Order-Shaper*	***Selective Economic Engagement***	*Overextended Expansion*	*Residual Engagement*
Russia	*Consolidated Expansionist*	*Strategic Retrenchment*	***Unstable Expansionist***	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	***Calibrated Regional Power***	*Overreaching Broker*	*Regional Retreat*

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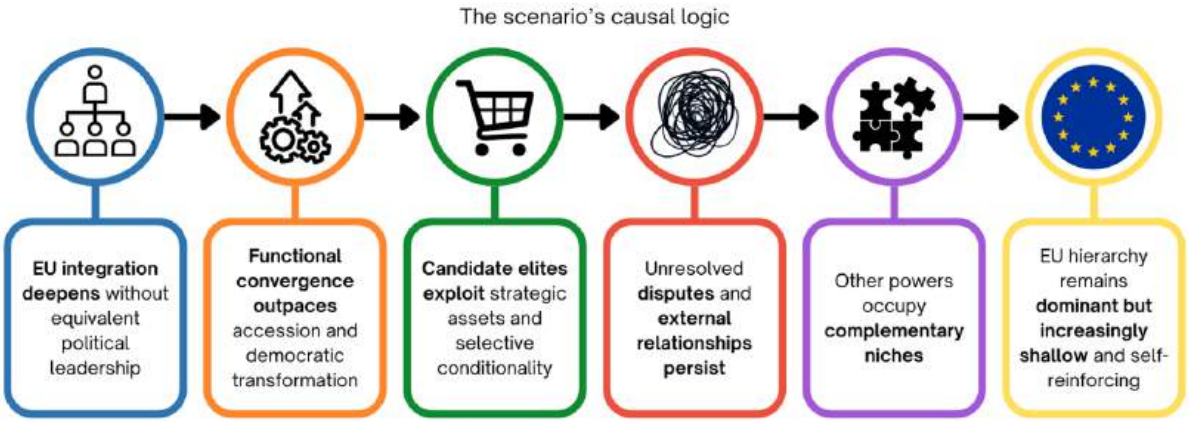
Snapshot: 2031

By 2031, much of the candidate neighbourhood is becoming European without becoming EU. Markets, regulations, infrastructure and energy networks pull states deeper into Europe. Governments absorb the benefits while rationing reforms that threaten entrenched interests. The accession machinery keeps turning: chapters close, benchmarks multiply, funds flow and regulations converge. Montenegro has joined, but accession remains exceptional. Procedure has become easier to sustain than the political decisions it was designed to produce.

There are few, if any, grand bargains; change accumulates instead. Ukraine has become part of Europe's defence, industrial and energy systems without membership. In Moldova, years of trade, infrastructure and energy integration have weakened the economic logic of Transnistrian separation enough to make reintegration conceivable. Bosnia and Herzegovina demonstrates the opposite: integration can advance around a constitutional deadlock without resolving it. Serbia integrates still further into Europe while retaining Russian and Chinese relationships and converting its role in regional crises into leverage with the EU and USA.

Europe faces no competing regional order. China invests inside an economy organised around EU markets and standards. Türkiye finds advantage in the same arrangement. Russia can obstruct European objectives but offers no comparable economic or institutional destination. The USA selectively underwrites regional security while largely leaving the EU to manage enlargement.

The EU has become harder to avoid but no easier to enter. Its reach has expanded faster than its capacity to transform the states within it.



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Pathway to 2031

In 2026, political agreement among EU member states over how far and how fast enlargement should proceed remains weak. Over the following years, this gap widens. Elections in France, Poland, Germany and Italy, as well as for the European Parliament, constrain ambitious decisions between 2027–29 without overturning support for closer integration with the candidate neighbourhood. EU governments continue to regard integration of the Western Balkans, Ukraine and Moldova as a security priority, particularly while Russia remains a threat. Yet this geopolitical framing does not produce a corresponding European security strategy for the neighbourhood. Agreement remains thin over institutional reform, financial burden-sharing, accession timetables and politically difficult candidates. The EU retains what one expert calls *"formal centrality as the dominant institutional horizon,"* yet *"enlargement remains rhetorically alive but politically hesitant."*

The EU shifts towards forms of integration that can advance without agreement on accession. The Growth Plan for the Western Balkans, staged participation in the Single Market, energy integration, infrastructure investment and access to EU programmes extend economic, financial and institutional benefits while accession negotiations proceed at different speeds. The 2028–34 Multiannual Financial Framework increases resources for Ukraine and the candidate neighbourhood but fails to establish predictable progression from staged integration to membership. Rule-of-law conditionality remains embedded in funding, although security and stability considerations make enforcement less consistent. The result resembles the *"one step forward, one step back"* pattern described by a Montenegrin rule of law expert. A Western Balkan specialist working in the private secto describes an EU whose *"'hegemony' is regulatory in kind and isn't matched by any coherent strategic vision for the neighbourhood."*

Candidate governments adapt to integration without accession by separating technical compliance from political reform. Funding, infrastructure, market access and security cooperation deliver benefits before the most politically difficult conditions of membership become binding. For some incumbents, this becomes an attractive equilibrium: deeper integration supplies resources and political legitimacy while reforms threatening entrenched interests can be delayed. Governments become adept at separating technical compliance from political transformation. In Albania and Moldova, incumbents associate continuity with progress towards the EU; Ukrainian politics remain conditioned by wartime conditions; entrenched systems elsewhere benefit from fragmented oppositions, influence over state institutions and the premium the EU places on stability. Serbia remains the principal exception, combining deep

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economic and institutional integration with the EU with extensive external partnerships and substantial leverage over regional issues. EU ambiguity provides what a Western Balkan geopolitics specialist calls *"good ground for stabilocratic policy,"* particularly in Serbia and Albania.

EU structural predominance does not translate into consistent political leverage. Dependence on EU markets, finance and institutions gives the Union considerable potential leverage over candidate governments, but reliance on those same governments for migration, energy, connectivity, security and regional crisis management weakens its willingness to use it. Serbia's capacity to influence developments in Kosovo and Bosnian Serb politics, and to help contain the resulting tensions, gives it particular latitude with the EU and USA. One Western Balkans specialist focusing on political and social dynamics expects that authoritarian consolidation produces *"an outcome with which the EU will be fine with so long as these authoritarians play along on key security issues."* Captured institutions, opaque financial networks and weak information environments preserve channels for Russian influence and corrosive capital, including from EU member states and the USA. Limited reform leaves these vulnerabilities intact, increasing European and American reliance on governments capable of containing them and further weakening conditionality.

The accession process becomes still more procedural as its transformative effect declines. Screening, benchmarks, reform agendas and funding conditions remain in place. As a Moldovan researcher puts it, *"enlargement risks becoming an administrative process rather than a transformative political project."* For candidates further from accession, intermediate integration increasingly resembles a durable status rather than a transitional stage, but remains embedded in the accession framework**.** Reforms threatening established political and economic interests become harder to justify when their costs are immediate but membership remains uncertain. Yet expanding market access, investment and institutional cooperation means that scepticism towards accession does not produce geopolitical realignment away from the EU.

Ukraine takes integration without membership furthest. By 2028–29, whether fighting continues or gives way to an unstable ceasefire, no durable security settlement has emerged. Russia remains heavily constrained by the costs of the war but retains sufficient military, intelligence and political capacity to threaten Ukraine and attempt destabilisation of states elsewhere in the candidate neighbourhood and the EU. Ukraine deepens its role as a central contributor to European defence through its military experience, defence-industrial capacity and technological innovation, while supporting Moldova and other candidates in countering

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Russian covert activity and political influence operations. Its trajectory is described by a regional security expert at an international organisation: *"Ukraine survives as a state and deepens integration into the EU and the West more broadly but fails to secure membership."* Continued wartime conditions leave Ukraine deeply integrated into European security and industry while conventional accession remains difficult.

American retrenchment stops short of withdrawal. The USA retains military, intelligence, financial and sanctions leverage, while NATO continues to guarantee its members in the candidate neighbourhood and contributes more widely to deterrence. The USA does little to shape the EU's political strategy towards the candidate neighbourhood, intervening selectively where security crises, bilateral relationships or specific American interests demand it. Its approach remains transactional through 2028–31, while MAGA-aligned political networks cultivate relationships with European nationalist and illiberal actors opposed to greater EU cohesion. Even if the 2028 presidential election softens the tone of transatlantic relations, American power continues to underpin parts of the regional security architecture without producing a joint Euro-Atlantic strategy for the neighbourhood.

In Bosnia and Herzegovina and Kosovo, deeper integration fails to resolve the principal political obstacles to accession. EUFOR, financial support and diplomatic intervention sustain EU-led security management in Bosnia and Herzegovina, but the fragmented Dayton system obstructs decisive progress towards membership. In Kosovo, EU funding and sectoral market access drive regulatory alignment, bringing its energy, payments, customs and transport systems closer to EU frameworks. Yet continuing non-recognition prevents these advances from opening a path to formal candidacy. Crisis management remains the default. EUFOR and KFOR contain the security consequences of unresolved disputes, while EU and NATO mediation produces limited agreements without removing their underlying causes.

Physical and economic integration outpaces accession. Corridor VIII links Albania and North Macedonia more closely to EU transport and NATO military-mobility planning, while Corridor Vc can integrate Bosnia and Herzegovina physically into EU networks faster than its political system integrates institutionally. European demand for critical raw materials increases the leverage of governments already embedded in EU supply chains. Serbia's Jadar lithium deposit and Chinese-owned Bor copper complex, Ukraine's larger mineral endowment and the latent potential of Kosovo's Trepča complex become more important to European industrial security. The EU consequently has stronger interests in securing access while enforcing environmental, governance and rule-of-law conditions. Investment and growth can coexist with persistent

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institutional weakness and unequal gains where politically connected capital shapes their distribution.

In Moldova, integration begins to alter the incentives sustaining a frozen conflict where deliberate political efforts have failed. Closer integration with EU markets, infrastructure and energy systems draws Transnistria further into an EU-oriented economic environment, while the costs of the war constrain Russia's ability to sustain the separatist region on previous terms. By 2030–31, reintegration through economic incentives, guarantees and transitional arrangements becomes conceivable without Moldovan membership or a wider settlement between Europe and Russia.

Montenegro tests whether integration short of membership can still culminate in accession. Around 2029–30, pro-European forces secure a mandate around imminent accession, negotiations are completed and member states approve admission. Its small size, NATO membership, use of the euro and advanced compliance with EU requirements make it unusually absorbable. One Western Balkan think-tank analyst expects accession to give *"the EU a slight boost, but […] fail[…] to translate into any new impetus."* After years of delay, the EU has its own interest in securing a visible accession success and presents Montenegro as proof that enlargement still works. It then returns its attention to Single Market access, infrastructure funding and sectoral integration for candidates further from membership. Albania and Moldova continue towards admission; Bosnia and Kosovo remain structurally blocked; Serbia, Georgia and increasingly North Macedonia combine candidacy with domestic political trajectories that weaken accession's transformative effect; Ukraine's integration deepens under continuing wartime conditions.

External powers adapt to and exploit an uneven EU-centred regional order without constructing an alternative to it. Chinese manufacturers and investors use candidate states to access an increasingly integrated European economic space, expanding their presence within rather than outside the EU-centred economy**.** Türkiye retains roles in trade, connectivity, defence and political brokerage. Russia remains the exception: it seeks to disrupt European consolidation but lacks the capacity to construct a competing regional order.

Where the pathway could diverge

Experts converge on the starting logic of this macroscenario but disagree over how long its intermediate equilibrium can last. Human experts repeatedly envisage continued EU structural

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predominance alongside weaker enlargement credibility, inconsistent conditionality and greater candidate-state hedging. Of the 14 human experts who outlined this broad scenario, 13 designated it as their baseline. Ten synthetic personas outlined a similar scenario and reproduced much of the same structure. Some experts regard this equilibrium as durable; others see its ambiguity as a source of instability. A Western Balkan academic describes its corrosive version starkly: “everyone pays at least lip service to the euroatlantic agenda, everyone is calculating, reforms don't really happen, global trends slowly corrode the region.” Another academic that “key tensions and vulnerabilities arise from being left adrift without a clear path to access EU structures and resources.”

Integration without membership becomes unstable if it loses political credibility. A Moldovan researcher identifies the critical point as “the moment when EU enlargement either becomes politically credible and time-bound or begins to look permanently postponed.” Political shifts in major member states and negotiations over the 2028–34 EU budget will test that credibility. One Western Balkans specialist expects that “the EU will fail to enlarge in any of the regional countries,” leaving the Western Balkans and Eastern Partnership as an “external non-value based layer” of the Union. Enlargement could become “increasingly uneven and geopolitical rather than rules-based,” while the candidate states' “de-facto treatment as a buffer zone increasingly reduces the EU’s relationship with candidate countries to mere transactionalism.” Market access, infrastructure and investment could deepen as conditionality weakens and oligarchic rents become more entrenched. Greater political agreement among EU member states could instead link sectoral and regulatory integration to a predictable accession timetable. Procedural Enlargement lies between these outcomes: accession remains attainable enough to shape candidate behaviour without becoming credible enough to generate a wider breakthrough.

Montenegro could preserve that balance by joining without triggering wider accession. The macroscenario envisages membership around 2029–30. Several experts regard accession around the end of the decade as realistic, while a Western Balkans think-tank analyst expects the reverse: “I expect the fake accession momentum to collapse in 2027,” followed by electoral defeat for the government and a resurgence of pro-Serbian forces. Montenegro's accession could contain pressure for wider enlargement by giving the EU a visible success without resolving the harder political and institutional obstacles elsewhere. If it generates momentum for Albania, Moldova or others, the neighbourhood moves towards Differentiated Enlargement or European Strategic Leadership. Failure by even the most readily absorbable candidate would

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make staged integration harder to distinguish from permanent peripheralisation and increase the appeal of multi-vector strategies.

Russia must remain constrained and Ukraine geopolitically aligned with Europe. Russia remains capable of threatening its neighbours but unable to construct a competing regional order, while Ukraine is deeply integrated into European security and industry but outside the EU. One regional analyst expects “if not an outright defeat of Russia, then at least a de facto Ukrainian victory,” followed by Russian internal turmoil and accelerated EU integration for Ukraine and Moldova. This could facilitate Transnistrian reintegration, although a settlement might force the issue prematurely: “If a future settlement of the Russian-Ukrainian war touches upon Transnistria, Moldova may face pressure to address reintegration faster than its institutions and society are ready for.” Sustained Russian weakness would also widen the scope for political reorientation in Georgia. At the other extreme, “an emboldened Russia might look to expand its influence and continue undermining the European cohesion and leadership in the candidate countries.” Russian recovery would increase pressure on Moldova and Georgia and shift European attention from integration towards containment. Ukrainian survival does not guarantee continued geopolitical alignment: an analyst at an international organisation envisages “a mildly Eurosceptic leader and a policy akin to Turkey's.” Decisive European strategic leadership, renewed Russian expansionism or Ukrainian strategic realignment would move the region beyond Procedural Enlargement.

Selective American engagement depends on a credible regional security architecture. In one account the USA remains “strategically present but politically indistinct: important in security terms, yet uneven, reactive, and often lacking a clearly articulated regional vision beyond crisis management.” Another expects “the US [to] remain key for security but less predictable.” A substantial reduction in the American security footprint could weaken deterrence: one regional specialist working in the private sector warns that “the United States’ reduced security footprint/military exit from the region significantly weakens deterrence.” The Serbian government could then become “emboldened to use proxies to stage incursions into northern Kosovo,” while weakened international mechanisms in Bosnia and Herzegovina give separatist politics greater scope. American political engagement presents a different risk if MAGA-aligned networks strengthen nationalist and illiberal actors while US security commitments remain intact. Renewed US leadership after 2028, coupled with closer EU coordination, would pull towards a renewed Euro-Atlantic order. Procedural Enlargement depends on continued American security power without a corresponding American role in organising the wider regional order.

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Domestic political change could upset the pattern of incumbent adaptation. One analyst envisages regime change in Serbia through a post-election uprising, arguing that "democratic civic revolution, despite & against the EU's 'order-setting' enlargement policy could have potential positive regional bottom-up repercussions" in Montenegro, Bosnia and Herzegovina and possibly Albania. Democratic renewal could restore reform pressure independently of stronger EU conditionality and support regional cooperation not organised by an external power. Political agency could also pull states towards bilateral alignments or other external actors. With weaker EU engagement, an analyst at a regional think-tank speculated that they might "develop their own, autonomous future horizons via bilateral strategic decisions or by shifting towards other actors' sphere of influence." Selective compliance and tactical hedging fit within Procedural Enlargement; wider democratic rupture, autonomous regional consolidation or strategic realignment would not.

Hedging changes the regional order once external relationships enable choices no longer anchored primarily in the EU. Most experts keep China and Türkiye below this threshold but differ over what greater candidate autonomy could produce. Political elites control access to strategic sectors, broker relationships with external investors and security partners, and can use those relationships to reinforce their domestic position. One expert envisages weaker EU engagement triggering an "explosion of defence spending in the Western Balkans, the emergence of local military coalitions plus flourishing of minilateral bonds to EU member states and other actors." Two others expect greater Chinese competition with the EU over resources and transport corridors. These relationships can supplement EU markets, finance and institutions without displacing their structural predominance. If they begin to support political or security choices substantially independent of the EU, hedging starts to reorganise the regional order.

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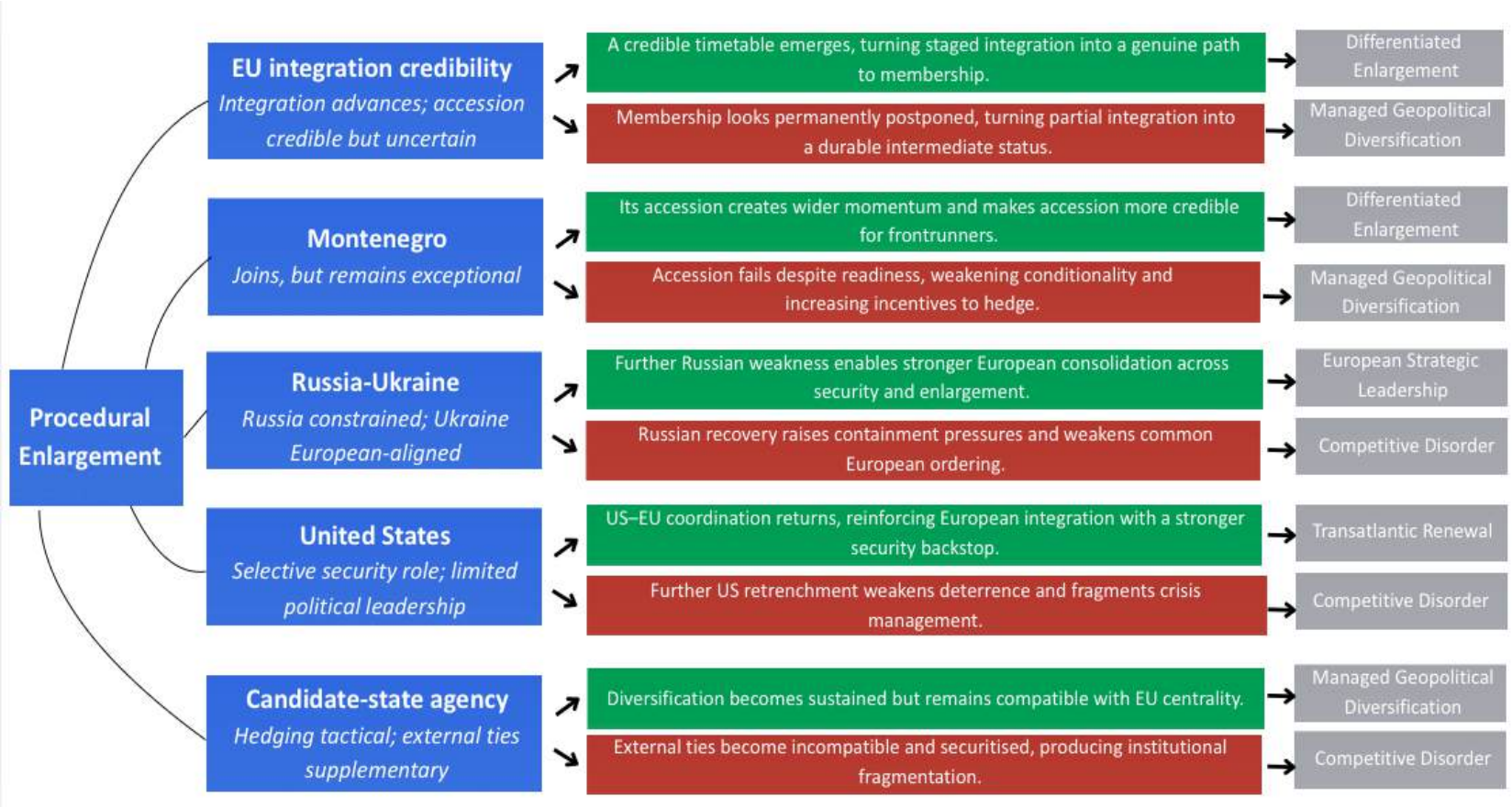
Figure 6: Divergence Tree (Procedural Enlargement)



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MACROSCENARIO 2 | Managed Geopolitical Diversification

Scenario type: Alternative baseline
Plausibility: Medium-high
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	*Proactive Order-Setter*	*Restrained Strategist*	***Technocratic Order-Setter***	*Declining Stakeholder*
United States	*Regional Security Architect*	***Strategic Retrenchment***	*Distracted Security Leader*	*Chaotic Withdrawal*
China	*Regional Order-Shaper*	***Selective Economic Engagement***	*Overextended Expansion*	*Residual Engagement*
Russia	*Consolidated Expansionist*	***Strategic Retrenchment***	*Unstable Expansionist*	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	***Calibrated Regional Power***	*Overreaching Broker*	*Regional Retreat*

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Snapshot: 2031

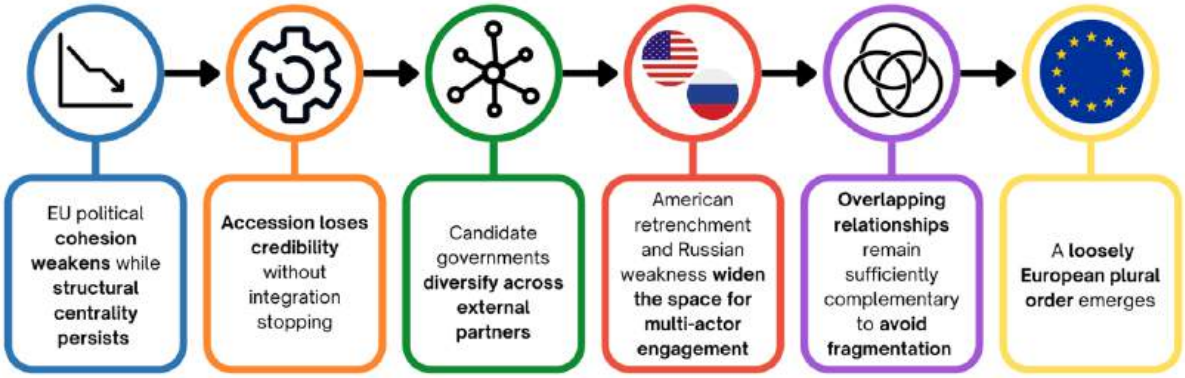
By 2031, almost every conventional measure suggests that Europe's position in the candidate neighbourhood has strengthened; the politics tell a different story. EU rules govern more of the candidate economies, European money has built more infrastructure, and dependence on the Single Market has deepened. Yet nationalist and sovereigntist gains inside the EU have weakened political cohesion over enlargement, foreign policy and burden-sharing. Montenegro has finally joined, but the victory is pyrrhic: one small accession has not restarted enlargement. Albania, Moldova and Ukraine have moved closer without knowing when, or whether, they will enter. Europe has mistaken growing structural predominance for political primacy. The latter has quietly slipped away.

Serbia once appeared the exception: economically bound to Europe while cultivating China, Russia, Türkiye and the USA. **By 2031, the exception has begun to look like a prototype.** Even committed EU candidates divide their needs among different partners. If European finance, technology or security comes on unattractive terms, governments increasingly have alternatives. The choice is rarely Europe or China, Europe or Türkiye, Europe or America. It is more often Europe and them.

That suits the other powers. China and Türkiye gain from operating inside an economy increasingly connected to the EU. Washington retains enormous security weight but pursues bilateral objectives that can cut across common EU positions. Russia uses selective normalisation, political networks and unresolved conflicts to preserve influence as it rebuilds after the war in Ukraine. None of these relationships yet requires exclusive alignment.

The EU has never been more deeply embedded in the region; it has simply become less able to determine what that embeddedness buys.

The scenario's causal logic



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Pathway to 2031

Between 2027 and 2029, political changes inside the EU weaken the consensus behind enlargement. Elections strengthen nationalist and sovereigntist forces in several major member states, sharpening disputes over migration, fiscal transfers, agricultural spending and institutional reform. Russia and a USA willing to work around EU institutions exploit these divisions for different purposes, complicating attempts to build a more autonomous European policy. The EU retains its funding, regulatory and accession machinery, while member states and coalitions pursue particular security, infrastructure and commercial priorities. As one geopolitical specialist put it, "What changes is not the formal centrality of the EU, but the degree to which local actors believe that Brussels can shape outcomes on the ground." The neighbourhood remains, in a Turkish academic's assessment, "formally anchored to the EU but […] increasingly shaped by strategic pluralism in practice." Candidate governments gain more scope to combine continued EU integration with bilateral and sectoral relationships beyond it.

The 2028–34 MFF preserves enlargement instruments without resolving the politics of enlargement. Pre-accession funding, infrastructure investment and staged participation in European markets and programmes continue without establishing a predictable route to membership. Montenegro, having completed most technical requirements, eventually enters around 2029–30 after renewed political objections and difficult ratification, under extensive transitional arrangements. Its accession consumes rather than generates momentum. Excluding a small NATO member would have discredited the process; admitting it does little to overcome resistance to further expansion. Albania continues closing negotiating chapters and Moldova deepens its participation in the single market, yet neither secures a predictable route to membership. An academic specialised in regional governance describes how candidate states would continue to align or profess alignment with the acquis, but "misalignment goes unchecked […] and genuine alignment goes unrewarded." Intermediate integration begins to "normalise a semi-integrated status: candidate states become more connected to the EU, but remain outside its political core." Governments increasingly treat the benefits of European integration as separable from wider geopolitical alignment with the EU.

Technical cooperation continues but becomes more dependent on national implementation. Sectoral and minilateral initiatives remain active across energy, infrastructure and regulation. The Energy Community, for example, can advance energy integration without compelling governments to undertake politically costly reforms, while the Danube Strategy cannot overcome infrastructure, governance or pollution failures without national cooperation. EU

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rules continue to produce what a senior economist at a regional bank described as “partial Europeanisation”, but with less leverage over the political choices that determine how far it goes.

Candidate governments use the widening gap between integration and accession to diversify. EU market access and finance remain indispensable, but indefinite accession reduces the political value of geopolitical alignment with the EU, particularly where governments are expected to follow EU sanctions and foreign-policy positions. As the Turkish academic observed, governments “will not abandon the EU” and may instead “increasingly treat it as one pole among several rather than the only meaningful horizon.” Serbia, already practiced at converting competing external relationships into political and economic leverage, provides the most developed model for a strategy that other candidate governments begin to adopt selectively. Critical raw materials expose the difference. European demand draws Serbia and Ukraine deeper into critical-mineral supply chains, but Serbia combines it with Chinese mining and processing investment while Ukraine uses it to deepen industrial integration with the EU. As a Kosovan analyst noted, “regional actors diversify their relationships tactically through issue-by-issue pragmatism across investment, energy, and security.” By the end of the decade, “geopolitical alignment becomes a fluid, issue-by-issue marketplace.”

Large-scale fighting in Ukraine subsides around 2027–28, loosening some of the geopolitical discipline produced by the war. An armistice or unstable ceasefire leaves the territorial question unresolved while Russia begins military and economic reconstitution. Russia tests European cohesion through offers of selective normalisation and retains cheaper instruments of influence and disruption across the neighbourhood. Ukraine remains deeply connected to the EU through reconstruction, defence, energy and trade, but disputes over market access, migration, financial support and relations with Russia repeatedly divide member states. Its strategic importance does not produce agreement on membership. Russia lacks the capacity to organise an alternative regional order but can still exploit sanctions gaps, political networks and unresolved conflicts.

US security power remains in Europe while American bilateralism weakens EU political order-setting. American military, intelligence and financial capabilities remain formidable, but their availability becomes less predictable. As a Western Balkan geopolitics specialist explained, “[this] does not necessarily mean complete absence, but rather a hollowing-out of credibility.” Another expert described the USA as “a shadow security guarantor.” The US administration works through bilateral relationships, supports political forces sympathetic to its agenda and

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uses security or commercial access to extract concessions, including where this weakens common EU positions. Reduced funding also shrinks international presences and conflict-management mechanisms that had depended on American sponsorship. Serbia can sustain military neutrality and geopolitical balancing at lower external cost. Kosovo deepens defence cooperation with Türkiye and develops domestic ammunition and drone production, while Serbia and Kosovo invest in capabilities without a corresponding regional arms-control or confidence-building framework. Türkiye expands its defence role elsewhere in the neighbourhood and in the Black Sea; Ukraine becomes a source of military expertise and defence technology.

Diversification remains manageable because most external relationships remain compatible. As a civil society representative from the Eastern Neighbourhood put it, “The interaction pattern that emerges is one of tacit division of labour rather than open EU rivalry with the others.” A government can rely on European markets while procuring Turkish defence equipment, accepting Chinese infrastructure investment or cultivating American security ties. One Western Balkan academic argued that “Turkey and China are not interested in dismantling the EU integration of the region because they would benefit from having their infrastructural and defence-related engagement parachuted to the EU via accession.” Türkiye combines deeper economic and defence ties with access to a regional economy still centred on the EU. Non-European relationships become durable components of national strategy without displacing EU structural predominance.

Diversification spreads beyond the neighbourhood's established hedging states. North Macedonia carries the same logic into the green transition. European institutions and non-EU partners already finance its shift away from lignite. As accession stalls, the government combines EU funding for coal-site conversion, grids and storage with private investment in wind and solar, Turkish investment in gas infrastructure and Chinese capital and technology in renewable generation. When EU funding carries costly conditions on coal closure, procurement or governance, the government delays the project, modifies it or turns to other sources of finance. North Macedonia continues integrating its electricity market with the EU. Other candidate governments follow similar paths, pursuing decarbonisation while reducing the EU's leverage over how they finance and manage the transition.

Diversification gives governments more room to resist EU conditionality. As a civil society representative argues, “EU accession leverage tends to function best against actors who fear losing Western integration; it functions poorly against elites who can hedge across four

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competing patrons at once." Bosnia and Herzegovina shows the political consequences. The deadlock over the High Representative's succession persists into the late 2020s. Pressure for "local ownership," described by an academic, leads to a phased transfer of responsibilities away from the OHR without a constitutional settlement or stronger EU enforcement capacity. Nationalist parties use the transition to entrench control over appointments, public companies and fiscal resources, while external powers cultivate different political centres. Serb, Croat and Bosniak politicians seeking to reconcile communal interests with functioning common institutions and EU integration find compromise less rewarding while obstruction remains politically profitable.

Public mobilisation can disrupt this equilibrium without overturning it. Mass protests in Serbia and Albania show that governments can face sustained opposition over corruption, opaque investment deals, environmental damage and the use of public land and natural resources for large commercial projects. Such movements impose political costs without necessarily severing the external relationships behind those projects. Yet EU engagement continues to run principally through governments, accession institutions and elite-level bargaining, including where protesters demand accountability and rule of law. Misalignment can survive sustained public opposition while genuine reform offers no assured political reward. As an academic observed of controversial strategic projects, "public backlash" persists but "there is no viable alternative to rally around."

Emigration weakens the constituencies capable of sustaining such pressure. Continued migration into European labour markets makes exit easier as confidence in domestic political change declines. One Kosovan researcher described how "prolonged ambiguity transforms it into suspension, fuelling migration aspirations, accelerating brain drain, and embedding waiting room politics among younger cohorts." Remittances cushion household incomes while governments respond to labour shortages through immigration, automation and externally financed investment. If, the researcher continued, "the most reform-oriented segments of the population exit first,"weakening the social base on which long-term convergence depends," emigration and weaker conditionality reinforce one another. Economic integration deepens while the domestic capacity for political convergence erodes.

Where the pathway could diverge

Managed Geopolitical Diversification occupies a narrow space between continued EU-centred integration and Competitive Disorder. It was the most frequently identified baseline among

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both human and synthetic respondents. The macroscenario draws on 26 human responses, including 17 of the 46 baselines, and 23 synthetic responses, including 12 baselines. Neither group places it among its nightmares, while six responses from each appear as wild cards. Synthetic responses cluster more tightly around a managed equilibrium; human experts range further. One academic says “the best case scenario is a concert of powers interacting with a strong local base of actors”, although they assign it very low plausibility. A think-tank analyst specialised in Ukraine describes “fragmented ordering” as EU normative power erodes and external actors penetrate the resulting openings.

EU integration must remain valuable enough to preserve EU structural predominance without determining governments' wider geopolitical choices. A Kosovan researcher expects “the failure to deliver on the EU's most advanced cases [to] trigger a slow-burning legitimacy crisis.” A North Macedonian analyst warns that “the adverse impact will be even more severe if Montenegro and Albania join the EU and the prospects for the other countries remain as limited as they are now.” North Macedonia faces the same risk if the dispute with Bulgaria remains unresolved despite progress on reforms. Failure to admit frontrunners could discredit accession; selective accession could deepen frustration among those left behind. Economic interdependence still sets limits. The analyst expects that “the EU will remain economically strong, given the current level of interdependence in trade and investment that will not significantly reduce on the short to mid-term, but the countries remaining outside will intensify their search for alternatives.” If integration continues to constrain wider geopolitical choices, the trajectory remains closer to Procedural Enlargement. Managed Geopolitical Diversification emerges when governments retain its benefits while gaining greater autonomy over investment, technology, energy and security.

US security capabilities must remain sufficiently available to prevent uncertainty from producing alternative security arrangements. Human experts range from continued burden-sharing to deeper erosion of deterrence. A civil society representative argues that “the security backstop that made EU conditionality credible is disappearing.” Several other experts identify a Russian test of NATO as a possible inflection point. A credible collective response would reduce incentives to construct alternative security arrangements. Failure would give existing doubts about American security commitments operational consequences, encouraging bilateral guarantees, national rearmament and regional security arrangements outside established frameworks.

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External relationships must remain compatible enough to be combined rather than chosen between. A senior economist at a regional bank predicted differentiated outcomes: "In some cases, this may increase flexibility and bargaining power; in others, it risks incoherence and long-term dependency." They identified "the main unintended consequence [as] not instability per se, but the emergence of competing logics of development, governance, and security within the same system." Governments can combine European market integration, Chinese investment, Turkish defence cooperation and American security relationships while their obligations remain confined to particular sectors. Conflicting procurement rules, technological standards, security commitments or political obligations can make them mutually constraining. Most responses envisage Chinese investment without corresponding political or security primacy, although one expert warns that "a major Chinese-led infrastructure or digital integration breakthrough […] could lock parts of the region into long-term economic alignment beyond EU frameworks." Other actors can impose similar constraints where technological, commercial or security relationships require incompatible standards or exclusion of rival suppliers. Once these obligations force incompatible choices across several policy domains, diversification begins to fragment the regional order.

Domestic institutions must retain enough capacity to manage diversification. One think-tank analyst warns that "When accession momentum weakens, those institutions risk becoming partially hollowed out, specialised for EU processes but diminishing in their ability to deliver domestic policy outcomes." Bureaucracies could remain proficient at benchmarks and reporting while losing capacity or legitimacy at home. Weaker Russian or Chinese influence would not necessarily reverse this. As a risk management professional put it: "The reduction of Chinese and Russian influence may not automatically strengthen democratic resilience." Local oligarchic networks and political-business alliances can reproduce many of the same effects without powerful external sponsors. Human responses allow more scope for democratic renewal, whereas synthetic responses concentrate more heavily on incumbent adaptation.

Russian weakness can widen the space for diversification; renewed Russian power can narrow it. As a Moldovan country expert argues: "This would not automatically create stability. Instead, it would open space for a more complex regional environment in which the EU, Turkey and, to a lesser extent, China try to fill different parts of the vacuum." Political networks can also adapt to Russian weakness. In Moldova, "pro-Russian forces might struggle if Moscow is weakened, but could rebrand themselves as neutralist or 'multi-vector' actors." A deeper Russian collapse accompanied by stronger European cohesion would reduce the rationale for hedging; renewed Russian coercive capacity could force harder security choices. The scenario requires Russia to

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retain disruptive capacity without recovering enough power to impose more exclusive alignments.

Regional security crises remain compatible with this order only while they can be contained without producing durable alignments. Some experts expect European economic and political incentives to restrain escalation even without imminent accession. An academic specialised in geopolitics argues that "the EU does not have to give Serbia membership to stabilize the region but it has to keep Serbia interested in keeping the region relatively stable." The corollary follows: "Otherwise, Serbia may just turn to stirring it up for domestic political reasons." A crisis in Kosovo or Bosnia and Herzegovina that forces governments to choose security patrons, creates durable counter-coalitions or produces territorial faits accomplis would push the region towards Competitive Disorder.

Diversification must be sufficiently widespread to constitute a regional pattern. Synthetic responses tend to reproduce a common architecture across the neighbourhood, whereas human experts envisage greater national differentiation. Serbia has unusually developed multi-vector relationships; North Macedonia may diversify as bilateral blockage erodes confidence in accession; Moldova can become more firmly European while adding other regional relationships. The portfolios need not look alike, but enough governments must combine deep EU integration with consequential external relationships for diversification to shape the regional order. Otherwise, the macroscenario dissolves into distinct national adaptations.

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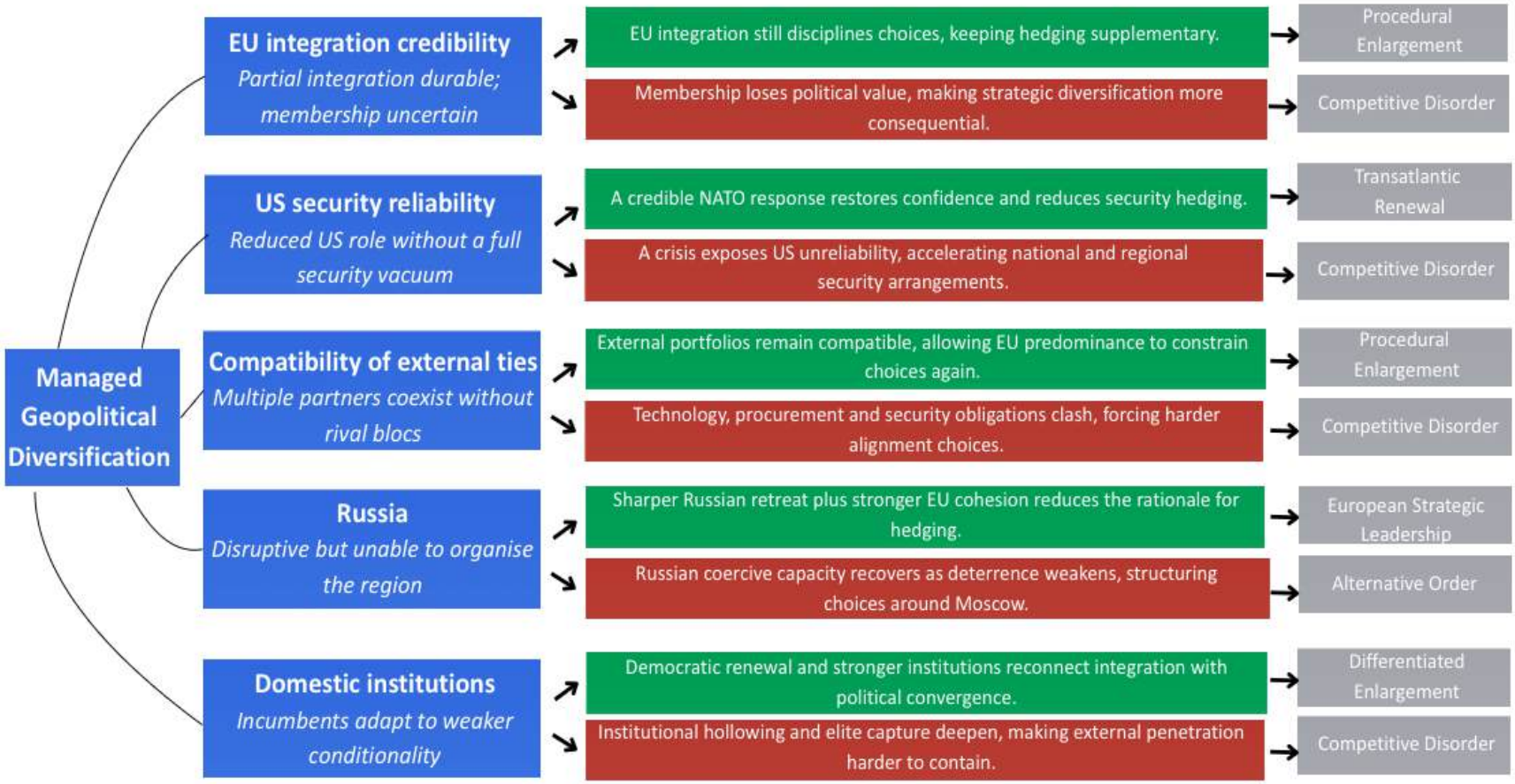
Figure 7: Divergence Tree (Managed Geopolitical Diversification)



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MACROSCENARIO 3 | Differentiated Enlargement

Scenario type: Alternative baseline
Plausibility: Medium
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	***Proactive Order-Setter***	*Restrained Strategist*	*Technocratic Order-Setter*	*Declining Stakeholder*
United States	*Regional Security Architect*	***Strategic Retrenchment***	*Distracted Security Leader*	*Chaotic Withdrawal*
China	*Regional Order-Shaper*	***Selective Economic Engagement***	*Overextended Expansion*	*Residual Engagement*
Russia	*Consolidated Expansionist*	***Strategic Retrenchment***	*Unstable Expansionist*	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	***Calibrated Regional Power***	*Overreaching Broker*	*Regional Retreat*

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Snapshot: 2031

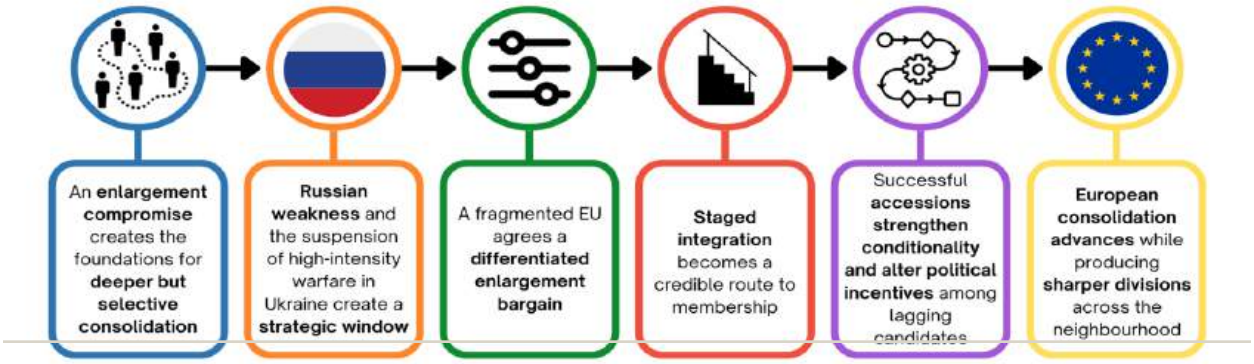
By 2031, enlargement has recovered something it had lost: consequences. The EU has not rediscovered a grand strategy. Instead, member states have found a way to translate broad support for enlargement into decisions on individual candidates. They no longer need the whole neighbourhood to advance at a comparable pace, or every difficult case to be resolved before progress elsewhere. Markets, funding and institutions open in stages; membership follows where reforms, bilateral disputes and member-state consent align. Montenegro and Moldova have joined, Albania is approaching accession, and Ukraine is already woven through European defence, industry, energy and markets. Differentiation has allowed enlargement to move before Europe has settled what its final shape should be.

That changes the atmosphere beyond the frontrunners. Serbia can still balance among Europe, Russia and China, but the calculation looks different when neighbouring countries are actually entering the EU. In North Macedonia, years of exclusion help propel a new pro-European political movement even though the Bulgarian dispute still blocks accession. Bosnia and Herzegovina and Kosovo remain stuck on problems that better incentives cannot solve. Georgia feels the effect more violently. As other candidates advance, the gulf between a society still looking towards Europe and a government resisting the conditions of accession becomes harder to contain.

But this is not a strategically consolidated Europe. The EU has found a way to make enlargement politically workable without resolving its deeper disagreements over security and regional power. The USA has relinquished much of its political leadership while retaining a selective security backstop, leaving Europeans and Türkiye to fill the gaps. Russia remains dangerous but constrained; China remains economically relevant. Europe can now decide more credibly who gets in. It still cannot determine everything that happens around them.

By 2031, the queue is moving again, but not in unison. For the first time in years, moving forward and standing still lead somewhere visibly different.

The scenario's causal logic



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Pathway to 2031

In 2026, enlargement is neither blocked nor on a clear path to completion. European governments remain divided, integration advances faster than accession, and candidate governments exploit the space between alignment and membership. The USA accelerates its strategic retrenchment from Europe while retaining selected military, intelligence and financial instruments. In 2027–28, Russia, constrained by the costs of the war, accepts a suspension of high-intensity warfare in Ukraine and uses the pause to rebuild its capabilities. Retrenchment limits its capacity for further expansion without ending its adversarial posture or willingness to exploit vulnerabilities among neighbouring states. Ukraine uses the opening to deepen its European integration. Montenegro approaches the end of its accession process, while Moldova and Albania advance far enough that another failure to deliver would damage enlargement credibility. As a Montenegrin senior policymaker puts it, the neighbourhood becomes "increasingly differentiated rather than advancing as a single enlargement group."

Political fragmentation among EU member states produces sufficient agreement for selective enlargement. Elections between 2027 and 2029 strengthen nationalist and sovereigntist forces in several member states without producing a coherent anti-enlargement bloc. Years of cyberattacks, sabotage and political interference have entrenched perceptions of Russia as an adversary. Governments seeking stronger European geopolitical influence favour credible rewards for candidates that align and reform. Those wary of the fiscal and institutional consequences accept differentiation because it avoids simultaneous expansion across the neighbourhood. Selective enlargement accommodates both positions, allowing the EU to act as a proactive order-setter despite continued political divisions among its members. As a Moldovan county expert describes it, the neighbourhood moves "from an open-ended accession process towards a more credible and differentiated enlargement framework," preserving conditionality while offering "clearer timelines, staged benefits and, for the most advanced candidates, a realistic path to membership."

The 2028–34 MFF establishes a clearer relationship between intermediate integration and eventual membership. Pre-accession and Ukraine-related resources increase, while transitional arrangements limit the immediate budgetary and institutional costs of enlargement. Growth Plan-style reform facilities, staged Single Market access, participation in EU programmes and agencies, energy integration and infrastructure funding become more closely tied to performance. What a senior economist at a regional bank calls "partial integration (single market access, agencies, funding)" is increasingly front-loaded, while sensitive rights and

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financial transfers are phased in closer to membership. Advancing candidates also adopt EU procurement, competition, subsidy and economic-security rules, restricting Chinese involvement in sensitive infrastructure, technology and strategic industries. States further from membership retain greater latitude.

Security integration develops less evenly. The UK and Norway participate more closely in European defence and industrial cooperation, while Türkiye assumes a greater regional security role as American engagement recedes. As the bank economist warns, “the uneven reliability of U.S. security guarantees creates a gap between political-economic convergence and hard security assurances.” Continued American capabilities, stronger European security provision and Türkiye's expanding role prevent that gap from undermining the enlargement process.

Ukraine takes intermediate integration further than any other candidate. It rejects permanent intermediate status but accepts transitional arrangements that preserve full membership as the endpoint while delivering substantial integration beforehand. Reconstruction finance, defence procurement, industrial cooperation, energy integration and deeper market access bind Ukraine more closely to Europe. Ukraine contributes military experience, defence technology and hybrid-security expertise, while its strategic weight gives it greater influence over the terms of integration than smaller candidates possess. An academic specialised in defence policy envisages a settlement under which “Ukraine could advance toward EU membership while remaining outside NATO structures.” Full accession by 2031 remains difficult, but economic and security integration extends well beyond conventional candidate status.

The first accessions restore credibility to EU conditionality. Montenegro joins around 2029–30 after completing negotiations. Moldova follows, helped by sustained reform, relatively small absorption costs and its importance to Ukraine's western flank, potentially “with limitations, transition periods or temporary safeguards in selected policy areas,” as the Moldovan country expert put it. Another expert argues that a first wave of accession or binding interim integration, “if delivered, it locks expectations and disciplines reforms.” Albania continues to advance, with proximity to membership bringing closer scrutiny of rule-of-law performance and entrenched political-economic networks. Credibility still depends on the EU delivering promised rewards: one expert identifies “reform fatigue if EU rewards slip” as a continuing vulnerability.

Progress among the frontrunners widens the gap with candidates that remain stuck. Experts envisage what one Moldovan geopolitical risk analyst describes as “a deepening bifurcation between front-runners (Montenegro, Albania, Moldova, Ukraine) advancing through cluster

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openings, and structurally stuck cases (Bosnia, Serbia, Georgia under captured leadership) where conditionality alone cannot generate domestic momentum." EU political attention, resources and opportunities increasingly concentrate on candidates able to advance. The analyst cautioned that "hierarchical ordering can produce its own zones of incoherence."

For Serbia, differentiation raises the costs of geopolitical balancing. Political pressure for change remains high after the October 2026 election, but the scenario does not depend on its outcome. Serbia retains considerable leverage through its economic weight, regional influence, industrial base and critical raw materials, and political turnover would not immediately dismantle existing political and economic networks. By 2029–30, Montenegro's membership and Albania's progress make the costs of Serbia's position more visible. Relations with Russia and China, the unresolved relationship with Kosovo and democratic shortcomings restrict access to benefits increasingly available to neighbouring candidates. Businesses, voters and political movements can compare Serbia's position with states moving closer to membership. Balancing becomes progressively harder to reconcile with deeper European integration.

North Macedonia exposes a different weakness in differentiated enlargement: candidate performance does not always determine advancement. As Montenegro, Albania and Moldova move ahead, continued stagnation becomes harder to attribute to the general pace of enlargement. A new pro-European grassroots movement gains support by arguing that nationalist politics and weak reform have allowed newer candidates to overtake the country, increasing pressure on VMRO-DPMNE and potentially reshaping the party system. Yet political change cannot itself resolve the Bulgarian dispute. Continued blockage of a reforming North Macedonia would shift pressure towards the EU and Bulgaria and weaken the credibility of performance-based differentiation. Conditionality loses force when governments cannot obtain the promised reward through actions substantially within their control.

In Georgia, stronger conditionality collides with the government's interest in preserving domestic control. Moldova's accession and Ukraine's incorporation into European structures make Georgia's divergence harder to present as temporary. Georgian Dream resists conditions that threaten its domestic position, while large sections of society attribute exclusion from the advancing European group to government choices. The EU restricts benefits and attaches greater costs to non-compliance. Russia is not an alternative partner but retains substantial coercive and political leverage over Georgia, raising the costs of geopolitical reorientation and giving the government greater room to resist European pressure. Mobilisation and repression intensify, potentially producing sustained political violence and deeper confrontation with the

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EU. One expert describes the wider risk: “Proactive enlargement naturally invests political capital where it pays off […] and deepens the marginalisation of structurally stuck cases like Bosnia, Serbia, Georgia under captured leadership, which then drift into hedging with Russia, China and the Gulf.”

Bosnia and Herzegovina and Kosovo expose the limits of accession conditionality. Bosnia remains constrained by its fragmented constitutional order. A more proactive EU imposes greater costs on political obstruction and destabilising behaviour, but accession incentives cannot resolve the conflicts embedded in the Dayton system. Serbia's stronger incentives to discourage destabilising moves in Bosnia reduce one source of external support for escalation without making Republika Srpska's behaviour dependent on Belgrade. Kosovo gains greater access to European markets, programmes and security cooperation, while the rising costs of Serbia's stagnation strengthen incentives for incremental normalisation. These measures reduce practical barriers but cannot resolve Kosovo's non-recognition by Serbia and five EU member states. Security guarantees and crisis-management mechanisms contain the risks surrounding both cases. Where advancement depends on political settlements among several actors, stronger conditionality towards individual candidate governments reaches its limit.

Where the pathway could diverge

The expert responses diverge over whether differentiated enlargement would produce a durable EU-centred regional order. Eleven human experts outlined a baseline or preferred scenario in which the EU allows “frontrunners” to advance faster than “laggards” constrained by weak reform, captured institutions, bilateral disputes or unresolved conflicts. Only one synthetic response produced this type of scenario, emphasising administrative capacity, reliable financing and implementation. Several human experts envisage an order in which “the EU's regulatory, financial and security architectures become the only credible offer on the table,” as a Moldovan geopolitical risk analyst describes it. The main uncertainties concern whether the EU can deliver membership, whether accession by the first entrants changes incentives elsewhere, and whether the external conditions supporting differentiation endure.

The pathway breaks down if candidates meet the requirements and the EU still cannot deliver membership. Montenegro's accession, followed by Moldova and continued Albanian progress, is supposed to restore the connection between reform and reward. EU institutional reform, the MFF, recalibration of the Common Agricultural Policy and parliamentary redistribution could instead leave “candidates ‘ready’ but the EU ‘not ready’” and produce “broken expectation

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cycles." A Western Balkan academic is starker: "If Montenegro and Albania meet all the conditions but the EU's member states block the process, this would be 'the end of enlargement as we know it'." Candidate governments can also fail to convert opportunity into reform, producing "compliance without transformation." If membership recedes while staged integration continues, intermediate integration becomes a durable condition rather than a route to accession, moving the pathway towards Procedural Enlargement.

Accession by the first entrants may do little to change incentives among candidates left behind. One expert envisages "Montenegro's accession in 2029 provid[ing] the EU with a symbolic success but fail[ing] to generate renewed momentum for enlargement." Bosnia and Herzegovina's constitutional structure, North Macedonia's bilateral blockage, Kosovo's non-recognition and captured institutions elsewhere cannot be resolved through demonstration effects alone. Serbia is particularly consequential. Experts identify "Serbia post-Vucic" among the region's "important unknowns," ranging from greater EU engagement with democratic forces to a "nationalist return in Serbia after Vucic" and "a greater rapprochement with Russia." Concentrating EU attention on advancing candidates could meanwhile "deepen[] the marginalisation of structurally stuck cases like Bosnia, Serbia, Georgia under captured leadership, which then drift into hedging with Russia, China and the Gulf." If such relationships begin to support choices no longer anchored primarily in the EU, differentiation moves towards Managed Geopolitical Diversification.

The scenario depends on Russia remaining constrained without ceasing to be a strategic threat. One expert argues that "a reduced Russian threat could weaken the political urgency behind Ukraine's accession." A deeper Russian retreat could therefore weaken one source of EU agreement around enlargement, while a recovery of Russian capabilities would increase pressure on vulnerable candidates and test European deterrence. Either movement would unsettle the balance underpinning differentiated enlargement.

American retrenchment remains compatible with the pathway only while Europe and other regional actors can contain the resulting security gaps. One Western Balkan think-tank analyst expects that "US post Trump is not as destabilising an actor, but fails to rebuild the bridges burned." This reduced but continuing American role is consistent with the scenario. A sharper retreat would be harder to absorb. A senior economist at a regional bank speculated that a crisis met by "a hesitant U.S. response would accelerate EU strategic autonomy and deepen reliance on Türkiye in security-adjacent domains." Greater European and Turkish provision could compensate for a reduced American role; failure to do so would leave deepening EU political

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and economic integration resting on a weaker security architecture. Recurrent crises, renewed Russian pressure or a sharper reduction in American capabilities could then move the neighbourhood towards Competitive Disorder.

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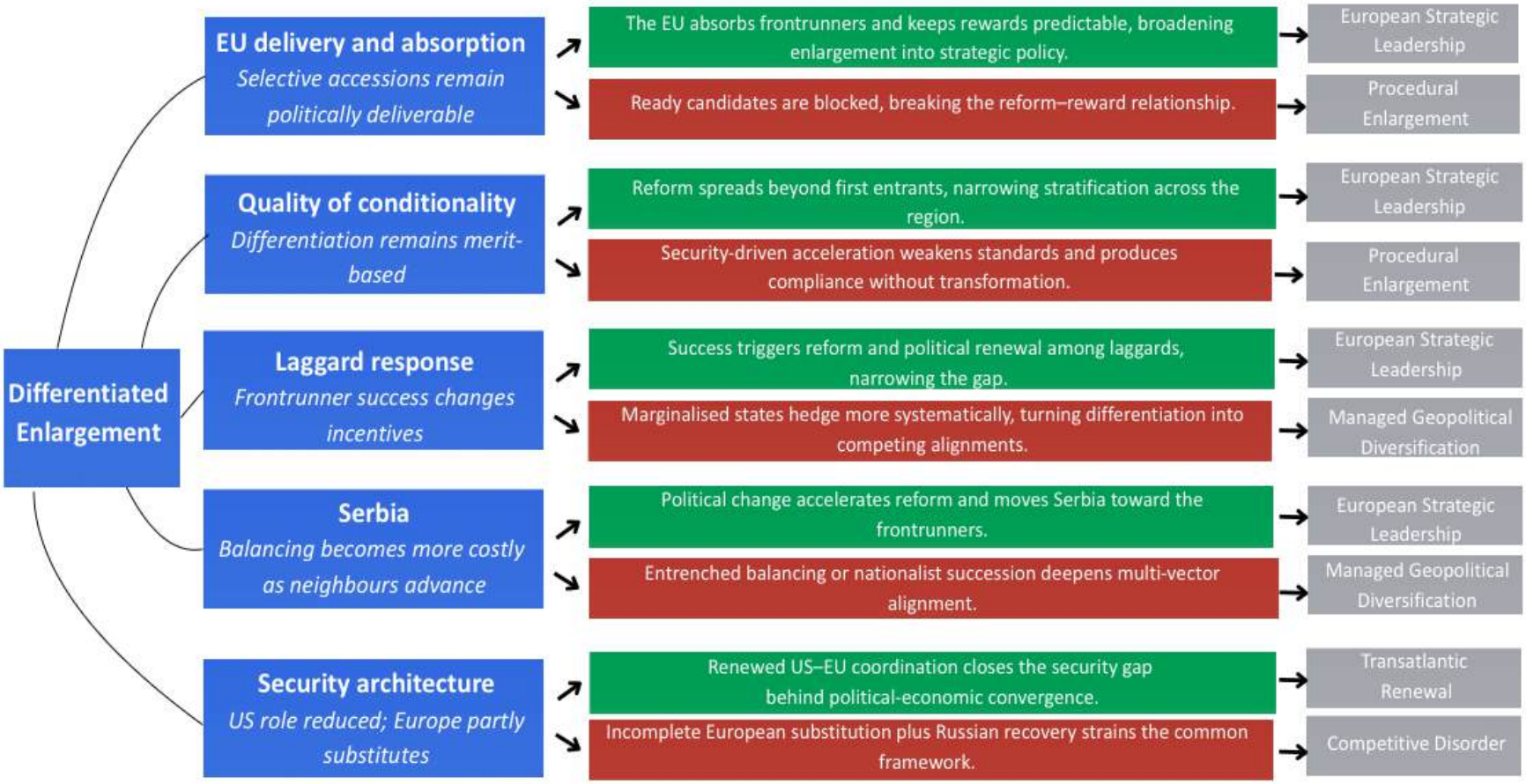
Figure 8: Divergence Tree (Differentiated Enlargement)



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MACROSCENARIO 4 | Transatlantic Renewal

Scenario type: Preferred
Plausibility: Low
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	***Proactive Order-Setter***	*Restrained Strategist*	*Technocratic Order-Setter*	*Declining Stakeholder*
United States	***Regional Security Architect***	*Strategic Retrenchment*	*Distracted Security Leader*	*Chaotic Withdrawal*
China	*Regional Order-Shaper*	***Selective Economic Engagement***	*Overextended Expansion*	*Residual Engagement*
Russia	*Consolidated Expansionist*	***Strategic Retrenchment***	*Unstable Expansionist*	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	***Calibrated Regional Power***	*Overreaching Broker*	*Regional Retreat*

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Snapshot: 2031

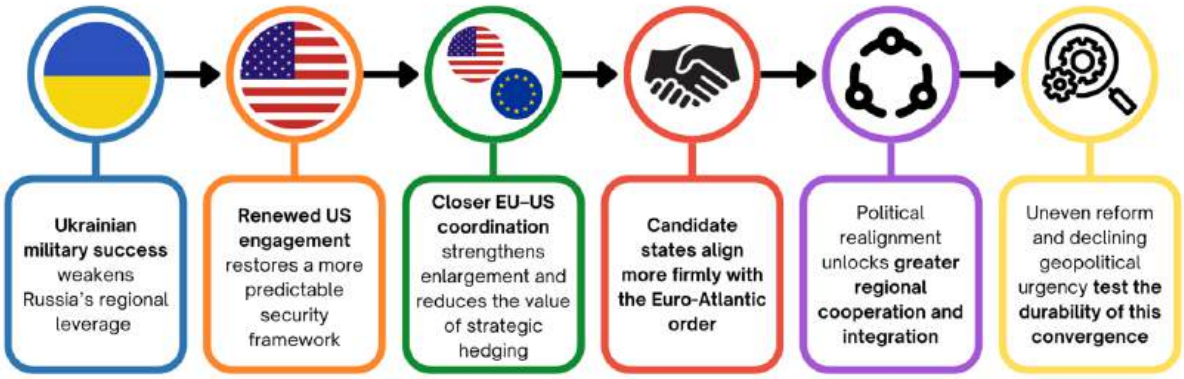
The Americans are back, and for the first time in years the EU and USA are pulling broadly in the same direction. US weapons, intelligence, sanctions and diplomacy reinforce an enlargement process driven by European money, regulation and institutions. The partnership works, but nobody mistakes it for a return to the old transatlantic relationship. European allies keep building their own military capacity. Candidate governments know that another US election could change the equation again.

Russia has lost the war and Vladimir Putin is gone. What replaced him is not democratic or benign. A new authoritarian leadership is trying to steady a bruised state, contain tensions at home and decide which positions abroad it can still afford to defend. Russian troops remain in Abkhazia and South Ossetia; intelligence networks and political connections survive elsewhere. But Russia can no longer protect every client or subsidise every dependency. In Moldova, that weakness has opened the way to a difficult reintegration of Transnistria. Ukraine is rebuilding while emerging from the war as a formidable security actor in its own right.

For the candidate states, renewed EU-US cooperation has made previously stuck problems move. Montenegro is inside the EU. Albania is close. Ukraine and Moldova are advancing. Serbia faces pressure from two partners it could once play against one another. None of this is tidy: democratisation can make old disputes louder, accession leaves some countries behind, and Russia's retreat creates problems of its own.

The neighbourhood in 2031 is not settled. But the strategic weather has changed: American power is again reinforcing European integration instead of cutting across it.

The scenario's causal logic



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Pathway to 2031

European defence coordination begins to recover before the USA changes course. By 2028, the transatlantic rupture has changed defence planning among European NATO members. Military spending has risen, ammunition and air-defence production has expanded, and EU instruments support joint procurement and industrial capacity. Governments prepare for another period of reduced American support. The 2028 US presidential election brings an administration that recommits to NATO, restores military and intelligence coordination and renews substantial support for Ukraine. It also tries to rebuild diplomatic and development machinery dismantled under its predecessor. USAID programmes and support for regional institutions resume, but lost personnel, expertise and implementing networks cannot simply be recreated. European governments restore cooperation because they still need American capabilities, while retaining the defence investments built during the rupture. Two Trump victories have established another reversal in US policy as a recurring strategic risk.

The division of responsibilities within the alliance has changed. European NATO members carry more responsibility for conventional deterrence, territorial defence and support to Ukraine. The USA again provides nuclear deterrence, intelligence, strategic lift and other capabilities its allies cannot readily replace. In one expert's formulation, external roles become “complementary rather than substitutional”: the EU supplies the institutional framework through enlargement and regulation, while American military, intelligence and financial power reinforces it. As a North Macedonian analyst envisages it, the US “actively pushes the EU to integrate the 9 countries as the only security commitment that the EU can actually deliver upon.” An EU veto can still block common financing or accession decisions, but not NATO planning, bilateral military assistance, US sanctions or intelligence cooperation.

Renewed American support makes a strategy of outlasting Ukraine's external backers less viable for Russia. Restored deliveries of air-defence interceptors, long-range munitions and other capabilities combine with expanded production among European allies and Ukraine's defence industry. The US administration presses for negotiations while rejecting an overhead settlement with Russia and opposing Ukrainian war aims it considers likely to trigger direct escalation. Large-scale hostilities end around the turn of the decade with Ukrainian sovereignty intact but some territorial questions, including Crimea, unresolved. Elections follow the end of

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martial law, while EU and US financing ties reconstruction to anti-corruption measures and institutional reform.

Defeat in Ukraine shifts the Russian leadership towards domestic stabilisation and a narrower set of external priorities. Military losses, economic pressure and elite conflict eventually remove Vladimir Putin, but not the authoritarian system built around him. His successors establish a new elite settlement and reassert control over potentially unstable regions, including Chechnya and the North Caucasus. With fewer resources for patronage abroad, Russia concentrates on positions where geography and existing deployments provide leverage, reinforcing its forces and military infrastructure in Abkhazia and South Ossetia. Ukraine shares wartime expertise on Russian cyber operations, sanctions evasion, covert finance and political interference with Moldova and other candidate states. These activities continue but have less effect where accession advances and renewed EU-US coordination increase confidence in the prevailing trajectory.

In Moldova, Russian support can no longer sustain the Transnistrian status quo on the same terms. Tighter sanctions make financial transfers and energy subsidies harder to maintain, while the Transnistrian economy depends increasingly on Moldovan and EU markets. Russia responds by interrupting or conditioning pension supplements, financial transfers and subsidised energy on resistance to agreements with the Moldovan government, forcing the Transnistrian elite to weigh Russian patronage against its commercial interests. Renewed US diplomacy adds weight to the settlement process. Aa Moldovan analyst argues, “a Tiraspol elite without Moscow backing has no sustainable position,” allowing a phased reintegration framework involving security guarantees, minority rights and gradual administrative integration to move “from theoretical to operational.”

Ukraine's post-war reconstruction operates simultaneously as an accession process and an investment programme. EU financing and accession requirements shape the regulatory framework, while US firms, finance and technology compete for reconstruction contracts. War-risk mechanisms draw private capital into infrastructure and industry. Ukraine enters EU electricity and transport networks and becomes more closely integrated into European defence procurement and industrial supply chains while reforming procurement, courts and public administration. Governance requirements delay some projects; access to reconstruction finance accelerates other reforms.

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Russian energy holdings face coordinated US and EU pressure. The restructuring of Russian ownership in Serbia's NIS becomes a precedent as sanctions turn next to Zarubezhneft's holdings in Republika Srpska, including Nestro Petrol and the Brod and Modrča refineries, pushing them towards divestment or restructuring. Moldova's integration with Romanian electricity and gas networks makes renewed Gazprom dependence increasingly difficult. US LNG expands alongside nuclear-fuel diversification and Ukrainian energy reconstruction, while Türkiye and Azerbaijan gain from additional Southern Gas Corridor capacity. An academic specialised in defence policy and Ukraine envisages the US becoming "a pragmatic partner to the EU in exchange for extensive energy infrastructure investments that make decoupling from Russia possible."

Repeated changes in US policy increase the value candidate governments attach to China's predictability. They restrict Chinese participation in telecommunications, cloud and data infrastructure, AI systems and other sensitive technologies where American intelligence or defence cooperation is at stake, but resist wider decoupling. Chinese finance, industry and technology remain attractive where EU or US firms cannot offer equivalent terms, including parts of Ukrainian reconstruction. As a Kosovan academic warns, "it is unlikely that European businesses would have the capacity and willingness to step into the shoes of Chinese counterparts." EU-US differences over AI, data governance and technological security also complicate demands for Chinese exclusion.

Renewed US engagement reduces European reliance on Turkish security capabilities but increases the significance of Türkiye's connectivity projects. Post-war trade raises the importance of the Middle Corridor, with rail, logistics and energy connections linking Türkiye and the South Caucasus more closely to EU markets. Candidate governments can negotiate over routes, financing and local participation without treating Turkish investment as an alternative to EU integration. A Georgian policy expert describes the corridor as a potential "genuine game-changer" while Turkish overreach gives participating states scope to "co-constitute the programme with Turkiye."

Enlargement accelerates as some geopolitical constraints recede. Montenegro enters the EU in 2029, while Albania joins or reaches the final stage by 2031. Moldova advances as Transnistrian reintegration proceeds, while Ukraine's reconstruction ties accession reforms to EU financing and regulation. Kosovo benefits from renewed American pressure for normalisation but remains constrained by non-recognition from five EU members. North Macedonia remains blocked unless its dispute with Bulgaria is resolved; Bosnia and Herzegovina by constitutional and

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governance problems. EU budget negotiations begin adapting agricultural and cohesion spending to accommodate poorer new members. US security cooperation can still reward governments whose domestic practices impede EU accession, failing to address the danger that stability is "prioritized over democratic depth," as an Albanian risk management professional put it.

Serbia tests whether stronger EU-US coordination changes domestic incentives as well as foreign policy. EU investment in critical raw materials is tied to stricter environmental standards, local revenue-sharing and contract transparency, challenging networks through which mining and infrastructure projects have reinforced central political control. US sanctions and financial scrutiny increase the cost of Russian-linked networks. If the SNS-centred system survives the crises of the mid-to-late 2020s, repression intensifies at home while the government becomes more accommodating abroad, implementing practical agreements with Kosovo, distancing itself from Republika Srpska escalations and reducing exposure to Russian political networks. A successor government faces similar external constraints but receives greater EU support for breaking with entrenched networks. Progress with Kosovo increasingly depends on domestic constituencies capable of sustaining practical agreements rather than another externally brokered elite settlement.

Georgia follows a different trajectory. As Moldova and Ukraine advance towards the EU, Georgian Dream uses Russia's reinforced military position in Abkhazia and South Ossetia to defend restrictions on opposition and civil society and portray renewed confrontation with Russia as the likely consequence of reversing its foreign-policy course. Its opponents present Russian defeat and accession progress elsewhere as an opportunity Georgia is losing. EU sanctions and suspended benefits raise the cost of government policy, while Russian pressure raises the perceived cost of changing it. Accession progress elsewhere therefore intensifies the domestic contest over Georgia's geopolitical alignment.

Accelerated integration and accession strain administrative capacity. Governments must transpose legislation, reform courts, improve procurement and absorb investment simultaneously. The resulting "compressed transformation" produces institutional change alongside sophisticated box-ticking, with formal compliance sometimes moving faster than implementation. New members can also bring bilateral disputes into the accession process. As a representative of an international organisation warns, "once countries start joining the EU there could be tensions with those which are excluded."

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By 2031, the political urgency behind renewed transatlantic cooperation is weakening. The end of large-scale fighting reduces support for exceptional defence spending, reconstruction assistance and accelerated enlargement. A Moldovan geopolitical risk analyst warns of "premature peace-dividend politics inside the EU," as governments return to "fiscal consolidation and agricultural lobbying." With the 2032 US election approaching, candidate governments seek to secure accession advances, security arrangements and investment commitments before another reversal in US policy can test the new arrangements.

Where the pathway could diverge

Human experts were more sceptical of this macroscenario than their preferences alone suggest. Transatlantic Renewal was preferred by 25 of 46 human experts and 36 of 45 synthetic experts, yet human respondents generally assigned it low plausibility. Synthetic responses more readily envisage renewed US engagement, greater European capacity, Russian weakening, enlargement and domestic reform reinforcing one another. Human experts identify complications within these developments themselves. American re-engagement can slow European capability-building; Russian retreat can become disorderly; accession can create new divisions; democratisation can complicate geopolitical bargaining; and stronger EU-US pressure can provoke resistance as well as compliance. Favourable developments do not necessarily reinforce one another, and some can generate new vulnerabilities.

Much depends on the 2028 US election and the character of any subsequent re-engagement. A Democratic administration could attempt a broad restoration of alliance relationships and institutions; a more conventional Republican administration could restore security cooperation while demanding greater burden-sharing; continued MAGA control could preserve much of the rupture. Even under the first two outcomes, the previous relationship is unlikely to be restored intact. An academic specialised in security expects that "even a Democratic President would outline intended US repositioning towards the Middle East and China." EU-US disagreements could also return over sanctions, enlargement and regional settlements. A Western Balkan think-tank analyst warns that "any renewed divergence between the EU and the US could quickly reopen space for external actors and domestic opportunism."

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Russian defeat need not produce strategic retrenchment. A weakened Russia could still sustain intelligence relationships, cyber operations, covert finance and local political networks at relatively low cost. An academic specialised in security and arms trafficking warns that a "chaotic withdrawal" could have "destabilising impacts" through "arms leakage, organised crime and non-state actor groups, and hybrid operations." Human responses span strategic retrenchment, unstable expansionism, chaotic withdrawal and state crisis. As another expert cautions, "regime collapse does not produce orderly retreat." Transatlantic Renewal requires Russia to lose the capacity to sustain several external commitments simultaneously while retaining sufficient central control to stabilise domestically and concentrate resources on selected positions abroad. Successful retrenchment carries a different risk. Reduced threat perceptions could produce, as the aforementioned academic put it, "an end to European capability-building, leaving the EU exposed to the next electoral swing." Another expert similarly warns of "premature peace-dividend politics inside the EU" as governments return to "fiscal consolidation and agricultural lobbying." Renewed Russian gains, faster military recovery or another reversal in US policy would then confront European allies after the urgency behind their defence expansion had receded.

Enlargement must produce membership, not another intermediate stage of integration. Human experts disagree over whether political will is sufficient or whether progress also requires changes to budget arrangements, veto practices and safeguards against bilateral blockage. Montenegro, Albania and Moldova matter beyond their individual trajectories because accession by one or more would demonstrate that membership remains attainable. As a North Macedonian think-tank analyst argues, the EU must "set and implement enlargement as a strategic objective beyond rhetoric." If qualified candidates receive funding, market access and regulatory integration but remain indefinitely outside, the result moves towards Procedural Enlargement. Early accessions carry their own risk: they could reduce pressure to resolve the harder cases, while new members gain opportunities to import bilateral disputes into subsequent accession negotiations. As a representative of an international organisation warns, "once countries start joining the EU there could be tensions with those which are excluded."

Stronger EU-US coordination does not guarantee domestic political convergence. Human experts envisage democratic openings, but also elite adaptation, selective compliance and nationalist counter-mobilisation. The academic specialised in security stresses the "messiness of democratisation": a post-Vučić Serbia "may well hold a principled position against Kosovo's independence," while a "genuinely-democratic Belgrade-Prishtina dialogue will be noisier than an imposed one." A stronger EU could respond to nationalism or radicalisation through

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“principled withholding of funds or rewards” rather than reverting to stabilitocracy. Other responses identify different risks. An Albanian risk management professional cautions that “some Western Balkan governments may adopt outwardly pro-European policies while maintaining hybrid governance practices domestically,” while a Western Balkan academic warns that marginalised “pro-sovereignty camps” may “attempt to escalate in order to regain influence over the domestic political scene.” In Georgia, Georgian Dream can similarly portray EU and US pressure as increasing the risk of confrontation with Russia while Russian forces remain in Abkhazia and South Ossetia. The macroscenario does not require domestic political consensus, but it does assume that democratic contestation and nationalist mobilisation do not derail the broader geopolitical shift.

Chinese and Turkish engagement remains compatible with this macroscenario only while candidate governments can reconcile it with EU and US requirements. Chinese investment and Türkiye's connectivity projects need not obstruct EU accession or American security cooperation. That changes if Chinese involvement conflicts with US intelligence or technological-security requirements, Turkish initiatives carry conditions incompatible with EU or US commitments, or alternative finance enables governments to evade accession requirements. These relationships would then move towards Managed Geopolitical Diversification, or Competitive Disorder if incompatible commitments accumulate across several domains.

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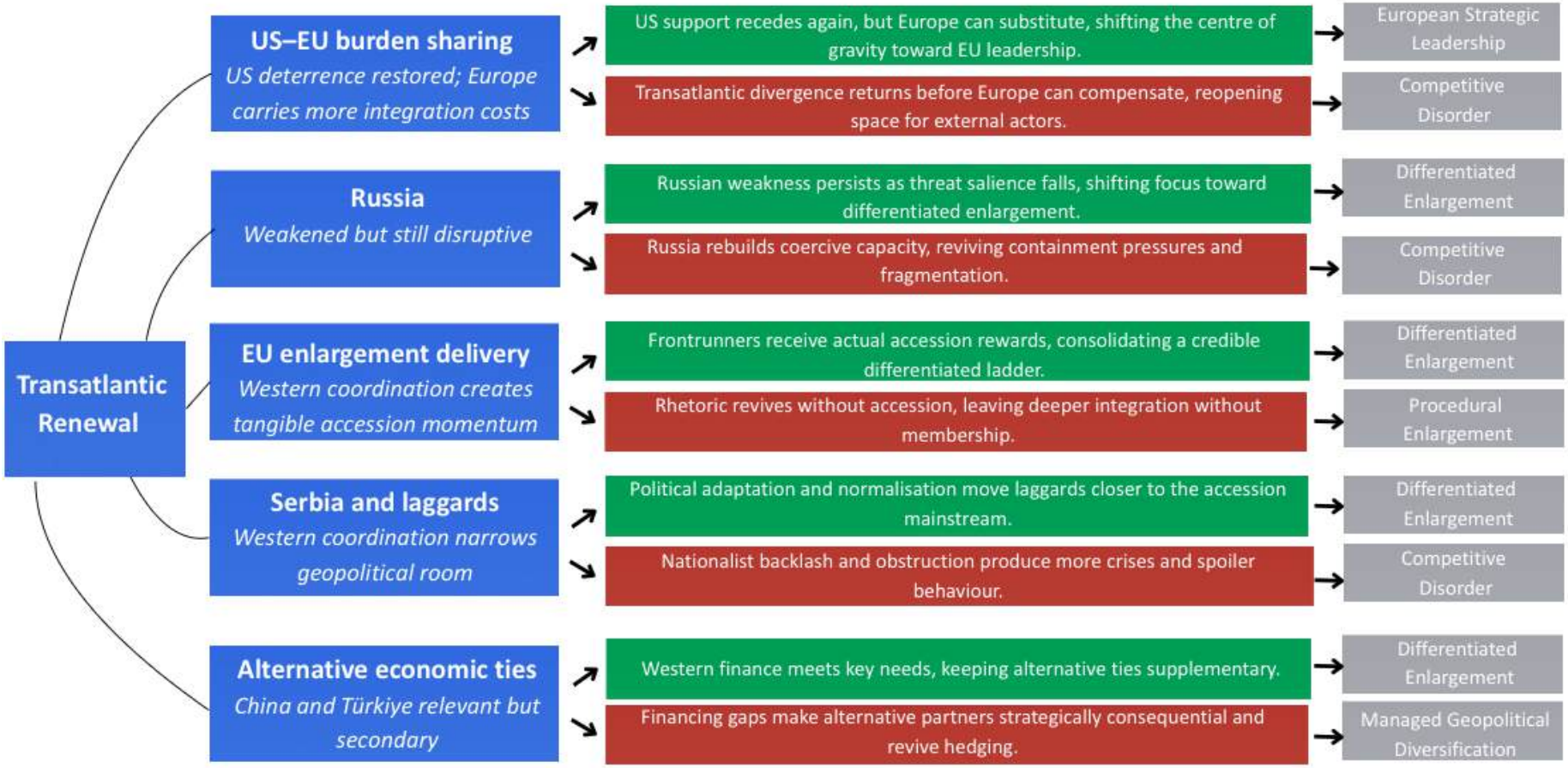
Figure 9: Divergence Tree (Transatlantic Renewal)



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MACROSCENARIO 5 | European Strategic Leadership

Scenario type: Preferred / wild card
Plausibility: Low-medium
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	***Proactive Order-Setter***	*Restrained Strategist*	*Technocratic Order-Setter*	*Declining Stakeholder*
United States	*Regional Security Architect*	*Strategic Retrenchment*	*Distracted Security Leader*	***Chaotic Withdrawal***
China	*Regional Order-Shaper*	***Selective Economic Engagement***	*Overextended Expansion*	*Residual Engagement*
Russia	*Consolidated Expansionist*	*Strategic Retrenchment*	***Unstable Expansionist***	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	***Calibrated Regional Power***	*Overreaching Broker*	*Regional Retreat*

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Snapshot: 2031

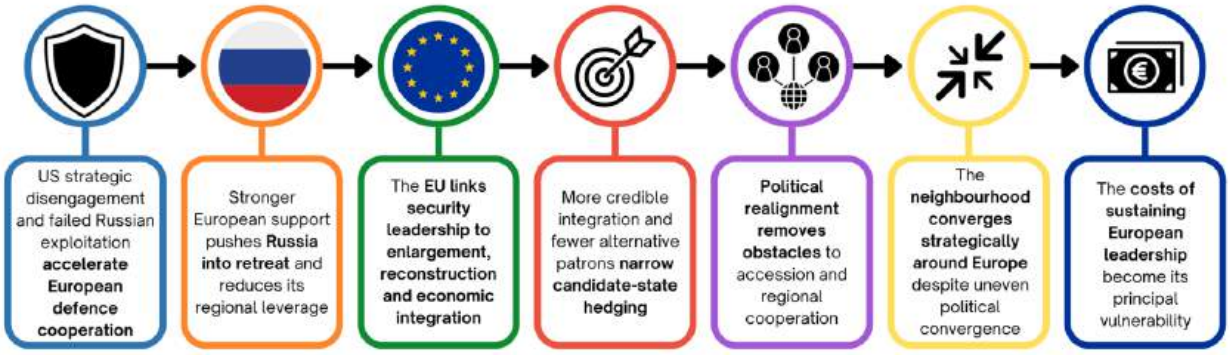
The candidate neighbourhood has become a staging ground for the EU as a geopolitical power. The USA has effectively ended the NATO alliance as it once existed, leaving European members to defend themselves. Russia tried to expose the weakness of that arrangement with a limited attack in the Baltic. Instead, fighting NATO forces while sustaining its war against Ukraine overstretched the Russian military. European forces reversed the Baltic incursion; Ukraine exploited the opening to recover most of the territory occupied since 2022. Russia retains Crimea and its nuclear arsenal. The threat has receded, not disappeared.

The strategic map behind the front has changed with it. Ukrainian factories feed European defence production. Railways built for trade also carry military equipment. New power connections tie Ukraine and Moldova into EU grids. Data centres and AI infrastructure follow reconstruction investment eastwards. Serbian lithium and Ukrainian minerals feed European supply chains. Montenegro, Albania and Moldova are EU members; other candidates enter parts of the Single Market and defence-industrial system before accession.

This is power politics, not democratic convergence. EU governments press Serbia over Kosovo, Bosnia and foreign policy while bargaining with the same political system over lithium and infrastructure. Georgia returns to the accession path without comparable political transformation. China remains an investor and technological partner. Türkiye trades with Russia even as its military, Black Sea and energy relationships make it more important to EU governments.

For decades, the EU tried to transform the candidate neighbourhood through the promise of membership. By 2031, it needs the neighbourhood for military depth, industrial capacity, energy, minerals, infrastructure and labour. Enlargement has consoldiated as part of the material basis of European power. That makes integration more urgent, more transactional and harder to abandon.

The scenario's causal logic



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Pathway to 2031

Between 2026 and 2029, the political obstacles to greater strategic coordination within the EU weaken. Fewer governments are willing to block common foreign and security initiatives, while support for greater responsibility for defence spreads beyond the traditional integrationist centre, including to nationalist governments such as Italy's. Elections in France, Germany and Poland and for the European Parliament preserve this minimum consensus. One Western Balkan academic specialised in the rule of law identifies the "decline of authoritarian and populist disruptors within EU" as the condition that "would allow for both EU reform and enlargement." Migration, climate policy and institutional reform remain divisive.

US disengagement puts this arrangement under immediate pressure. The Trump administration sharply reduces its role as guarantor of European security. NATO survives, but its European members can no longer assume US military support in a crisis. A Serbian academic anticipates the counterintuitive result: "Partial US withdrawal would strengthen European unity, agency and capabilities in the security, but also all other domains." Russia tests this shift already in 2027. After years of sabotage, infrastructure attacks and airspace incursions, Russian forces stage a limited incursion into NATO territory in the Baltic region alongside cyber disruption and electronic warfare. The USA stays out. Expecting hesitation, Russia instead faces Polish, German, Nordic, British, Canadian and other forces, backed by British and French nuclear deterrence. With the war against Ukraine continuing, Russia is rapidly overstretched across two theatres.

Russian overstretch changes the balance in Ukraine. Exploiting the opening, Ukrainian forces regain most or all territory occupied since 2022 as Russia withdraws from exposed positions. The Baltic incursion is reversed, but the participating governments stop once NATO territory is secure rather than test Russia's nuclear deterrent. Russia escapes outright defeat and retains Crimea. European NATO members have nonetheless defended allied territory and sustained Ukraine without US leadership. Joint procurement and defence production accelerate, European coalitions take greater responsibility for deterrence and forward deployment, and EU finance, industrial policy and procurement support NATO's military structures. Russia's remaining conventional forces and nuclear arsenal discourage an immediate post-crisis reduction in defence spending. Ukraine is drawn into defence production and operational cooperation, giving the relationship, in the formulation of a country risk analyst at a private sector consultancy, "a distinct security- and defence-related character."

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Enlargement acquires a more direct security function. The 2028–34 EU budget directs substantially more funding towards Ukraine and the candidate states. Reconstruction and infrastructure spending also serve security objectives: rail and road upgrades support military mobility, energy investment reduces exposure to Russia, and candidate states receive earlier access to parts of the Single Market as they meet accession requirements. As a think-tank analyst specialised in the Eastern Neighbourhood puts it, “enlargement is treated as a strategic priority — not merely a political one — with security implications fully acknowledged and acted upon.” Candidate states also gain access to parts of the EU's defence-industrial architecture before membership. Russia's retreat from southern Ukraine isolates Transnistria. Moldova's accelerating accession and the enclave's dependence on Moldovan and EU markets eventually produce a settlement under Moldovan sovereignty, substantial local autonomy and the progressive removal of Russian troops and military infrastructure. The EU becomes the region's “primary cooperation address,” as a North Macedonian academic puts it.

EU investment places more technological and industrial capacity in the candidate states themselves. AI and cloud investment under the 2026 technological-sovereignty agenda extends beyond EU borders. Existing AI Factory Antennas in Serbia, North Macedonia and Moldova develop into a wider network connecting candidate-state firms, researchers and public administrations to EU compute, while sensitive government data and critical AI systems become subject to stricter requirements on data location, control and supply-chain dependence. New data centres and computing infrastructure are built in candidate states with sufficient grid capacity and skilled labour, with reconstruction spending giving Ukraine particular scope to host them. EU procurement and reconstruction funding support local production in defence, energy equipment, digital infrastructure and associated supply chains. For Ukraine, attracting displaced workers back becomes part of rebuilding the workforce needed to sustain reconstruction and industrial recovery.

The expansion requires electricity, grids, land and critical raw materials. The EU seeks privileged long-term access to Ukrainian resources and Serbian lithium, while investment and exploration expand around untapped deposits in Bosnia and Herzegovina and Kosovo. New Black Sea electricity connections and investment in generation and storage allow Ukraine and Moldova to supply and draw more power through EU networks, while mineral-processing capacity expands closer to extraction sites. Mines, transmission infrastructure, processing facilities and data centres consume land, electricity and water. Candidate governments can make access conditional on local processing and investment, while pressing for EU funding and faster approval of strategically important projects.

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Urgency over resource security can also blunt accession conditionality. The EU has incentives to maintain working relationships with governments controlling strategically important mines, energy infrastructure and transport corridors even where democratic governance or environmental protection deteriorates. Accession requirements remain, but member-state governments have stronger reasons to protect projects important to supply and security. Incumbents can use the jobs and contracts attached to these projects to reinforce patronage networks, while strategic cooperation makes EU governments more reluctant to confront them publicly. China remains important to trade, investment and clean-technology supply chains without becoming the target of general decoupling. Türkiye retains ties with Russia while expanding cooperation with EU members on Black Sea security, energy, connectivity and Ukrainian reconstruction. As a think-tank analyst puts it, the EU can remain “a norm setter for the region” while pursuing pragmatic partnerships beyond its prospective membership space.

Serbia has fewer external partners capable of offsetting EU pressure. Russia's weakening and Türkiye's closer cooperation with EU members make it harder for the Serbian government to use alternative relationships to resist EU demands; China remains economically important but does not replace them politically. Serbia's lithium, industrial base and place in EU-linked technology infrastructure also increase the value of cooperation with its government. EU pressure concentrates on foreign-policy positions, implementation of agreements with Kosovo and Serbian support for destabilising actions in Bosnia and Herzegovina, without necessarily extending equally to domestic reform. The SNS-centred system may fracture under protest and elite pressure, but whether it remains in power or gives way to a heterogeneous successor coalition, Serbia has fewer viable alternatives to closer cooperation with the EU. Reduced political and financial support from the Serbian government raises the cost of renewed secessionist moves by the Republika Srpska leadership. Practical implementation of the 2023 normalisation agreements with Kosovo advances without formal Serbian recognition.

Georgia moves closer to the EU without comparable domestic transformation. Georgian Dream survives the halt in Georgia's accession process and contains a mobilised but fragmented opposition. Russia's weakening, Moldova's accession, Ukraine's progress and expanding Black Sea links leave Georgia more isolated from the trade, infrastructure and security relationships developing around the Black Sea. After 2028, the government concedes enough to reopen a path towards accession without dismantling much of the political system that produced the rupture. By 2031, Montenegro, Albania and Moldova are EU members; Ukraine and North Macedonia are approaching membership; Serbia has moved closer to EU foreign-policy positions; and Georgia has resumed its European trajectory from further behind.

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Where the pathway could diverge

Human experts treated European Strategic Leadership primarily as a preferred future. Fifteen of 46 responses fell within this macroscenario, eleven preferred and four wild cards; none were baselines or nightmares. The 14 synthetic responses were distributed across all four types: five baselines and three each as preferred, nightmare and wild-card futures. Human responses therefore place greater weight on the political changes needed to reach this configuration. As a country risk analyst acknowledges, "[the] trajectory depends on major shifts within the EU as well as larger security challenges, but these can also be linked." US disengagement must prompt European action before opening a security gap, while Russian pressure must reinforce cohesion before Russia can exploit the transition.

The interval between US disengagement and an effective European response is the principal security risk. NATO can remain the framework for collective defence, but forces, procurement and political decisions have to adjust quickly enough to compensate for reduced US military involvement. A Serbian academic warns that "full or partial withdrawal from NATO and the broader transatlantic strategic alignment might embolden Russia to seek further gains in Europe, seeing it as a window of opportunity." A Western Balkan researcher envisages NATO fracturing, with "a European part of the North Atlantic Alliance" emerging around a significant Turkish role and candidate states dividing between European and American blocs. A Bosnian academic expects the USA to remain "a supportive and friendly power" without returning to its pre-Trump security role. If European governments respond only after a deterrence failure, the transition could produce a different regional order before new capabilities are ready.

Russia must lose enough military capacity to curtail its regional role without collapsing. A Ukrainian think-tank analyst describes Russian strategic retrenchment as "almost fantastic[al] as of now." The pathway does not require political transformation in Russia, but assumes that it can no longer fight a prolonged war in Ukraine, challenge NATO territory and sustain the same level of support for regional partners simultaneously. Uncontrolled fragmentation would create different dangers, including arms leakage, organised crime, non-state violence and intensified covert operations. Conversely, Russian military recovery, a prolonged war that prevents Ukraine from regaining territory, or a successful Baltic confrontation would leave the candidate neighbourhood more contested. Russia must remain threatening enough to discourage a post-crisis reduction in defence commitments by European governments while losing much of its capacity to shape outcomes elsewhere.

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Chinese and Turkish involvement remains compatible with this order unless it constrains EU choices. Türkiye can cooperate with EU governments on Black Sea security, energy and connectivity while retaining relations with Russia; Chinese capital and technology can remain important without supporting an alternative regional order. A geopolitical analyst from a Western Balkan research institute even envisages "a strategic rapprochement with China to keep its economy/trade afloat and as a means of using China's leverage to contain Russian aggression on Europe." The boundary is practical: dependence on Chinese technology or infrastructure, or on Turkish security capabilities, becomes incompatible with the macroscenario where it gives either actor sufficient leverage to constrain EU policy. Short of that threshold, their continued presence does not prevent the EU from setting the principal constraints on regional relationships.

Stronger EU incentives and penalties only matter if governments use them. Enlargement must deliver membership, while access to funding and market benefits must remain conditional on compliance with accession requirements. Strategically important candidates cannot be exempted whenever enforcement becomes inconvenient. A North Macedonian academic specialised in economy expects a more proactive EU to "make the accession process more predictable" and "limit the maneuvering space of autocratic leaders." Serbia tests this directly. Lithium, infrastructure, migration cooperation or regional stability could again encourage EU governments to tolerate foreign-policy divergence or deteriorating democratic standards. Bosnia and Herzegovina tests whether obstruction carries costs independent of pressure from Serbia; Georgia whether geopolitical accommodation can occur without democratic transformation. Actors who "do not benefit from increased rule of law," the North Macedonian academic warns, may seek to "destabilise the credibility of EU/the value system it promotes." The macroscenario can accommodate uneven democratic outcomes, but not conditionality that candidate governments can ignore at limited cost.

The financial demands could also exceed the political resources available to sustain them. Defence spending, support for Ukraine, enlargement, energy restructuring, technological investment and industrial policy all compete for public money. Candidate governments face costs where accession requirements collide with incumbent interests, fiscal constraints or controversial mining and infrastructure projects. A prolonged European downturn, renewed sovereign-debt stress or the bursting of an AI investment bubble could cut tax revenues and private investment while governments are financing defence production, reconstruction, energy infrastructure and computing capacity. A weaker Russia and the end of large-scale fighting would also reduce the immediate political pressure behind some of these commitments. One

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Western Balkan geopolitical analyst notes that “even in the best-case scenario, the EU will struggle to act on controversial political questions” beyond areas where established rules already exist. Defence production, accession funding and infrastructure programmes therefore have to remain politically and fiscally viable after the shocks that prompted them have passed.

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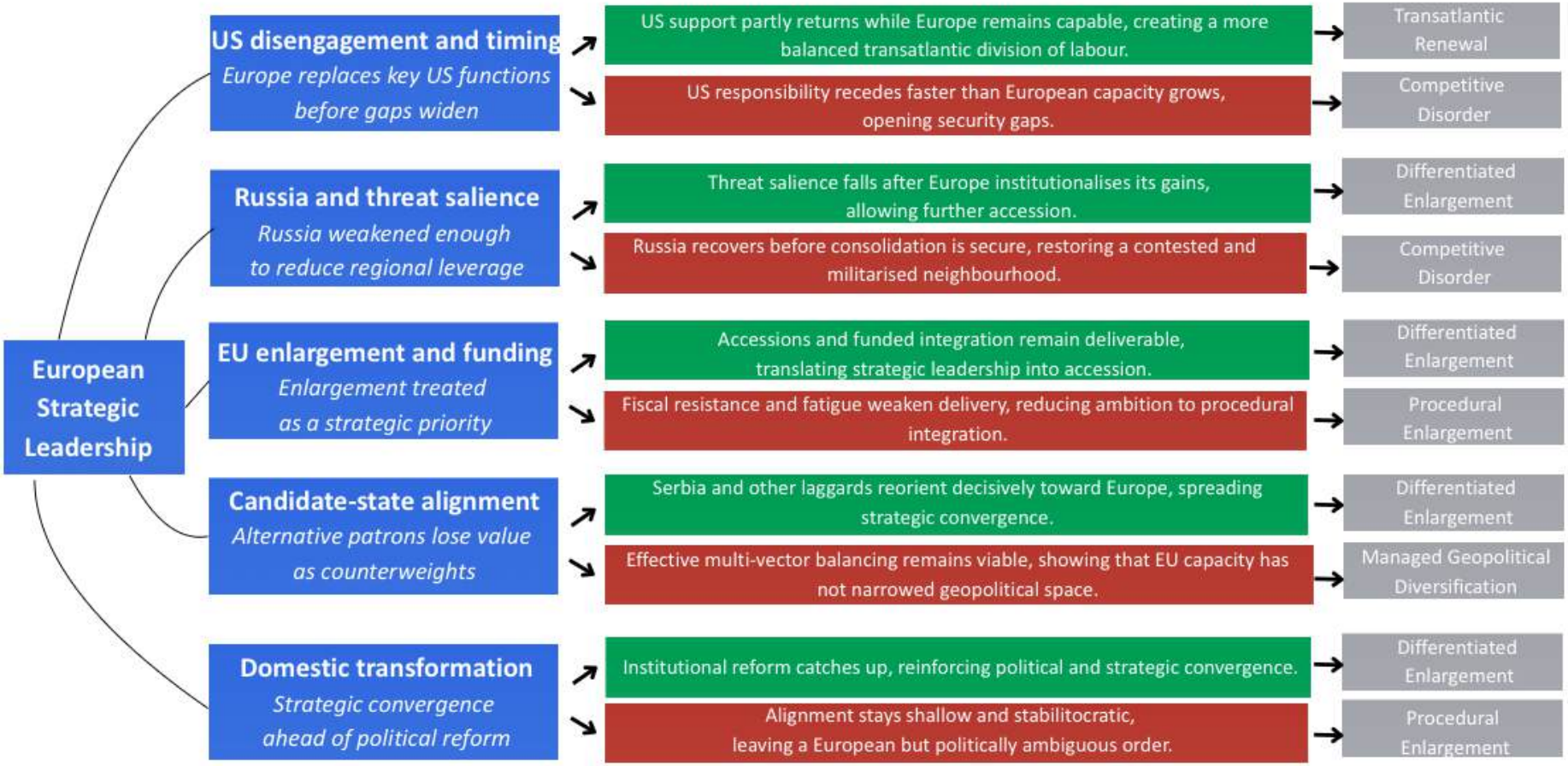
Figure 10: Divergence Tree (European Strategic Leadership)



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MACROSCENARIO 6 | Alternative Order

Scenario type: Nightmare
Plausibility: Low
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	*Proactive Order-Setter*	*Restrained Strategist*	*Technocratic Order-Setter*	***Declining Stakeholder***
United States	*Regional Security Architect*	*Strategic Retrenchment*	*Distracted Security Leader*	***Chaotic Withdrawal***
China	***Regional Order-Shaper***	*Selective Economic Engagement*	*Overextended Expansion*	*Residual Engagement*
Russia	***Consolidated Expansionist***	*Strategic Retrenchment*	*Unstable Expansionist*	*Chaotic Withdrawal*
Türkiye	***Principal Regional Actor***	*Calibrated Regional Power*	*Overreaching Broker*	*Regional Retreat*

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Snapshot: 2031

By 2031, the EU candidate neighbourhood has been carved into overlapping hierarchies of foreign power. Ukraine, Moldova and Georgia live within security boundaries set in Russia. Chinese capital and technology run through ports, mines, railways, power grids and state databases from the Black Sea to the Balkans. Türkiye is attempting to counterbalance Russian and Chinese power with its own network of military, political and economic relationships.

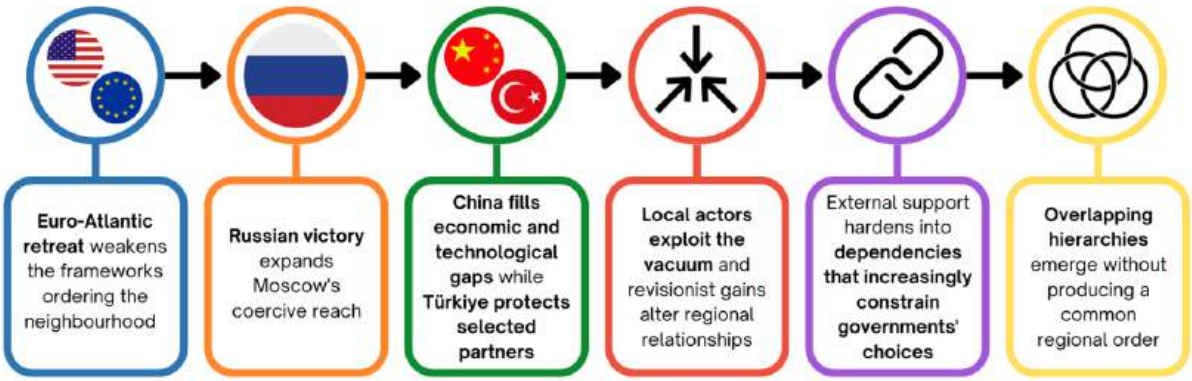
The geopolitical collapse has reached inside the EU. Nationalists govern France, Germany and Poland. They disagree over Russia, defence and the future of Europe. NATO has been hollowed out. A Russian incursion into the Baltic states exposed the end of the American guarantee and split Europe into rival security camps. Enlargement has ceased to organise the politics of the neighbourhood.

Ukraine is defeated and disintegrating. Russia controls much of its Black Sea coast and restricts its foreign and security policy. Armed factions fight over weapons, infrastructure and what remains of the state. Moldova has returned to Russian tutelage. Georgia accommodates itself to Russian power.

In the Western Balkans, the post-war geopolitical consensus has broken apart. Republika Srpska has seceded. Bosnia and Herzegovina exists only on paper. Serbia has taken part of northern Kosovo. Türkiye arms and protects Albania, Kosovo and Bosniak actors against further Serbian expansion. Montenegro is paralysed by communal confrontation. Cheap drones, Ukrainian weapons and foreign intelligence feed conflicts that no common security system can police.

There is no successor to the Euro-Atlantic order. Power belongs to whoever can arm, finance, supply or frighten the state in front of them.

The scenario's causal logic



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Pathway to 2031

Between 2026 and 2028, the Euro-Atlantic security order breaks apart. The Trump administration effectively withdraws the USA from NATO, ending the American guarantee on which European collective defence has rested. Hostility between the USA and EU hardens. The rupture widens political divisions across the EU. In 2027, the Rassemblement National wins the French presidency and Law and Justice returns to power in Poland in coalition with far-right parties. Nationalist parties strengthen further in the 2029 European elections, and the Alternative for Germany enters government after that year's federal election, breaking the longstanding Brandmauer. France pursues an autonomous national defence policy, Germany seeks accommodation with Russia, and Poland concentrates on containing the Russian threat. European NATO members cannot replace the security architecture abandoned by the USA. EU enlargement loses political momentum, with its instruments repurposed towards immediate stability. As a representative of a civil society organisation in the Eastern Neighbourhood puts it, “the West's willingness to compete for the neighbourhood collapses on both fronts at once.” Candidate states retain their “formal aspiration toward EU membership,” but it becomes “decoupled from any real prospect of delivery.”

Ukraine suffers the first military consequences. The USA ends military support and intelligence sharing. European NATO members cannot replace the lost weapons and intelligence in sufficient volume. Russia combines a more efficient second mobilisation wave with expanded missile and drone production, North Korean manpower and electronic warfare, degrading Ukrainian infrastructure and defence production as manpower and air-defence stocks dwindle. By 2028, battlefield losses and fiscal pressure threaten Ukraine's ability to sustain the front and the state. China emerges as the principal intermediary. As a think-tank analyst specialised in the Eastern Neighbourhood envisages it, “China was the only actor that showed up with concrete proposals and reconstruction funding.” Ukraine accepts a settlement recognising Russian territorial gains and severely restricting its future security partnerships. Russia consolidates control over much of Ukraine's Black Sea coast, gaining leverage over maritime access and agricultural exports. Volodymyr Zelensky's government falls, replaced by a leadership committed to implementing the settlement and reopening relations with Russia.

Defeat fractures Ukrainian politics without pacifying the country. A Ukrainian academic specialised in defence policy warns that an imposed settlement could “discredit political leaders, intensify conflicts over responsibility for defeat and encourage radicalisation in the territory remaining under Ukrainian control.” Demobilisation, fiscal breakdown and a settlement

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widely regarded as capitulation weaken civilian control over Ukraine's wartime security apparatus. Political factions build ties to veteran and military formations; some refuse orders to disarm, seize weapons depots and infrastructure, or clash with government forces. Armed groups contest the settlement and compete for weapons, territory and state funds, with Russia feeding the fractures. Weapons accumulated during the war enter trafficking routes through Moldova and the Western Balkans as international programmes targeting small-arms proliferation, organised crime and hybrid threats are cut back. Russia restricts Ukrainian foreign and security policy without occupying or reconstructing the whole country.

Ukraine's defeat demonstrates that Russia can enforce security constraints beyond Ukraine. In Moldova, political networks, sympathetic media, business interests, religious institutions and covert financing strengthen parties and constituencies favouring accommodation with Russia, supplemented by pressure through Transnistria and Gagauzia. The pro-European coalition around President Maia Sandu loses power to a Russia-backed government advocating closer economic ties and stricter neutrality. Moldova curtails defence cooperation with European states and abandons policies Russia defines as threatening. In Georgia, Ukraine's defeat strengthens the government's case that confrontation with Russia risks national catastrophe. Opposition efforts to restore a Euro-Atlantic trajectory lose force, while sanctions, defence initiatives and other policies likely to provoke Russia are avoided. EU candidacy persists in both countries, but no longer offers a credible path to accession; economic integration with the EU coexists with security policies bounded by Russian power.

Military victory restores the coercive value of Russian energy and economic ties. The USA lifts many restrictions after the Ukrainian settlement. Several European governments favouring accommodation with Russia reopen commercial channels. Russian hydrocarbons, storage arrangements and nuclear-energy ties regain strategic importance, with Moldova and Georgia providing routes for Russian trade and capital into EU markets. Russia's economy is too small to replace the EU as the neighbourhood's dominant economic and regulatory reference point. Energy dependence, security pressure and political networks nevertheless give Russia leverage over decisions touching its core interests.

Chinese capital begins reorganising the region around new production and transport corridors. A Georgian policy expert envisages China becoming “not only an investor, but a structural economic organizer.” Chinese financing enters reconstruction in Russian-held Ukrainian territory; the EU and USA refuse participation. In Serbia, Chinese mining and processing investments connect with power generation, industry and Chinese-built transport

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infrastructure. Georgia's Black Sea ports and east-west railways serve as an eastern hinge for the Middle Corridor. Chinese-backed transport and energy investments extend through the South Caucasus and Türkiye towards southeastern Europe. Cheap renewable technology ties parts of the green transition to Chinese equipment and supply chains. As a country risk analyst at an international consultancy group warns, China's ability to deploy investment "at a faster and cheaper rate compared to the EU creates technology lock-ins." An academic specialised in the Western Balkans and security policy envisages that "the centre of gravity of politics, trade, and attention is pulled south-east towards the Black Sea, Middle Corridor, and Middle East, making inflection points there (such as Iran) even more consequential."

Chinese-supplied technology enters state administration itself. Governments procure integrated systems supplied by Chinese firms rather than individual equipment. Customs and border platforms link freight records, tax databases, biometric identification and surveillance; electricity-management systems integrate smart metering, storage and grid balancing. AI is incorporated into both, with suppliers retaining control over software updates, maintenance and specialist expertise. Changing supplier requires governments to migrate databases, replace interconnected systems, retrain personnel and secure alternative financing without interrupting essential functions. A representative of a civil society organisation focused on the Eastern Neighbourhood summarised the resulting relationship as "Russia's security/energy leverage, China's infrastructure/financial leverage." Russia determines which security choices remain feasible; dependence on Chinese suppliers narrows infrastructure and technology choices.

Russia tests the residual NATO security guarantee on the Baltic frontier. Around 2028/2029, it stages a limited military incursion, correctly calculating that the USA will refuse to intervene, Germany will urge restraint and France will decline to extend its nuclear deterrent. Poland, the Baltic and Nordic states fight alongside British, Dutch and Canadian forces. They force Russia to withdraw, but coordination of forces, logistics, air defence and escalation policy proves slow and improvised without the USA. Russia has established that an attack on NATO territory no longer produces a unified alliance response. The participating states form a northern and eastern security compact, integrating air and maritime defence, operational planning and logistics and expanding long-range fires, drone forces and ammunition production. NATO institutions remain but are hollow.

Serbia turns stalled enlargement into an opportunity for regional leadership. From 2028, it renounces EU membership as the organising objective of its regional policy and expands Open Balkan into an alternative framework for regional integration, encompassing trade, labour

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mobility, infrastructure and energy. The framework consolidates Serbian influence while the government presses for a new settlement of Serbian national questions in Bosnia and Kosovo. Discussion of confederation between Serbia and Republika Srpska enters mainstream politics. Russia provides diplomatic cover, intelligence and finance; Chinese capital supports the infrastructure underpinning the project, while sympathetic EU governments block a common response. Emboldened by Serbia's backing and the absence of a credible external constraint, Republika Srpska holds an independence referendum and votes to leave Bosnia and Herzegovina. Brčko district, which divides the territory of Republic Srpska, quickly becomes the principal flashpoint, while Serbia guarantees RS against coercion.

Republika Srpska's secession triggers a territorial struggle over what remains of Bosnia and Herzegovina. Croatia mobilises forces near the Bosnian border without attempting annexation and expands military support for Bosnian Croat structures. Access to Croatian LNG and onward gas infrastructure provides additional leverage over political actors inside Bosnia. Croatia demands extensive Croat territorial and institutional autonomy in any replacement settlement. Bosniak parties turn to Türkiye for arms, training and diplomatic backing. Croatia and Bosniak leaders cooperate against further Serbian expansion but clash over the division of authority inside Bosnia. Arms leaking from Ukraine and cheap drones lower the threshold for irregular violence; the withdrawal of EU and US security programmes weakens weapons control and policing. A representative of a Bosnian civil society organisation anticipates external powers competing through “transactional influence, infrastructure control, energy dependency, digital systems and security arrangements.” Bosnia and Herzegovina retains international recognition but no longer functions as a single state.

The RS referendum also destabilises Montenegro. Serb nationalist parties in the Montenegrin government demand constitutional changes and closer institutional ties with Serbia. Some openly discuss confederation. Montenegrin, Bosniak and Albanian parties close ranks against them. Disputes over the security services, the Serbian Orthodox Church, citizenship and municipal control become entangled with the struggle over RS secession and Serbia's regional ambitions. Russian-linked money and Serbian media networks support the Serb nationalist camp; Croatia and Albania back its opponents. Government formation repeatedly fails, parts of the state apparatus lose cross-community legitimacy and political violence recurs. The Kosovo and Montenegro crises also harden communal politics in North Macedonia: Albanian parties press for expanded training, procurement and defence ties with Albania and Türkiye; Macedonian nationalists resist further power-sharing, straining the 2001 Ohrid framework.

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Serbia eventually attempts to change Kosovo's status and borders by force. Following riots in northern Kosovo, Serbia launches an intervention justified as necessary to halt the “ethnic cleansing” of Kosovo Serbs. KFOR responds under its UN-mandated authority, bringing its reduced force into direct confrontation with the Serbian military. The Baltic crisis has already demonstrated to the Serbian government that substantial NATO reinforcement will not come. As a Bosnian academic warned, “Serbia will be emboldened to take back Kosovo.” Russian and Iranian drone designs, loitering munitions, electronic warfare and AI-assisted targeting allow Serbian forces to seize positions in the north. Russia supplies intelligence and diplomatic support; China backs Serbia's sovereignty claim. KFOR blocks further Serbian movement but lacks the forces to retake the positions already lost. Türkiye deploys forces and supplies through Albania and provides Kosovo with drones, air defence and ammunition. The Turkish deployment deters Serbia from advancing further, and a ceasefire leaves part of northern Kosovo under Serbian control.

Türkiye becomes the main security partner of Albania and Kosovo and expands its support for Bosniak actors. Turkish forces and supplies move through Albania, while weapons deliveries and training to Kosovo and Bosniak formations continue after the ceasefire. Serbia's gains leave the Kosovo dispute divided between a Turkish-protected remainder and Serbian-held territory supported by Russia. As an academic specialised in the Western Balkans expects, “ethnic tensions” and “inter-state tensions” deepen.

Domestic power shifts towards intermediaries controlling access to foreign money, contracts and security backing. Governments reject EU conditions on procurement, judicial independence and state aid when bilateral deals provide alternative resources. Mining concessions, energy projects and technology contracts tie foreign capital to domestic patronage networks. Criminal groups move sanctioned capital through construction, logistics, energy trading and real estate and acquire legitimate firms with access to the EU single market and euro-denominated financial system. Governments tolerate troll farms, cyber contractors and AI-enabled influence operations directed at European politics. An academic specialised in security policy in the Western Balkans remarked: “transactionalism triumphs and reformists, democratic agents, and human rights activists lose out.”

By 2031, Russia is preparing to carry the strategy that broke the candidate neighbourhood into the EU itself. Energy ties, sanctioned capital, intelligence networks, cyber capabilities and political financing run through states that still trade predominantly with the EU but organise critical security choices around Russian power and rely on Chinese infrastructure. Russia seeks

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to make Europe's wartime fragmentation permanent by supporting governments and parties willing to obstruct common action and widening the split between the northern and eastern security compact and accommodationist states.

Where the pathway could diverge

Alternative Order appeared primarily as a nightmare scenario, but human and synthetic experts constructed it differently. Among human experts, 23 selections were nightmares and 18 wild cards, with none classified as baseline or preferred. Synthetic experts were more concentrated on the nightmare category, with 24 selections, compared with four wild cards and one preferred scenario. Their underlying configurations also differed. Human responses were comparatively diffuse, ranging from single-power hierarchies to more fragmented configurations involving several external powers. Synthetic responses more often converged on overlapping hierarchies, with different external powers exercising authority across particular sectors or parts of the neighbourhood.

Russia's capacity to impose a wider security hierarchy begins with Ukraine. Human responses envisage Russian victory, imposed territorial division or restrictions on Ukraine's future security relationships. One think-tank analyst specialised in the Eastern Neighbourhood sees “Beijing broker[ing] a deal between Russia and Ukraine, positioning itself as a security guarantor”; another envisages political change “forcing Kyiv to accept the permanent territorial division of the country.” If Ukraine retains the military capacity and political freedom to choose its security relationships, Russia has demonstrated coercive power without establishing a wider security hierarchy. Continued Ukrainian resistance, a viable postwar deterrent or Chinese brokerage that preserves Ukrainian autonomy would prevent Russia from imposing the security constraints envisaged in this macroscenario.

Some expert responses envisage Alternative Order as a single-power hierarchy. Russian-led variants among human experts are predominantly nightmares. An academic specialised in geopolitics envisages Russia recalibrating regional militaries towards Russian hardware “to anchor them to Moscow's leverage.” Chinese-led variants are more often wild cards. A North Macedonian academic specialised in economy envisages a “new regional alliance [...] harmonised with Chinese hegemony,” with Türkiye acting as a “regional guarantee” beneath Chinese leadership; while a Bosnian academic argues that “for all its power, China will not seek to rule this region.” Turkish-led variants are more strongly concentrated among wild cards,

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including arrangements in which the EU, according to a Turkish academic, “would still define formal rules, but Turkey would increasingly shape political tempo on the ground.”

This macroscenario instead combines overlapping hierarchies. Russia imposes security constraints and exercises energy leverage; China constrains infrastructure and financing choices, while Türkiye assumes narrower security roles. These relationships can coexist so long as the powers do not regularly impose incompatible demands in the same policy domains. One expert captures the division as “Russia's security/energy leverage, China's infrastructure/financial leverage,” but a civil society representative warns that “Russia-China convergence is more fragile than it looks.” Competition over infrastructure, energy, defence procurement or political clients would allow governments to bargain between rival powers, producing Competitive Disorder. This is described by a Turkish academic as “the coexistence of too much rivalry and too little order.” Regional Vacuum begins when foreign powers no longer reliably support clients or contain major crises, leaving domestic actors without reliable external constraint or crisis containment.

In the Western Balkans, instability alone does not establish an alternative order. A think-tank analyst focused on the Western Balkans expects reduced EU leverage to leave “instability […] managed rather than resolved.” Violence in Bosnia and Herzegovina, Kosovo or Montenegro can still be contained without changing the regional settlement. The macroscenario goes further: Serbia secures territorial or institutional gains under Russian protection, while Turkish security backing constrains subsequent choices by Kosovo, Albania and Bosniak actors. KFOR reinforcement or European intervention that reverses those gains would leave the existing territorial and security arrangements largely intact.

Alternative Order takes time to become difficult to reverse. A senior economist at a regional bank identifies “a visible breakdown of EU enlargement credibility (circa 2027–2028)”, particularly if frontrunners fail to advance. Prolonged Euro-Atlantic retreat allows foreign finance and security backing to become embedded in domestic political and commercial networks. It also weakens the EU institutions and programmes through which renewed political commitment could later be exercised. As a representative of a civil society organisation focused on the Eastern Neighbourhood warns, “even if EU political will eventually returns, the institutional muscle needed to execute wouldn't return automatically.” An accession breakthrough, restored US commitment, political turnover within candidate states or an effective European response to a major crisis could reopen political, financial and security alternatives before these dependencies harden.

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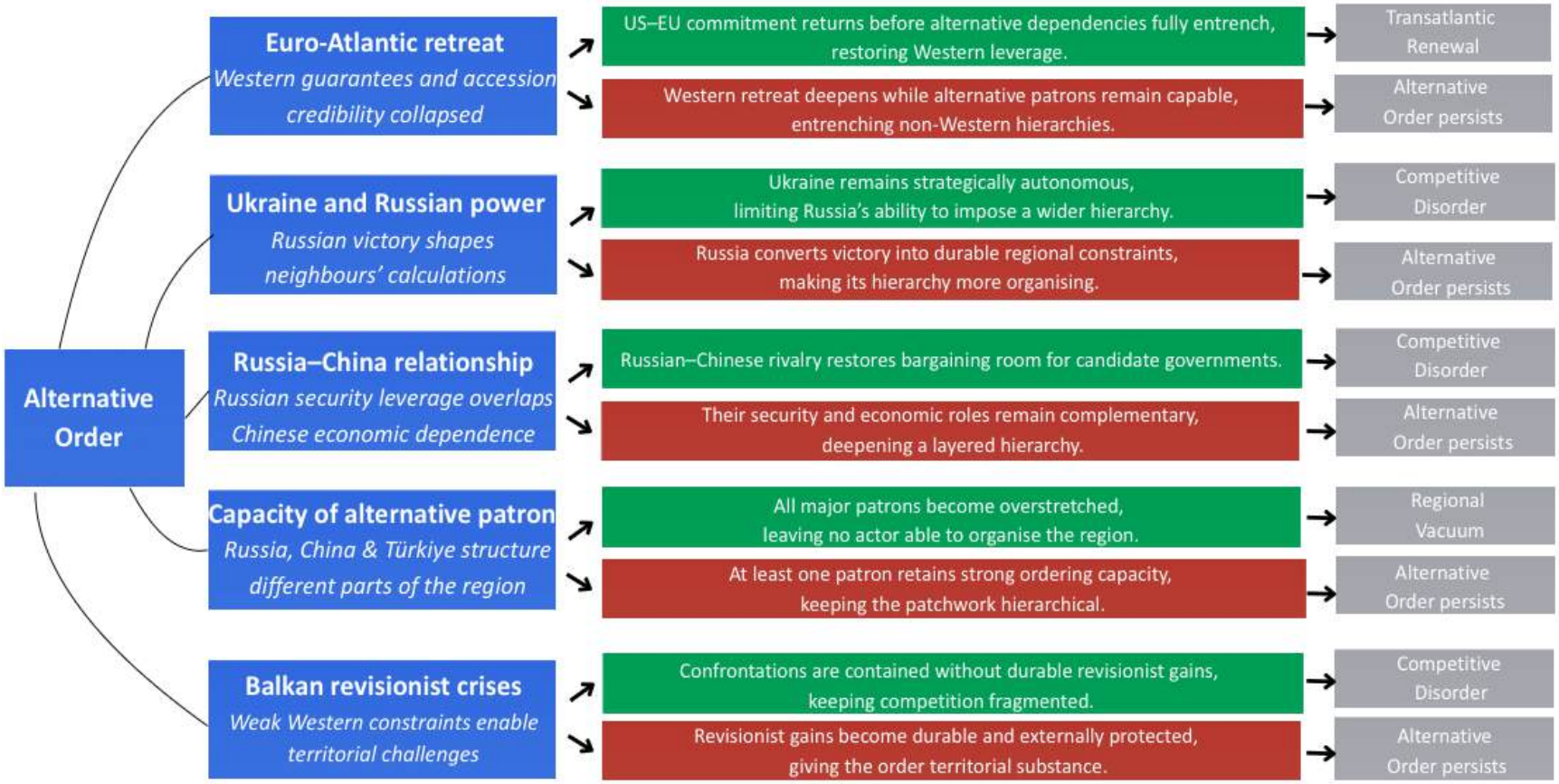
Figure 11: Divergence Tree (Alternative Order)



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MACROSCENARIO 7 | Competitive Disorder

Scenario type: Nightmare
Plausibility: Moderate
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	*Proactive Order-Setter*	*Restrained Strategist*	***Technocratic Order-Setter***	*Declining Stakeholder*
United States	*Regional Security Architect*	***Strategic Retrenchment***	*Distracted Security Leader*	*Chaotic Withdrawal*
China	*Regional Order-Shaper*	*Selective Economic Engagement*	***Overextended Expansion***	*Residual Engagement*
Russia	*Consolidated Expansionist*	*Strategic Retrenchment*	***Unstable Expansionist***	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	*Calibrated Regional Power*	***Overreaching Broker***	*Regional Retreat*

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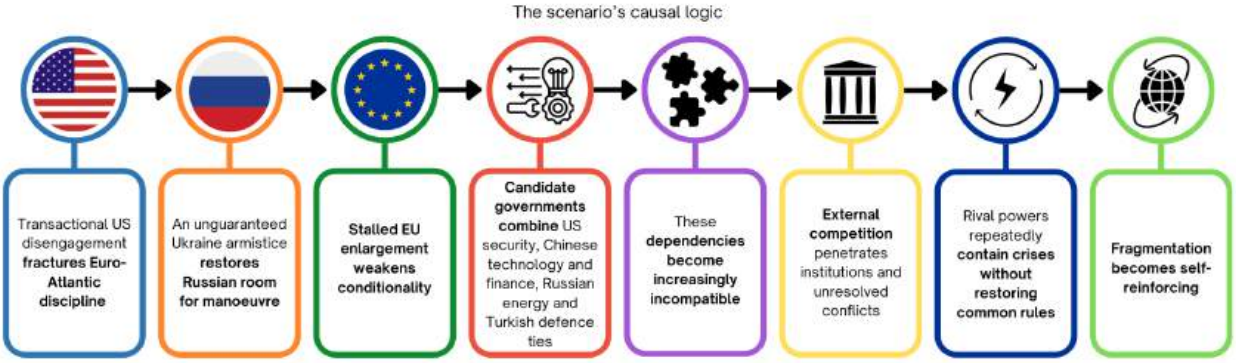
Snapshot: 2031

By 2031, the EU candidate neighbourhood is a geopolitical battleground. The EU is losing ground as the USA, Russia, China and Türkiye compete over the states on its borders. The USA treats the EU as a strategic rival, using weapons, intelligence, tariffs, sanctions and security guarantees to force concessions. Russia has forced Ukraine into an armistice that preserves its territorial gains but settles nothing. Ukraine has no enforceable security guarantee. The USA and Russia pursue different objectives but exploit the same European divisions. Russia fortifies the occupied territories and rebuilds its forces. EU governments argue over sanctions, defence and enlargement.

The struggle runs through the machinery of the state. Serbia operates parallel networks because American security cooperation and Chinese technology cannot coexist freely. Montenegro turns to China after accession stalls, then loses American intelligence cooperation and a weapons sale. Governments split contracts and pay to keep incompatible systems running. Banks, customs brokers and criminal networks profit from gaps between rival sanctions regimes. Türkiye arms partners that no longer trust common security arrangements. EU money and markets remain indispensable, but no longer command political obedience.

In the weakest states, geopolitical competition has broken into violence. Dayton has openly failed in Bosnia and Herzegovina. Rival police deploy, armed roadblocks divide communities and state institutions fracture. Northern Kosovo has seen Serbian-Kosovan fighting with drones, jamming and indirect fire. American, Turkish and European interventions stop the fighting without settling either crisis. In Ukraine, deep strikes continue while Russia and Ukraine prepare for another war.

No single power controls the neighbourhood. Several have enough power to tear it apart. The crises end; the machinery for the next one keeps growing.



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Pathway to 2031

Between 2026 and 2028, the USA treats a coherent European order as a threat to American interests. NATO commitments are reduced and collective defence becomes conditional, but the USA retains enough military, technological and financial power to shape individual European and candidate states. Weapons, intelligence, sanctions and bilateral security commitments are used to extract concessions, including where these conflict with EU policy. As a representative of an international organisation envisages it, "US involvement is sporadic, oftentimes disruptive, and focused on narrow issues," while NATO remains "active on paper" despite de facto American withdrawal. A Republican victory in 2028 preserves this policy. Donald Trump's successor turns personalised bargaining into a doctrine combining ideological hostility towards the EU with demands for bilateral concessions. The USA remains heavily involved in the candidate neighbourhood, but in competition with the EU.

Ukraine is the first state on which the new American terms are imposed. Two winters of Russian attacks on electricity, heating, data centres and other infrastructure coincide with dwindling stocks of ballistic-missile interceptors. The threat of ending US military and intelligence support pushes Ukraine towards an armistice around 2027–28 that freezes most Russian territorial gains, defers NATO membership indefinitely and leaves the occupied territories' status unresolved. Declining support threatens Ukraine's ability to finance the state and sustain the front simultaneously. Russia accepts less than its maximal demands because mobilisation, labour shortages, expensive credit and fiscal pressure make a pause attractive. The US-Ukraine Reconstruction Investment Fund expands into an agreement linking American participation in minerals, energy and reconstruction to selected weapons and intelligence.

The armistice leaves Ukraine without an enforceable security guarantee. The USA offers political assurances but no automatic commitment to fight if Russia resumes hostilities. A coalition of European NATO members makes stronger promises without a common enforcement mechanism. Russia fortifies occupied territory and rebuilds while Ukraine refuses to recognise the outcome. Deep strikes continue sporadically against Russian military and energy infrastructure and Ukrainian energy, logistics and defence production. Elections after the relaxation of martial law are dominated by the armistice, mobilisation and responsibility for territorial losses. Zelensky leaves office or emerges with substantially reduced authority, constrained by veterans, the security establishment and opposition to recognising territorial losses. As a Ukrainian academic specialised in defence policy puts it, "dependence on military employment and procurement could also give sections of the armed forces, defence industry

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and associated businesses an economic stake in preserving wartime arrangements, complicating any subsequent [political] transition." Ukraine remains heavily armed, militarised and technologically capable.

The USA and EU pursue different Russia policies after the armistice, while both the USA and Russia exploit divisions among EU member states. The USA suspends restrictions on selected Russian banks and energy transactions while retaining controls on military and dual-use sectors. The EU maintains broader sanctions, but enforcement and exemptions become contested by member states. Russia exploits the gaps through intermediaries and cultivates governments and parties willing to obstruct sanctions, defence spending or enlargement. The USA threatens tariffs, secondary sanctions or restrictions on security cooperation when member states resist American demands. American and Russian interests sometimes conflict and sometimes coincide; neither requires a cohesive EU.

Accession negotiations continue, but candidates have less reason to organise their foreign policies around them. The 2028–34 EU budget maintains candidate financing, negotiations and sectoral integration. Montenegro, having completed most of the technical accession process by 2028, encounters demands for post-accession safeguards and bilateral objections and remains outside the EU in 2031. Failure to deliver integration "even for Montenegro", as a North Macedonian think-tank analyst warns, ends up "killing the hopes of all other candidate countries." Serbia sees little reason to sacrifice useful American, Chinese and Russian relationships. Moldova and Ukraine continue adopting the acquis for access to EU markets, finance and programmes while treating membership as more distant.

Repeated accession delays make bilateral vetoes more valuable to member states. Bulgaria continues to block North Macedonia and Greece maintains pressure on Albania over minority and property issues. Croatia withholds support at a critical stage of Bosnia and Herzegovina's accession until demands over Croat electoral representation are addressed. Delay is also less costly for candidates when Chinese loans, Gulf capital, Turkish investment and bilateral American deals are viable alternatives. Governments can resist individual EU demands while continuing EU integration, or simply look for the "highest bidder." As a Western Balkan researcher puts it, "reforms (enlargement) become selective bargaining tools, not systemic change."

Severe heat and drought towards the end of the decade force urgent energy decisions. Hydropower production falls particularly sharply in Albania and Montenegro, tightening

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electricity supply across Balkan markets. Moldova faces agricultural and energy pressures, while heat compounds the strain on Ukraine's damaged grid. Governments need generation, storage, grid upgrades and water infrastructure quickly. Chinese solar and storage equipment, EU-funded interconnectors, emergency gas-fired generation through Balkan and Turkish routes and separately financed grid infrastructure are assembled according to immediate availability. Decarbonisation continues without producing a coherent regional energy system.

By the late 2020s, technological incompatibility begins to impose direct costs on geopolitical balancing. Access to American weapons, intelligence, semiconductors and frontier AI systems comes with demands to exclude Chinese technology from sensitive sectors. Serbia, having accumulated Chinese digital and defence systems over the previous decade, builds parallel networks and restricts data flows to preserve access to both Chinese and American technology, paying twice for infrastructure that cannot fully communicate. After being denied accession and hit by successive summers of weak hydropower production, Montenegro accepts Chinese financing for storage and grid modernisation, including digital systems. The USA makes their exclusion from sensitive networks a condition for intelligence cooperation, defence procurement and access to advanced technology. When the Montenegrin government refuses, the USA suspends selected intelligence cooperation and freezes a planned weapons sale. Montenegro eventually restructures the programme at substantial cost. A state closely aligned with the Euro-Atlantic order is penalised for seeking elsewhere what that order failed to provide.

Chinese participation in Georgia's Anaklia deep-sea port triggers confrontation with the USA. The US administration threatens restrictions on security cooperation unless Chinese operational or ownership control is reduced. Disputes over ownership, operators and security arrangements delay development. Chinese-built sections of Serbia's Belgrade-Budapest railway and industrial assets must connect with EU-funded infrastructure governed by different requirements. Investment in Corridor VIII accelerates as outside powers compete over east-west logistics and Black Sea and Adriatic access. Governments split contracts, redesign projects and seek exemptions to avoid choosing one system. Competition between Chinese- and EU-backed infrastructure, one expert warns, can force states into “increasingly difficult strategic alignment choices,” as a country risk analyst at an international consultancy group put it.

Different sanctions and technology regimes expand the market for circumvention and re-export. Routes through the Adriatic and central Balkans connect with Moldova and Black Sea routes through Türkiye and the South Caucasus, carrying dual-use electronics, machine tools,

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petroleum products and components between jurisdictions applying different sanctions, export-control and technology restrictions. Banks, customs brokers and logistics firms specialise in transactions permitted by one sanctions regime and restricted by another. Smuggling and money-laundering networks extend into sanctions circumvention and technology procurement. Captured public institutions provide licences, contracts or exemptions without any single foreign government controlling the state as a whole. A Georgian former policymaker expected governments to "prioritis[e] short-term benefits over long-term strategic alignment," while "overlapping and contradictory financial packages" leave projects carrying obligations to incompatible partners.

Repeated accession delays make costly reforms harder to justify and emigration more attractive. Nationalist and anti-establishment parties advocate taking investment, weapons and market access wherever available without accepting wider political conditions, while state capture remains entrenched. Emigration continues across the Western Balkans, Moldova and Georgia and remains high in post-armistice Ukraine. States lose engineers, technicians and administrators needed to operate energy, defence and digital infrastructure and deploy new AI systems, forcing governments to buy more technical capacity from the same foreign suppliers on which they are trying to reduce their dependence.

In Bosnia and Herzegovina, the Dayton settlement fully breaks down. The OHR succession dispute develops into open disagreement among the states involved in supervising the post-war settlement. A compromise European appointee acceptable to the USA eventually takes office, but the Bonn Powers become entangled in bargaining among external actors. Intervention against an RS measure can be withheld to secure agreement elsewhere; concessions over state property become part of negotiations over participation in state institutions. Republika Srpska transfers further functions to entity institutions and expands parallel policing and administration, calculating that Serbian and Russian support can force negotiation before intervention. Croat parties threaten state-level cooperation while Croatia withholds support at critical accession stages. Bosniak leaders seek Turkish arms, training and political guarantees.

Violence returns to Bosnia and Herzegovina for the first time since the 1990s. Rival police deploy around contested state property, security services stop exchanging information and entity authorities obstruct tax and judicial enforcement. Armed roadblocks appear around Brčko and sections of the inter-entity boundary. Violent attacks on returnee communities, political offices and police facilities provoke retaliation. EUFOR repeatedly deploys to separate armed groups and reopen routes without restoring common authority. By 2031, taxation,

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policing, justice and infrastructure no longer function consistently across the country. The result is “overlapping external interventions” without “a unified crisis-management framework,” warns a country risk analyst from an international consultancy group.

A crisis in northern Kosovo escalates into direct Serbian-Kosovan fighting. Kosovo expands its Turkish-backed drone, counter-drone and electronic-warfare capabilities. Serbia combines Chinese air defence and UAVs with Israeli electronic-warfare and command systems, European equipment and its own defence industry. The confrontation moves from barricades and police violence to jamming, drone strikes, indirect fire and limited cross-border engagements. KFOR retains formal authority over Kosovo's airspace, but NATO's political cohesion is weaker. Türkiye provides Kosovo with its closest external defence relationship, while Serbian procurement creates dependencies on several suppliers. Separate American, Turkish and European interventions stop the fighting before it becomes a sustained war, but leave new mobilisation, bilateral commitments and weapons purchases behind. The crises still end; the machinery for producing the next one grows stronger.

In 2030, a major quantum-computing breakthrough makes attacks on widely used public-key encryption technically credible. Governments that expected years to migrate to quantum-resistant encryption suddenly have much less time. The EU, USA and China promote cryptographic ecosystems with different security requirements. Networks assembled from several suppliers cannot simply be upgraded together. Intelligence services demand the exclusion of untrusted hardware; ministries face choices over cloud providers and encryption standards; banks, energy operators and defence ministries race to replace vulnerable systems while encrypted material harvested years earlier may become readable. Quantum migration requires choices that network segregation had allowed governments to avoid.

Where the pathway could diverge

Competitive Disorder depends on sustained but unresolved geopolitical competition. The expert responses grouped under this macroscenario are unusually heterogeneous. Of the 30 human experts who outlined macroscenarios conforming broadly to its logic, 15 described them as nightmares, eight as baselines and seven as wild cards. Some envisage a competitive environment in which candidate states retain considerable freedom at rising geopolitical cost; others describe externally penetrated fragmentation, structural disorder or proxy conflict; still others approach Alternative Order as Russia, China or Türkiye acquire disproportionate influence. Synthetic responses are similarly dispersed, although they lean further towards

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fragmentation and more consistently assume reduced US engagement. Most human responses associate fragmentation with a passive, divided or declining EU, usually alongside American retrenchment or withdrawal. Others reach a similar configuration through greater external involvement. One wild card envisages China expanding its footprint as the EU accelerates enlargement, producing direct competition between two more active actors; another envisages an assertive USA confronting Russia through rival regional clients. Nonetheless, there are recurring assumptions across the responses.

Candidate governments continue trying to combine competing external relationships even as doing so becomes more costly. EU funding, market access, accession negotiations and regulatory alignment remain important without determining governments' wider geopolitical choices. A country risk analyst expects “aggressive multi-vector balancing strategies” through which governments maximise benefits while avoiding exclusive alignment. A North Macedonian think-tank analyst experts envisage “individual candidate states aligning with different external sponsors” on particular issues, before becoming “paralyzed by conflicting ultimatums from competing global powers” over Chinese technology, Russian energy and Western integration Conflicting procurement rules, technological standards, security relationships and political obligations make hedging progressively harder to sustain. Governments respond by splitting contracts, maintaining parallel systems and seeking exemptions rather than settling into durable exclusive alignments.

American power remains consequential without restoring sustained EU-US coordination. Synthetic experts overwhelmingly envisage strategic retrenchment, chaotic withdrawal or a distracted security role. Human responses are more varied. A think-tank analyst specialised in regional security identifies “the longevity of the Trump regime” and the electoral success of Republican restrainers as a key determinant; others envisage reduced security provision or narrow commercial engagement. An academic focused on Serbia and Kosovo reverses the assumption entirely, expecting “the US [to] get awakened to maintain its influential sphere in Europe” and enter proxy competition with Russia in the Western Balkans. The 2028 election could restore greater EU-US coordination or deepen the erosion of American security provision and conflict-management mechanisms. Competitive Disorder instead assumes continued American involvement through bilateral security relationships, commercial pressure and selective intervention that can cut across common EU positions without displacing EU structural predominance.

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The settlement in Ukraine leaves Russia capable of applying pressure without establishing a regional security hierarchy. Human experts deem decisive what a private sector representative summarises as "the conditions of a potential peace deal […] including whether Ukraine receives security guarantees, how stable the deal proves to be, and what it means for EU accession.". The pathway assumes an agreement that ends high-intensity warfare without resolving the territorial dispute or providing a credible common security guarantee. Continued war would keep absorbing Russian resources while preserving the immediate security rationale for European engagement. Ukrainian defeat or an agreement demonstrating that Russia can enforce outcomes its opponents cannot reverse would strengthen Russian coercive power elsewhere. A think-tank analyst specialised in the Eastern Neighbourhood nevertheless expects "the interdependency between Ukraine and the EU [to] persist", with European finance exchanged for Ukrainian defence know-how, innovation and military experience, while warning that stalled enlargement could alienate Ukraine politically.

Candidate institutions retain enough capacity to manage external penetration without preventing it. A Montenegrin senior policymaker argues that "countries with stronger institutions would be better able to balance multiple partnerships," while weaker states become more vulnerable to external influence, polarisation and governance problems. A North Macedonian think-tank analyst describes institutions, judiciaries and public administrations being "inundated with competing funds, conflicting regulatory demands, and intense diplomatic pressure" and envisaging "corruption […] funded and shielded by competing external superpowers." Synthetic experts similarly connect multi-vector engagement with political financing, corruption, infrastructure dependence and institutional capture, including parties and elite networks using foreign partnerships for resources and protection. Stronger states may preserve substantial bargaining power while weaker states or sub-state entities become penetrated by several external actors simultaneously. Enough state capacity survives for governments to continue bargaining among these relationships, even as doing so makes institutions more expensive to operate and easier to capture.

No external power converts its advantages into sufficiently durable authority to organise the wider competition. Expert responses differ over how stable this assumption is. A representative of an international organisation expects Türkiye's "overambitious policy in the Southern Caucasus [to be] checked by Russia," while a geopolitical and security analyst from a regional think-tank expects "Turkey [to] fight Russia over control of the Black Sea." China can also remain one economic partner among several or accumulate dependencies that constrain candidate choices. The aforementioned analyst expects it to use the Balkans as its "most important entry

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point into Europe" and to "control infrastructure and trade regimes." Russia, China and Türkiye can constrain particular states or sectors without acquiring enough durable authority to organise the regional competition. Competitive Disorder requires their relationships to remain contested enough that candidate governments retain alternatives, even where particular dependencies become difficult or costly to exit.

External actors retain enough capacity to contain the security crises their competition helps generate. Some human experts expect the sheer "volume of political, military, and financial inputs entering the region" to overwhelm already weak institutions. Others envisage external actors treating the neighbourhood as a "battleground", with outside sponsorship intersecting with domestic cleavages. One Western Balkan academic describes how "these dividing lines overlap significantly with ethnic divisions, contributing to inter- and intra-state conflict." Another academic envisages a "proxy-war setting between rivaling global powers and their local proxies." Bosnia and Herzegovina and northern Kosovo recur as locations where local crises could draw in external powers, while crises in Moldova, Georgia and Ukraine can also draw competing external powers into local confrontations. Other responses stop short of war but envisage rapid defence spending, local military coalitions and proliferating minilateral security relationships. The pathway can accommodate serious violence provided separate external interventions still stop escalation before it produces sustained proxy warfare, uncontrolled territorial revision or institutional collapse.

Competitive Disorder sits between three adjacent trajectories. If external relationships remain sufficiently compatible to be combined without prohibitive costs, the neighbourhood remains closer to Managed Geopolitical Diversification. If Russian, Chinese or Turkish relationships become sufficiently asymmetric and durable to organise important candidate choices, it moves towards Alternative Order. If competition overwhelms the remaining capacity to contain major security crises, it moves towards Regional Vacuum. Competitive Disorder persists while governments continue bargaining among relationships that have become mutually constraining, without either durable hierarchy or a collapse of residual containment.

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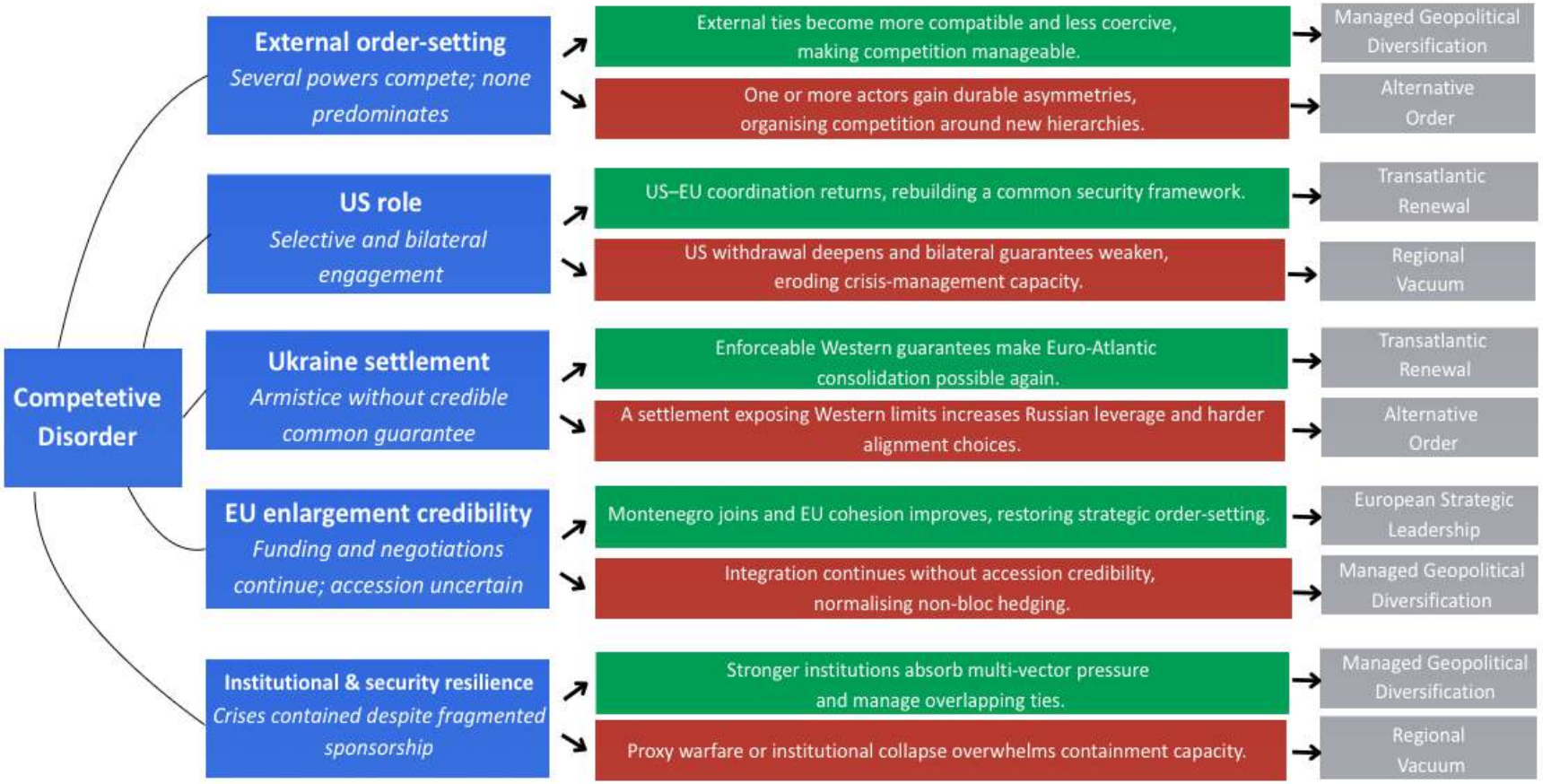
Figure 12: Divergence Tree (Competitive Disorder)



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MACROSCENARIO 8 | Regional Vacuum

Scenario type: Nightmare / wild card
Plausibility: Very low
Representative external-actor configuration:

External actor + posture	Strategic Alignment x Regional Order-Setting (a)	Strategic Alignment x Selective Engagement (b)	Fragmented Alignment x Regional Order-Setting (c)	Fragmented Alignment x Selective Engagement (d)
EU	*Proactive Order-Setter*	*Restrained Strategist*	*Technocratic Order-Setter*	***Declining Stakeholder***
United States	*Regional Security Architect*	*Strategic Retrenchment*	*Distracted Security Leader*	***Chaotic Withdrawal***
China	*Regional Order-Shaper*	*Selective Economic Engagement*	*Overextended Expansion*	***Residual Engagement***
Russia	*Consolidated Expansionist*	***Strategic Retrenchment***	*Unstable Expansionist*	*Chaotic Withdrawal*
Türkiye	*Principal Regional Actor*	*Calibrated Regional Power*	*Overreaching Broker*	***Regional Retreat***

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Snapshot: 2031

By 2031, the candidate neighbourhood has become a chain of emergencies that nobody intends to resolve. Drought empties hydropower reservoirs; fuel and imported electricity consume money governments no longer have. A financial crash closes factories, destroys jobs and starves banks of credit. Pensions and public salaries arrive late. Basic goods become expensive and unreliable.

The powers that once managed regional crises are fighting larger battles elsewhere. Ukraine is an armed society fighting an interminable war. Russian support for Transnistria and Abkhazia is collapsing, leaving impoverished enclaves to criminal networks. The USA and China are locked in confrontation across the Pacific, taking American military power and Chinese money with them. Türkiye is at war with Israel. The EU wants minerals, electricity and closed migration routes. Accession has become paperwork for membership that will never come.

In the Western Balkans, the state is losing ground to whoever can keep the lights on. Criminal organisations keep hospitals supplied, fuel moving and cash circulating where governments cannot. Northern Kosovo is an armed smuggling economy where weeks of fighting leave KFOR defending positions it cannot govern. Bosnia and Herzegovina is coming apart through unpaid salaries, captured revenues and parallel institutions. Republika Srpska has acquired the machinery of separation without waiting for permission to secede.

Foreign powers intervene to protect a mine, a military position, a migration route or an ally, then leave. There is always someone willing to interfere. There is nobody left to take responsibility. **The most dangerous place in 2031 is the crisis nobody important considers important enough to stop.**

The scenario's causal logic

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Pathway to 2031

By 2026, governments are still absorbing the costs of successive crises. The pandemic, Russia's full-scale invasion of Ukraine and the European energy crisis have already weakened public finances, while renewed disruption in the Middle East adds further pressure. The next shocks arrive before they can recover. Disruption around the Strait of Hormuz persists into 2027, pushing oil above $100 per barrel and keeping European gas and electricity prices high. A severe summer drought drives down hydropower generation across much of the Western Balkans and Georgia, forcing hydro-dependent systems onto expensive regional electricity markets. Albania is particularly exposed. Low Danube levels disrupt freight and tighten energy and commodity supply. Governments again subsidise households and purchase emergency electricity, this time with higher borrowing costs and less room to borrow. Elsewhere, simultaneous crises consume what a Kosovan researcher describes as “the strategic attention, political capital, and financial resources” previously committed to the candidate neighbourhood.

The AI investment boom collapses into a wider financial crisis. Investment in data centres, semiconductors, generation and grids had rested on expectations of rapidly rising AI demand and productivity. Expensive power, grid bottlenecks, high interest rates and disappointing commercial adoption expose the weakness of that investment model. Technology valuations fall, projects are cancelled and losses spread into property, construction and credit markets. A Ukrainian think-tank analyst anticipates “global recession” alongside “AI-enabled radical reshaping of global economy and labour domains.” The crash reaches candidate economies through EU banks and European industrial demand, resulting in consolidation of credit and lending. Automotive-component manufacturing in Serbia and North Macedonia contracts with German industry, while foreign investment and remittances weaken. Governments that subsidised energy now face falling revenues, corporate failures and unemployment.

Recession and high energy costs turn economic dislocation into political crisis across the candidate neighbourhood. Governments that had already spent heavily cushioning earlier energy shocks have little room to absorb another fall in living standards. Governing coalitions fracture, cabinets fall and anti-establishment parties gain support as established parties are blamed for unemployment, higher bills and politically connected companies receiving preferential access to credit and public contracts. Protests bring together groups that had rarely mobilised together, including workers, farmers, pensioners and younger voters. Governments with stronger control over political institutions respond to the same pressures through repression rather than political turnover. Police repression, arrests and pressure on opposition

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organisations close off institutional channels for discontent. Confrontations between protesters and security forces become more violent.

The recession raises the cost of sustaining Russia's war against Ukraine without forcing Russia to end it. High crude prices benefit Russia, but Ukrainian strikes on refineries constrain the windfall and periodically cause domestic fuel shortages. Recruitment becomes more coercive as casualties rise. Maintaining the war requires still greater transfers of labour, money and industrial capacity from the civilian economy. One expert anticipates a corresponding loss of capacity for “selective engagement [and] geopolitical competition” across several theatres.

In 2028, China tests the USA's willingness to defend Taiwan. The Chinese government judges that an economically weakened USA under an administration ambivalent about defending Taiwan will tolerate limited coercion and imposes customs and security controls on selected maritime approaches. The USA responds with sanctions and deployments but initially avoids breaking the quarantine. China expands the controls until casualties involving a US-supported commercial convoy turn the quarantine into a direct US-Chinese military crisis. China redirects capital and diplomatic attention towards East Asia. New lending and investment in the candidate neighbourhood contract sharply. As a Kosovan geopolitical analyst describes it, existing projects are left “underfunded and poorly managed, creating debt exposure without delivering infrastructure.”

The Taiwan crisis turns US security retrenchment in Europe into an explicit division of resources and obligations. The USA demands sanctions and logistical assistance while shifting military capabilities towards Asia. European governments divide over these demands as semiconductor shortages and disrupted Asian shipping deepen the recession. American security commitments in Europe are expressly limited to states increasing their own defence commitments. Russia responds with a new attempt to break Ukraine. Missile and drone attacks repeatedly hit repaired electricity infrastructure, gas production and storage, defence plants and rail links, while Russian forces seek to complete the seizure of Donetsk. Reduced American supplies worsen Ukrainian shortages of air-defence interceptors and ammunition, allowing further Russian advances. Ukrainian drones, mines and fortifications stop the offensive from breaking the front, while strikes against Russian refineries, railways and defence plants intensify. Casualties rise as recession weakens commodity demand and the Taiwan confrontation restricts access to Chinese machinery and markets. Compulsory mobilisation widens and civilian investment is cut further. Nuclear signalling becomes explicit: dual-capable systems move closer to Ukraine and Russia threatens logistics hubs supporting Ukrainian forces. A Ukrainian

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think-tank analyst warns that “Russia […] can use nuclear weapons.” The threat divides European governments over further military assistance. Ukraine becomes a heavily militarised state in which the armed forces, veterans and defence sector acquire greater political weight, while mobilisation and security dominate public spending and government.

European governments narrow their engagement to critical supply chains and migration control. Enlargement is frozen indefinitely. Disrupted Chinese supply chains push European governments to secure Ukraine's critical minerals, Serbia's Jadar lithium deposits and the Bor copper complex, as well as electricity supplied through EU interconnectors. Access takes precedence over political reform. Governments controlling strategic resources receive investment and political support despite governance abuses. EU funding shifts towards border enforcement and returns, giving governments and criminal networks along migration routes an interest in containing flows without eliminating them. Accession negotiations and monitoring continue without any expectation of membership, reduced to what a Kosovan geopolitical analyst calls a “hollow administrative ritual.”

War between Türkiye and Israel removes the last major regional power positioned to provide sustained crisis management in the Western Balkans. Competition in Syria escalates as the Taiwan confrontation absorbs American attention and weakened US-Turkish relations leave the USA with little leverage over Türkiye. Israeli strikes kill Turkish personnel; Türkiye retaliates and fighting spreads into the eastern Mediterranean. The USA backs Israel while Greece provides political and logistical support. Türkiye redirects military and diplomatic resources southwards, restricts American access to selected facilities and suspends participation in parts of NATO planning. A Western Balkan academic predicts that such a war could “spell potentially the end of NATO.” The alliance no longer provides a common strategic framework. Türkiye is consumed by its own war as tensions in Kosovo and Bosnia break into open crises.

Economic breakdown transfers power to the networks controlling scarce goods, money and movement. Shortages increase profits from fuel, medicines, hard currency, electronics and dual-use components; migrant smuggling provides another revenue stream. Criminal organisations linking Türkiye, the Black Sea and Western Balkans supply public institutions and legitimate businesses while expanding illicit markets. They penetrate customs agencies, police forces and governing parties. Officials come to depend on organisations they nominally police for access to goods, capital and migration routes, producing what a representative of a Bosnian civil society organisation calls “private networks and opportunistic arrangements.”

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Northern Kosovo becomes a hub for these informal and illicit networks. The Serb-majority municipalities already contain parallel institutions and smuggling networks, while the 2023 Banjska attack demonstrated their capacity for organised armed violence. By 2029, these networks extend through Serbia, Montenegro and Bosnia and into wider sanctions-evasion systems. Armed groups acquire money, drones and weapons; the Serbian government becomes partly dependent on networks it had previously tolerated for political purposes. A Kosovo police campaign against warehouses, transport companies and armed organisations meets coordinated resistance across several municipalities. Fighting lasts for weeks, KFOR suffers casualties and Serbia mobilises at the boundary. Albania becomes Kosovo's principal regional logistical supporter after Türkiye turns south. KFOR prevents direct Serbian-Kosovan war but cannot re-establish civilian authority across the north. As a Kosovan geopolitical analyst puts it, “the fear of conflict is real and constant, but there is nobody to call.”

Bosnia and Herzegovina begins to break apart through its finances. Recession and refinancing difficulties threaten pensions and public-sector salaries. Republika Srpska challenges the Indirect Taxation Authority and its single-account system, establishes parallel collection mechanisms and deploys entity police to prevent state enforcement. Serbia provides energy and political support but cannot cover the deficits. Croat-majority cantons ring-fence revenues and public-company income, while HDZ BiH demands greater fiscal and institutional autonomy. State agencies miss salaries and the administration of common infrastructure fragments between competing authorities. Political actors become, in one expert's words, “dependent on patronage systems, identity-based mobilisation and transactional alliances.” Fiscal disintegration gives Republika Srpska the machinery for eventual secession.

Russia can no longer maintain all of the peripheral dependencies built around its regional power. Mobilisation, military production and domestic security divert money and administrative capacity away from Transnistria. Intermittent supplies of subsidised energy leave much of the enclave's remaining industry unviable and erode government revenues. Moldova accelerates economic reintegration; Transnistrian elites resist and criminal networks expand. Russian financial support to Abkhazia becomes less reliable. Disputes with Russia over property, investment and political control intensify. In South Ossetia, deeper institutional integration gives Russia greater direct control even as its capacity to subsidise more autonomous dependencies contracts. As a Western Balkan academic specialised in geopolitics puts it, “there is no external power that will sort their internal politics.” Russia fights harder in Ukraine while concentrating its diminishing capacity on the peripheral positions it can most easily control.

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By 2030–31, regional crises persist because no external actor has both the capacity and the incentive to manage them over time. Intervention becomes episodic: governments protect specific assets, borders or clients, then withdraw once their immediate interests are secured. Institutions through which the EU and USA once managed regional crises lose the political and material backing that made them effective. One expert describes the result: “The region does not become a geopolitical battleground. It becomes redundant.” The vacuum is not an absence of foreign power. It is the disappearance of sustained responsibility for regional order.

Where the pathway could diverge

This macroscenario has the thinnest human evidentiary base of the eight clusters. Eight human selections were classified within Regional Vacuum, supplemented here by two borderline cases that contain closely related dynamics and enrich the evidentiary set. Nine synthetic selections fall within the cluster. Human responses range from controlled external drawdown to global war and nuclear escalation. Synthetic responses mostly weaken existing relationships without envisaging comparable systemic rupture. Constructing the pathway therefore requires more extrapolation than elsewhere. Its plausibility is low because several disruptions must coincide or follow one another closely, although none is implausible on its own. As an analyst from a think-tank focused on the Eastern Neighbourhood puts it, under sufficient disruption “the terms in which we speak about the region now, don't apply to the future.”

Systemic crisis need not produce Regional Vacuum. A Kosovan geopolitical analyst envisages “the most disorienting regional environment […] not because external actors are actively hostile and fight to extend their influence, but because they are simply absent and disengaged.” Another introduces “three nuclear global powers (US, Russia, China) […] that compete chaotically, while regional powers withdraw.” A Western Balkan academic envisages “a new type of nuclear world war, in which the EU has been de facto occupied by the US,” yet also anticipates stronger EU integration under a US-led coalition. Another imagines external retrenchment producing a “respiration period” in which governments turn towards domestic consolidation after narrowly avoiding catastrophe, with the EU accession path remaining open. Elsewhere, the EU responds by “putting a hard border on the Western Balkans and Eastern Partnership countries and merely treating them as shields from migration.” These responses point to very different outcomes: neglect, chaotic competition, wartime hierarchy or renewed coordination. Regional Vacuum requires external powers to continue intervening without recovering the capacity for sustained regional crisis management.

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The accumulation and timing of shocks are the principal constraints on plausibility. Human experts envisage global recession, energy disruption, AI-driven economic change, conflict over Taiwan, a Türkiye-Israel war, migration shocks and nuclear escalation, but no response reproduces their sequence here. A Ukrainian think-tank analyst comes closest by combining recession with "AI-enabled radical reshaping of global economy and labour domains" and China pursuing a "small victorious war" against Taiwan to channel domestic pressures. A Bosnian civil society representative argues that disorder on this scale would require "a major transformation of the global order, a severe economic crisis affecting all major economies simultaneously, or large-scale natural or human-made catastrophes." Not every crisis needs to reach its extreme form, but they must arrive quickly enough to prevent governments and alliances from rebuilding capacity. Longer intervals or successful containment break the cascade.

Reduced external constraint could strengthen local predation or force greater self-reliance. A Kosovan geopolitical analyst expects that "what fills the vacuum is not a new external power but local elites operating without constraints for the first time in decades." Their bilateral arrangements are "built on mistrust, competitive grievance, and the ever-present possibility that a neighbour's weakness is an opportunity." Another analyst, from a think-tank specialised in security and the Western Balkans, describes regional "Mexican-style cartelisation," as criminal and patronage networks assume functions of weakened states. Large crises can also overturn existing political networks, as the Bosnian civil society representative explains: "crises of this scale often create opportunities for opportunistic actors and elite restructuring." Other responses reverse the logic. A Bosnian academic imagined that candidate states may conclude that "they have to do it themselves," encouraging cross-border cooperation, while scarcer external finance "can result in more accountable and more transparent governance." The pathway assumes that incumbent networks exploit weakened constraints before new forms of cooperation can take hold.

Regional Vacuum also depends on Russia, China and Türkiye being unable to fill the gap. The Ukrainian think-tank analyst expects Russia to "solidify repressive control" and wage war "against NATO" to channel domestic pressures.. A Western Balkan academic sees "Russia […] depleted from the Ukraine war [while] China calmly sits on the sideline." China ranges elsewhere from residual actor to regional order-setter, while Türkiye ranges from retrenchment to regional leadership. The pathway combines Russian exhaustion at the periphery, Chinese concentration on East Asia and Turkish preoccupation with the Middle East. If one retains sufficient capacity to impose durable constraints on candidate-state choices, the trajectory

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moves towards Alternative Order. Continued competition without such hierarchy instead points towards Competitive Disorder.

Declining crisis-management capacity does not determine how individual disputes develop. The pathway pushes northern Kosovo towards sustained armed confrontation, but the Kosovan geopolitical analyst imagines a quieter failure: “The wild card is not that Kosovo fails dramatically, it is that it simply becomes too small, too complicated, and too peripheral to save.” Bosnia and Herzegovina could remain dysfunctional without crossing into fiscal and territorial fragmentation. The region could instead become “a proxy-war setting between rivaling global powers and their local proxies.” Regional Vacuum persists to 2031 only if repeated crises prevent candidate governments and foreign powers from rebuilding effective crisis-management capacity.

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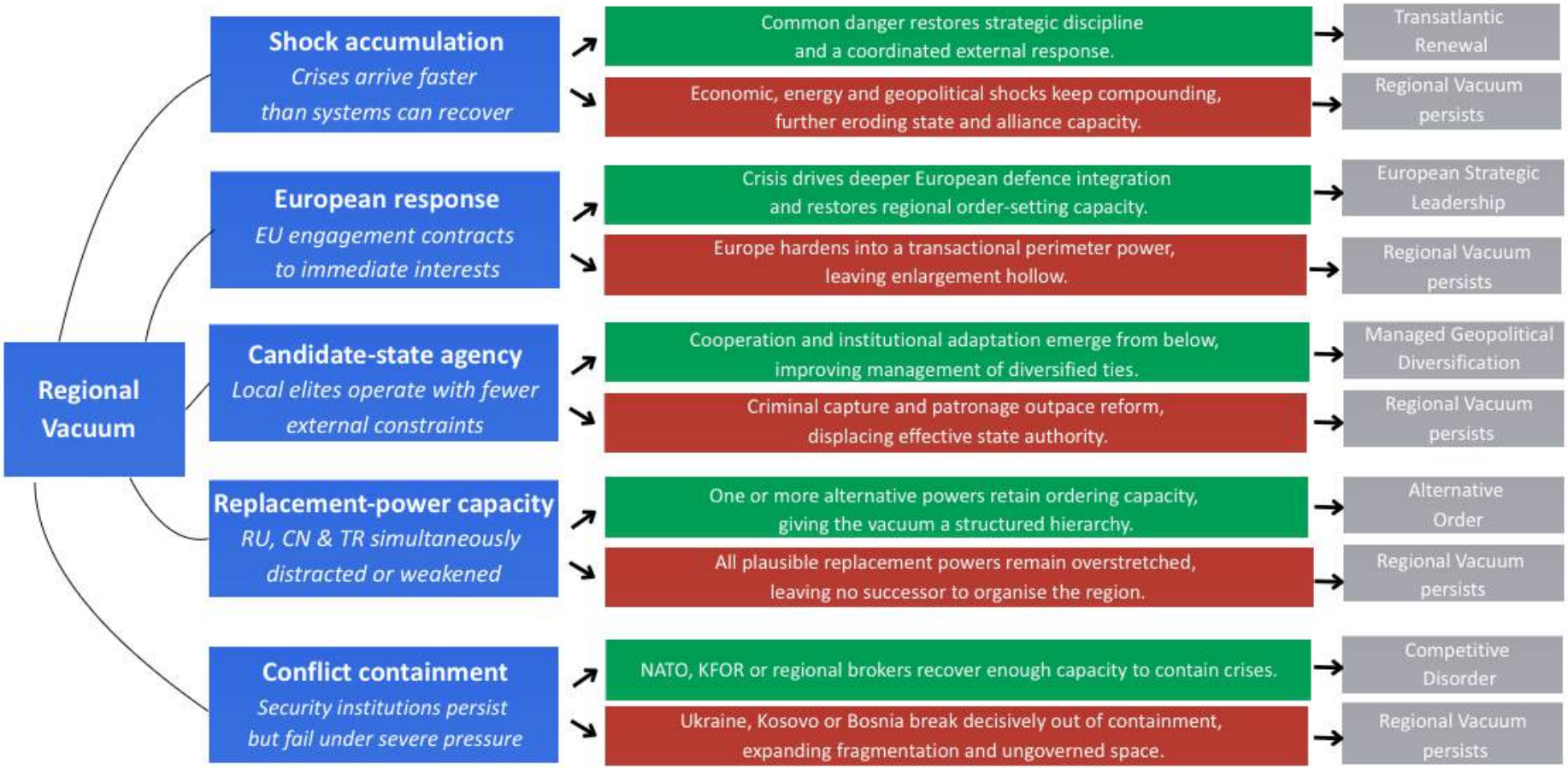
Figure 13: Divergence Tree (Regional Vacuum)



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CONCLUSION | Cross-Scenario Findings

What persists across different regional orders

Similar levels of integration and external engagement produce very different regional orders across the eight macroscenarios. Five findings explain why.

1. **European economic predominance can outlive EU-centered neighbourhood order**

The EU's structural predominance is among the most resilient features across the macroscenarios. Even where enlargement stalls, political cohesion weakens or other powers gain influence, the candidate neighbourhood remains deeply connected to the EU through **trade, finance, regulation, infrastructure and labour mobility**. **None of the macroscenarios requires another external actor to displace the EU economically.**

That predominance can conceal substantial political change. Under **Procedural Enlargement**, dense integration underpins a shallow EU-centred order. Under **Managed Geopolitical Diversification**, the most frequently selected baseline, much of the same integration persists even as candidate governments hedge more systematically and EU political primacy weakens. Trade shares, funding volumes, regulatory approximation and even accession negotiations can remain robust after their political meaning has begun to change.

Declining EU-centred order need not produce a coherent successor. Alternative Order combines Russian security constraints, Chinese technological and infrastructural leverage and Turkish protection of selected partners. Hierarchy strengthens within particular relationships without producing a single regional hierarchy.

EU structural predominance can therefore survive a substantial loss of political primacy before conventional measures of integration register the change.

2. **Integration can transform political incentives or entrench the systems it is meant to change**

Integration before membership has no fixed political effect. Under **Differentiated Enlargement**, tangible rewards for reform and successful accessions demonstrate that intermediate integration forms part of a credible path to membership. Conditionality gains force

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because politically costly compliance changes a state's prospects. **Procedural Enlargement** produces a different equilibrium: governments obtain substantial benefits from integration without undertaking reforms that threaten established political and economic interests.

Security alignment and geopolitical importance can shield governments from reform pressure. Procedural Enlargement, Transatlantic Renewal and **European Strategic Leadership** variously show how EU-linked investment, infrastructure and funding can strengthen incumbents that remain useful on migration, security, connectivity or regional disputes. Enlargement can then generate a perverse feedback in which integration strengthens incumbents, incumbency weakens transformative reform, and selective compliance preserves access to integration benefits.

Credible accession changes the calculation. Accession by a technically prepared frontrunner such as Montenegro demonstrates that costly compliance can alter a state's political position. Indefinite postponement turns the benefits available before membership into a destination of their own.

Progress towards membership also threatens interests protected by an inconclusive accession process. Differentiation widens the distance between frontrunners and laggards. Nationalist actors, illiberal incumbents, patronage networks and protected businesses have more to lose as the costs of non-compliance rise and geopolitical options narrow. **Successful conditionality can provoke backlash precisely where it begins to alter established political incentives.**

3. American power matters through what it reinforces, disrupts or leaves behind

The USA matters far beyond its economic weight in the neighbourhood because its security power can reinforce EU-centred order, disrupt it or recede faster than European capabilities can replace it.

Under **Transatlantic Renewal**, renewed US engagement reinforces EU order-setting capacity without restoring the old division of labour. European NATO members carry more of the defence burden, while the USA again supplies capabilities and guarantees they cannot fully replace. Deterrence, intelligence, sanctions and financial enforcement give strategic weight to enlargement, regulation and market access. **European Strategic Leadership** reaches a similarly consolidated regional order without a US return because European defence cooperation develops quickly enough to replace much of the lost capacity.

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Competitive Disorder shows that continued US engagement can be more destabilising than withdrawal. The USA treats weapons, intelligence, technology access and bilateral security guarantees as instruments for extracting political and commercial concessions, undercuts common EU positions and deals directly with candidate governments on terms that conflict with EU policy. In **Regional Vacuum**, US priorities elsewhere deprive the neighbourhood of sustained American crisis-management capacity.

Sequence matters. If European NATO members and the EU develop the necessary capabilities quickly enough, US retrenchment can accelerate strategic consolidation. If American guarantees weaken first, candidate governments have stronger incentives to seek additional security relationships and other powers gain opportunities to test weakened guarantees. A capable European security architecture in 2031 offers limited reassurance if regional actors concluded several years earlier that existing guarantees could not be enforced.

4. **Order changes candidate-state agency rather than simply suppressing it**

Ukraine and Serbia retain unusual room for manoeuvre across otherwise very different macroscenarios, but for opposite reasons. Ukraine's agency is primarily capability-based. Its military experience, defence-industrial and technological capacity, strategic location and importance to European security make it valuable to the order into which it is being integrated. Even under a stronger EU-centred order, Ukraine retains substantial bargaining leverage.

Serbia's agency is more positional and disruptive. Its economic weight, regional networks, influence over Kosovo and Republika Srpska and strategic resources give it considerable bargaining weight. **Serbia can also derive leverage from its ability both to generate instability and to contain it.**

Candidate states exercise agency through capabilities that make them valuable to other actors within an order, positional leverage, hedging among external relationships, or the ability to impose costs through obstruction. EU membership sharply raises the costs of pursuing some external policies incompatible with the Union, but creates institutional leverage inside the EU while leaving considerable latitude over many external relationships.

Under **Managed Geopolitical Diversification**, external relationships remain sufficiently compatible for governments to diversify among them. **Competitive Disorder** makes those relationships harder to compartmentalise. Defence procurement bears on intelligence access; technological choices on data and security relationships; energy ties on sanctions and financial

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arrangements. Previous choices narrow the range of affordable subsequent choices. Under **Alternative Order**, some relationships harden into dependencies that are costly to exit.

Neither formal alignment nor the number of available partners reliably indicates how much agency a candidate state possesses. States can retain considerable room for manoeuvre inside an order and lose it through diversification if accumulated dependencies make alternative choices too costly.

5. **Successful crisis management can reproduce instability**

A crisis can end while leaving the regional order less capable of managing the next one. Under **Competitive Disorder**, confrontations in Kosovo and Bosnia and Herzegovina are repeatedly contained through external intervention, but settlements leave behind additional weapons, bilateral guarantees, parallel institutions or incentives to use brinkmanship again.

Crisis does not require open conflict with external actors. Reliance on incumbents to control migration, deliver agreements or suppress instability can make them more valuable to external actors while weakening pressure to change the political systems generating those vulnerabilities. Crisis management then reproduces the conditions that make further crisis management necessary.

Greater hierarchy offers no guarantee of stability. Under **Alternative Order**, stronger external constraints and patron-client relationships can generate violence as competing hierarchies collide, local actors exploit external protection, and attempts to impose new territorial or security arrangements meet resistance. **Stronger hierarchy can coexist with greater coercion and violence.**

Dismantling destabilising arrangements can itself trigger escalation. Political networks can lose external protection or access to rents; familiar avenues for geopolitical balancing can close; Russian clients can become more confrontational as Russia's capacity to protect them declines. In Serbia or Republika Srpska, actors facing a permanent loss of leverage have incentives to obstruct or escalate while they still can.

The immediate level of violence is therefore a poor measure of regional ordering capacity. Regional Vacuum exposes the opposite limit: successive shocks exhaust the capacity to contain crises at all.

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Human and synthetic scenarios: similar outcomes, different pathways

Human experts and synthetic personas often produced similar broad patterns of regional order.

- Baselines in both sets clustered around Managed Geopolitical Diversification and Procedural Enlargement/
- Preferred scenarios concentrated on Transatlantic Renewal and European Strategic Leadership.
- Nightmares centred on Alternative Order and Competitive Disorder.
- Existing differences widened under Wild Cards. Human experts more often produced Alternative Order, while synthetic personas favoured Competitive Disorder, reinforcing differences already visible in their treatment of candidate-state agency and regional exposure. Some variation may also reflect the professional, thematic and regional composition of the two samples rather than reasoning style alone.

Similar classifications could nevertheless encompass quite different responses. Synthetic personas clustered more tightly around a smaller number of categories. Human experts used a wider range of framings, including where their scenarios were ultimately assigned to the same macroscenario. This affects the interpretation of pooled results. An overall majority can reflect a strong concentration among synthetic personas without indicating equivalent agreement among human experts. Macroscenario distributions consequently obscure some of the variation within and between the two sets.

Geopolitical conditions carried different causal weight in the two sets. Synthetic personas more often derived regional and candidate-state outcomes directly from external actor postures. **Human experts gave greater weight to domestic institutions, incumbent interests and elite strategies** in determining how those conditions played out. Candidate-state agency was correspondingly more consequential in the human material, although it did not necessarily favour integration or stability. Governments could pursue accession and reform, resist conditionality, protect rents or hedge among competing partners.

Candidate-state choices could also reshape the regional configuration. Access to alternative finance, energy relationships and political support could weaken EU leverage. Fragmented EU and US engagement could widen the space for hedging, while credible accession incentives and dependable security commitments could narrow it. Governments could thereby affect the leverage and behaviour of external actors as well as respond to them. The scope and form of this agency also varied by region. **Western Balkan governments generally had greater latitude**

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to combine competing relationships. War, occupation, Russian coercion and security dependence imposed tighter constraints in the Eastern Partnership. Regional composition could therefore reinforce differences between the human and synthetic sets.

The two groups also differed in the pace and discontinuity of the changes they envisaged. Synthetic personas generally produced more continuous trajectories in their treatment of US disengagement, Russia's trajectory and Nightmare scenarios, in particular. Human experts more readily envisaged abrupt withdrawal, disruptive responses to declining power and other ruptures. Their responses also allowed an actor's structural position and political influence to move apart. EU centrality could persist alongside weak political leverage, Russian decline alongside continued disruption, and Chinese economic engagement without regional order-setting. Human scenarios therefore left greater scope for relationships established at the outset to change substantially over the scenario period.

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ANNEX A: The Sample for the Structured Expert Elicitation Survey

This annex provides further documentation of the strategic foresight methodology described in the main report. It covers the design and implementation of the structured expert elicitation, the evidence used to establish conditions in 2026, the human and synthetic samples, the generation of the synthetic expert personas, the clustering of scenario responses, the posture framework, and the development of the eight macroscenarios.

A.1 Elicitation design and data flow

The structured expert elicitation was designed to compare expert judgements about developments that are uncertain, difficult to quantify and dependent on interactions among political actors. Respondents worked individually within a common framework rather than deliberating collectively. The resulting responses constitute structured expert judgements rather than statistical estimates.

Data were collected between 10 April and 16 September 2026 through a standardised 80-question online survey administered using Zoho Survey. The elicitation had two stages. First, respondents selected the posture they considered most plausible for each of the five external actors by 2031 (Annex B). Second, they constructed four configurations corresponding to the four scenario types shown in Table 5. For each configuration, respondents described the resulting regional order, considered its implications for the candidate-state neighbourhood and their principal country or thematic area, and assigned a plausibility band ranging from very low to very high.

Scenario type	Respondents were asked to describe
Baseline	The future they considered most plausible
Preferred	The future they considered most desirable
Nightmare	The future they considered most undesirable
Wild card	A disruptive or unexpected development and its consequences

Table 5: Scenario types. "Preferred" and "nightmare" reflect respondents' own views, not the preferences of the EU or the authors.

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Stage	Human experts	Synthetic personas
Invited / generated	45	45
Maximum scenario responses (45 x 4)	180	180
Completed the survey (respondents analysed)	45	45
Entries completed	175	180
Baseline responses	45	45
Preferred responses	44	45
Nightmare responses	43	45
Wild card responses	43	45
Entries excluded, with reason	5	0
Entries analysed	175	180
Total entries analysed	355	

Table 6: Reconciliation of respondents and scenario entries

A.2 Data sources for baselining

Country profiles. Profiles of the nine candidate states were prepared using consortium expertise, desk research and GEO-POWER-EU data, and reviewed by country specialists. They follow a common structure: domestic agency; geopolitical relationships and interdependence; exposure to external pressure; and strategic assets. These are treated as starting conditions rather than fixed national characteristics, since each may change over the course of a scenario. Concise summaries of the country profiles are provided in Annex C.

Interdependence Database. Built on publicly available data, the database maps political, security, economic and societal links between the nine candidate states and the five external actors from 2008 to 2025.

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Indices. Three indices, based on structured expert assessment, provide an interpretive layer. The *Interdependence Index* captures the breadth and intensity of relationships; and the *Exposure Risk Index* assesses the channels through which external pressure or disruption may be transmitted.

These sources informed the scenarios without determining them. Strong interdependence does not necessarily imply vulnerability: a candidate state may have extensive ties with an external actor while retaining alternatives and room for manoeuvre, whereas a narrower relationship concentrated in a critical sector with few substitutes may create acute vulnerability.

A.3 The sample of experts

The exercise drew on 45 human experts, who provide the primary evidence, and 45 synthetic expert personas used as a controlled comparator. This section describes the composition of the two samples by professional background, area of expertise and regional focus. Differences in their composition are relevant when interpreting differences between the human and synthetic responses.

Selection and recruitment

Human experts were selected purposively for demonstrated expertise in European geopolitics, EU enlargement or security, and in the Western Balkans or the three Eastern Neighbourhood candidates. They were not required to be nationals or residents of the countries they assessed, and many cover several countries. Selection sought to combine subject expertise and regional knowledge with a range of professional backgrounds. Recruitment ran through the professional and institutional networks of the GEO-POWER-EU partners. This facilitated access to relevant specialists but may have introduced network and selection effects, including uneven representation across professional backgrounds and areas of expertise.

Synthetic personas were not recruited but specified. Each was assigned a combination of professional background, regional focus and analytical perspective, designed in part to cover profiles that are thin in the human sample. Their profile distribution is therefore a design choice, not a finding (A.4).

Professional background

The human sample is concentrated in the research sector. Think tanks, research institutes and academia together account for 35 of the 45 experts. Policy and government, business, civil society and international organisations are represented much more sparsely. The synthetic

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personas have a deliberately different professional distribution, with greater representation of policy and government, civil society and commercial backgrounds.

Professional background	Human (n)	Human (%)	Synthetic (n)	Synthetic (%)
Think tank / research institute	20	44.44	8	17.78
Academia	15	33.33	1	2.22
Policy / government	3	6.67	13	28.89
Commercial firm	3	6.67	7	15.56
Civil society	2	4.44	10	22.22
International organisation	1	2.22	5	11.11
Other / mixed	1	2.22	1	2.22
Total	**45**	**100.00**	**45**	**100.00**

Table 7: Professional background of respondents. Source: Zoho Survey records.

Areas of expertise

Respondents could select more than one area of expertise, so percentages do not sum to 100. In the human sample, regional or country expertise and external influence or geopolitics were the most commonly reported areas. Governance and rule of law, security and defence, and civil-society or social dynamics were also represented, while economy and investment and energy and the green transition were less common. The synthetic sample was more evenly distributed across the thematic categories.

Area of expertise (multiple answers)	Human (n)	Human (%)	Synthetic (n)	Synthetic (%)
Regional / country expertise	35	**77.78**	11	**24.44**
External influence / geopolitics	28	**62.22**	17	**37.78**
Governance and rule of law	15	**33.33**	16	**35.56**
Security and defence	13	**28.89**	10	**22.22**

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Area of expertise (multiple answers)	Human (n)	Human (%)	Synthetic (n)	Synthetic (%)
Civil society / social dynamics	12	**26.67**	13	**28.89**
Economy and investment	6	**13.33**	16	**35.56**
Energy and green transition	2	**4.44**	6	**13.33**
Other	2	**4.44**	0	**0.00**

Table 8: Areas of expertise. Counts derived from Zoho percentages (base 45 in each group)

This contrast is analytically important. The human evidence is strongest on the regional and geopolitical dynamics at the centre of the macroscenarios, and weakest on economic and energy questions. These differences in composition should be taken into account when comparing the human and synthetic responses. In particular, differences concerning economic or energy dynamics cannot be attributed to human–model differences alone when those areas are represented differently in the two samples.

Gender

Of the 43 human experts who disclosed their gender, 22 were women and 21 were men. Two did not disclose their gender. Gender was not used as an attribute in constructing the synthetic personas.

Implications for the findings

The composition of the human sample should be taken into account when interpreting the findings. Respondents are concentrated in research institutions and in regional, geopolitical and governance expertise, while economic, energy, business and policy perspectives are less strongly represented. The prominence of geopolitical and institutional drivers in the scenario responses may partly reflect this composition. The synthetic sample has a different distribution of professional and thematic profiles, but as a model-generated comparator it does not substitute for human expertise in areas that are less well represented.

A.4 Synthetic personas

Status. Synthetic expert personas are AI-generated profiles designed to simulate how respondents with specified professional, regional and thematic characteristics might answer the survey. They are not treated as a second expert population, but as a controlled comparator.

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Because all personas used the same underlying survey model, they are not independent sources of evidence. Similarities among their responses may therefore reflect characteristics of the model as well as the scenario logic under consideration.

Construction and generation. The Bulgarian company Identrics developed an in-house system to generate the synthetic responses. Each persona began with a profile specifying characteristics including professional background, geographic focus, thematic expertise, key perspectives, ideological orientation, information sources and analytical framework. These profiles were developed into more detailed dossiers describing how each persona would assess evidence and interpret the five external actors. The dossiers were generated individually by a separate reasoning model according to a common methodology and were then supplied to the survey model when generating responses.

The survey itself was completed using an in-house tuned version of Qwen2.5-14B-Instruct hosted on Identrics' local infrastructure. Questions were processed individually and in the same order as in the human survey. Each question was treated as a separate interaction, without conversational history from preceding questions. Prompts followed a fixed structure and included the relevant persona dossier and survey material. The model had no access to web retrieval or other external information. Where the survey required selection from predefined postures or other answer options, responses were restricted to those options; free-text responses followed the same 600-word limit applied to human respondents.

Parameter	Specification
Developer and infrastructure	Identrics in-house system, hosted on local on-premise hardware
Survey model	In-house tuned, 8-bit quantized Qwen2.5-14B-Instruct
Context window	65,536 tokens
Persona construction	Profiles specifying professional, regional and thematic characteristics were developed into individual dossiers describing analytical perspectives, objectives and interpretations of the five external actors
Dossier generation	Generated individually by a separate frontier reasoning model using a fixed methodology

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Parameter	Specification
Survey execution	Questions processed individually and in survey order; each model call stateless, without conversational history
Prompt structure	Fixed structure incorporating the persona dossier and relevant survey material
External information	No web retrieval or access to external information during survey execution
Response constraints	Closed questions restricted to the survey's predefined options; free-text responses limited to 600 words
Number of personas	45
Responses analysed	180

Table 9: Synthetic-persona generation protocol

Use. Synthetic responses were analysed separately from human responses and were not treated as equivalent evidence. They provided a controlled comparator against which patterns in the human responses could be examined. Their different distribution of professional and thematic profiles also allowed comparison with perspectives less strongly represented in the human sample.

Limitations. All synthetic personas share the same underlying survey model and may therefore reproduce common biases and reasoning tendencies. The personas also simplify professional and regional perspectives that are heterogeneous in practice and may generate plausible but unverified claims. They do not represent the groups described by their profiles. A persona designed to approximate a Western Balkan civil-society expert provides a model-generated simulation of that perspective, not evidence of what Western Balkan civil-society experts believe.

A.5 Clustering and audit trail

Scenario responses were analysed according to the form of regional order they described rather than the external-actor postures from which they began. The analysis considered the principal assumptions and drivers, relationships among external actors, candidate-state strategies, the EU's position and the resulting security and political environment. Responses describing similar regional dynamics were grouped inductively into eight scenario families. Identical external-actor

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postures were neither necessary nor sufficient for two responses to be placed in the same family, and substantive variation within each family was retained.

Each of the 355 scenario responses was assigned to a single family. When the eight families were subsequently developed into macroscenarios, however, the evidentiary base was not treated as wholly exclusive. For families supported by relatively few responses, relevant material from borderline cases assigned to adjacent families could also be used where the underlying dynamics were sufficiently simila to be transferable. This broadened the range of evidence available for constructing thinner macroscenarios without changing the original classification or counts.

Question	Procedure
Who analysed the responses?	The lead author reviewed and classified all scenario responses. A second researcher contributed to the analysis and development of the scenario families.
How were responses compared?	Responses were compared according to the regional order they described, including the main drivers and assumptions, relationships among external actors, candidate-state strategies, the EU's position and the security environment. The initial configuration of external-actor postures did not determine classification.
How were family boundaries set?	Families were developed iteratively as recurring similarities and differences across the responses were identified. Boundaries were refined as further responses were assessed, including by merging or distinguishing clusters where their underlying regional logic was insufficiently or meaningfully distinct.
Could a response belong to more than one family?	No. Each response was assigned to a single family according to its dominant regional logic. These exclusive assignments were used for the scenario counts and distributional analysis.
How were borderline cases handled?	Borderline responses were assigned to the family that best represented their dominant regional logic. Where a family had a relatively thin evidence base, relevant material from borderline cases assigned to adjacent families could also inform the construction of the macroscenario. This did not alter their formal family assignment or the reported counts.

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Question	Procedure
Were human and synthetic responses treated as equivalent evidence?	No. Both sets were classified using the same analytical framework, allowing their distributions to be compared, but human and synthetic responses were recorded and analysed separately. Synthetic responses were treated as a controlled comparator rather than equivalent expert evidence.
Who analysed the responses?	The lead author reviewed and classified all scenario responses. A second researcher contributed to the analysis and development of the scenario families.

Table 10: Audit trail for the clustering stage

Table 11 below shows the distribution of human responses across families and scenario types, alongside the total number of synthetic responses and the number of synthetic baseline responses in each family. The distribution varies considerably. Competitive Disorder (MS7), for example, appears among human responses as a baseline, nightmare and wild-card scenario. Differentiated Enlargement (MS3) appears predominantly in the human material, while Regional Vacuum (MS8) has the smallest human evidence base. The divergence section of each macroscenario discusses relevant variation within its underlying family.

Macroscenario family	Baseline		Preferred		Nightmare		Wild card		Total	
	H	S	H	S	H	S	H	S	H	S
MS1 Procedural Enlargement	13	9	1	0	0	0	0	1	**14**	**10**
MS2 Managed Geopolitical Diversification	17	12	3	5	0	0	5	6	**25**	**23**
MS3 Differentiated Enlargement	6	0	5	0	0	0	0	1	**11**	**1**
MS4 European Strategic Leadership	0	5	12	3	0	3	4	3	**16**	**14**
MS5 Transatlantic Renewal	1	9	23	36	0	1	3	2	**27**	**48**
MS6 Alternative Order	0	0	0	1	23	25	18	4	**41**	**30**
MS7 Competitive Disorder	7	10	0	0	16	12	10	23	**33**	**45**
MS8 Regional Vacuum	1	0	0	0	4	4	3	5	**8**	**9**
Total	**45**	**45**	**44**	**45**	**43**	**45**	**43**	**45**	**175**	**180**

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Table 11: Distribution of entries by family and scenario type (H = human, S = synthetic)

A.6 Rationale and limits of the posture framework

Applying the same two dimensions to five different external actors makes their postures comparable, but necessarily simplifies differences in how each exercises influence. Internal alignment and breadth of engagement therefore have actor-specific meanings. Table 11 sets out how the dimensions were interpreted and the main limits of the comparison.

Table 12: Actor-specific interpretation and limitations of the posture dimensions

Actor	Internal alignment means…	Regional order-setting means…	Where the analogy strains
EU	Consensus among member states and institutions, constrained by unanimity in enlargement and foreign policy	Enlargement, regulation, market access and funding	Fragmentation is constitutional and visible; influence relies on law and markets rather than coercion
USA	Coherence between executive, Congress and agencies, and continuity across administrations	Security guarantees, NATO, sanctions and financial leverage	Alignment can shift abruptly with elections; a highly aligned administration may pursue retrenchment
China	Coordination among party-state, financial institutions and firms, under economic and fiscal constraints	Infrastructure finance, investment, technology and standards	Internal contestation is hard to observe; the region is a secondary theatre, so order-setting is rarely the aim
Russia	Elite cohesion and the fiscal and military capacity to sustain a strategy	Military power, energy leverage, political networks and hybrid activity	Capacity to disrupt can persist without capacity to order; fragmentation may surface suddenly
Türkiye	Consistent presidential direction backed by economic and fiscal capacity	Defence cooperation, connectivity, trade, brokerage and cultural networks	Personalised decision-making blurs alignment and leadership

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Actor	Internal alignment means…	Regional order-setting means…	Where the analogy strains
			preference; ambitions differ by subregion

Where a posture fits an actor imperfectly, the macroscenario narratives describe its behaviour in actor-specific terms. The framework provides a common basis for comparison; it does not imply that the five actors exercise influence in equivalent ways.

A.7 From families to macroscenarios

The 1,024 possible combinations of external-actor postures define the theoretical space from which respondents constructed their scenarios. The elicitation showed which configurations respondents selected and, more importantly for the subsequent analysis, which forms of regional order recurred across their written responses. The inductive analysis described in A.5 produced eight scenario families.

Each family was then developed by the authors into a macroscenario. The resulting narratives identify the assumptions, developments and inflection points through which a particular regional order could emerge by 2031. They draw on the underlying responses but do not reproduce or mechanically aggregate them. As described in A.5, relevant material from borderline responses assigned to adjacent families could also inform a macroscenario where its core evidence base was relatively small. Events are included where they materially affect a trajectory; their absence from another macroscenario does not imply that they could not occur there.

Macroscenarios are grouped according to the scenario type with which they were most strongly associated in the human responses. Within these groups, larger families are generally presented first. Procedural Enlargement (MS1) is the exception: although Managed Geopolitical Diversification (MS2) contains more human baseline responses, MS1 is presented first because it represents the more direct continuation of the conditions described in Strategic Context in 2026. Presentation order does not indicate probability. The plausibility rating attached to each macroscenario reflects the pattern of human assessments within its family.

A.8 Human and synthetic responses compared

As described in A.4, the synthetic responses provide a controlled comparator rather than a second source of expert evidence. The comparison therefore identifies similarities and

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differences between the two sets of responses; agreement between them does not constitute independent corroboration.

Several broad patterns recur in both sets. Baseline responses are concentrated in Procedural Enlargement (MS1) and Managed Geopolitical Diversification (MS2), while preferred responses are concentrated in European Strategic Leadership (MS4) and Transatlantic Renewal (MS5). Nightmare responses are concentrated in Alternative Order (MS6) and Competitive Disorder (MS7). Wild-card responses are more dispersed. Among human experts, Alternative Order is the largest wild-card family, whereas synthetic responses are concentrated more heavily in Competitive Disorder.

There are also substantial differences in the distribution of individual families. Differentiated Enlargement (MS3) is almost exclusively represented in the human material, with eleven human responses and one synthetic response. Transatlantic Renewal shows the opposite pattern, with 27 human and 48 synthetic responses. The difference is particularly marked among preferred scenarios: 23 human experts selected a trajectory subsequently classified as Transatlantic Renewal, compared with 36 synthetic personas. Nine synthetic personas also generated Transatlantic Renewal as a baseline, compared with one human expert. These differences are obscured if the two sets are pooled.

The written responses also differ in some of their reasoning. Human experts more frequently gave domestic institutions, incumbent interests and candidate-state strategies an independent role in shaping outcomes rather than deriving them directly from the external-actor configuration. Candidate-state agency did not necessarily favour integration or stability: governments could pursue reform and accession, but could also resist conditionality, protect incumbent interests or maintain relationships with several external actors. Synthetic responses more often followed the implications of the specified external-actor postures directly.

Human responses also contained sharper discontinuities in some areas. Abrupt changes in US engagement, disruptive Russian responses to declining capacity and sudden deterioration in regional security appeared more readily in the human material, while synthetic responses more often described incremental changes in actor behaviour. Human experts also more readily separated an actor's structural position from its immediate political leverage. The EU could remain structurally predominant while exercising limited influence over candidate-state governments; Russia could lose capacity while retaining significant disruptive power; and Chinese economic engagement did not necessarily entail an attempt to shape regional order.

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These differences should be interpreted cautiously. The human and synthetic samples differ in professional background and thematic expertise, while all synthetic personas share the same underlying survey model. The comparison therefore cannot isolate differences between human and model reasoning from differences in sample composition or characteristics of the model itself. Its purpose is descriptive: to show where the two sets generated similar or different patterns under the same survey framework.

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ANNEX B: External Actor Postures

The structured expert elicitation presented respondents with four possible postures for each of the five external actors. Each posture combines one of two conditions of internal strategic alignment (*strategic alignment* or *fragmented alignment*) with one of two approaches to regional engagement (*regional order-setting* or *selective engagement*). The definitions below reproduce the postures used in the expert survey.

European Union:

- **"Proactive Order-Setter" – Strategic alignment × Regional order-setting**
  The EU is internally aligned and treats enlargement and neighbourhood integration as a strategic project, using accession, regulation and funding in a coordinated way to lock in multiple candidate states on a clear, time-bound path towards membership and deep market integration.
- **"Restrained Strategist" – Strategic alignment × Selective engagement**
  The EU is internally cohesive but deliberately narrows its ambitions, keeping accession formally open while capping commitments and refocusing instruments on a few hard priorities such as migration management, energy resilience and infrastructure protection rather than comprehensive transformation.
- **"Technocratic Order-Setter" – Fragmented alignment × Regional order-setting**
  The EU remains the main institutional and regulatory reference point, but internal political fragmentation means enlargement, conditionality and financial tools are deployed unevenly, producing strategic drift and growing doubts in the region about the Union's predictability and credibility.
- **"Reactive Stakeholder" – Fragmented alignment × Selective engagement**
  The EU's long-term order-setting role erodes as sceptical member states block consensus; enlargement stalls, funding is repurposed towards short-term stabilization, and engagement becomes fragmented and crisis-driven, leaving wider regional ordering to other actors or ad hoc coalitions.

USA:

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- **“Regional Security Architect” – Strategic alignment × Regional order-setting**
  The US is internally cohesive and organises a regional security order around NATO and robust bilateral ties, combining sustained deployments, structured security assistance, sanctions and diplomacy to deter adversaries and anchor candidate states firmly in a US-backed security architecture.
- **“Strategic Retrenchment” – Strategic alignment × Selective engagement**
  The US leadership is aligned around a decision to downgrade European regional security as a priority; alliance commitments thin out, engagement becomes episodic and narrowly interest-based, and partners adjust to a predictable but much more limited US role.
- **“Distracted Security Leader” – Fragmented alignment × Regional order-setting**
  The US still aspires to act as security guarantor and uses powerful military and financial tools, but domestic polarisation and institutional friction produce uneven follow-through, abrupt shifts in support and persistent doubts about the durability of American commitments.
- **“Chaotic Withdrawal” – Fragmented alignment × Selective engagement**
  Under growing internal division, the US effectively abandons its security-guarantor role; NATO credibility collapses, forward presence and assistance shrink sharply, and any remaining engagement is ad hoc and transactional, creating a security vacuum others rush to fill.

China:

- **“Regional Order-Shaper” – Strategic alignment × Regional order-setting**
  China brings cohesive party-state, financial and corporate instruments to bear on the neighbourhood, scaling up infrastructure, industrial and digital projects to knit selected candidate states into Chinese-centred corridors and standards that systematically shape their economic trajectories.
- **“Selective Economic Engagement” – Strategic alignment × Selective engagement**
  China remains internally coherent but treats the region as a secondary theatre, focusing on commercially viable projects and targeted sectors; it protects key interests and supply chains without trying to organise the neighbourhood as a whole.
- **“Overextended Expansion” – Fragmented alignment × Regional order-setting**
  Ambition to "do more" in the neighbourhood outpaces China's fiscal and bureaucratic discipline, leading to a proliferation of high-profile projects with uneven financing,

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delays and renegotiations that expand Beijing's footprint but also its exposure, volatility and reputational risk.

- **“Residual Engagement” – Fragmented alignment × Selective engagement**
  Under domestic economic and political strain, China deprioritises the region; existing Belt and Road-type projects are maintained or quietly wound down, new commitments are rare, and engagement focuses on safeguarding sunk assets rather than expanding influence.

Russia:

- **“Consolidated Expansionist” – Strategic alignment × Regional order-setting**
  A cohesive Russia synchronises military power, energy leverage, finance and information operations to enforce a coercive security order in the Eastern Neighbourhood and to deepen disruptive influence in the Western Balkans, actively setting the tempo of regional crises.
- **“Strategic Retrenchment” – Strategic alignment × Selective engagement**
  Russia remains internally cohesive and materially viable but chooses to narrow its footprint, defending core red lines in the Eastern Neighbourhood while accepting more modest, targeted influence and reduced exposure across the wider neighbourhood.
- **“Unstable Expansionist” – Fragmented alignment × Regional order-setting**
  Russia retains revisionist intent and uses force, energy and hybrid tools aggressively, but fiscal stress and elite competition erode coordination, making its interventions more erratic, risk-prone and vulnerable to overreach or self-harming escalation.
- **“Chaotic Withdrawal” – Fragmented alignment × Selective engagement**
  Under severe internal strain, Russia's patronage system and command coherence fray; regional operations are cut back or devolve to poorly controlled intermediaries, and Russia ceases to function as a reliable order-setter even where residual disruption capacity remains.

Türkiye:

- **“Principal Regional Actor” – Strategic alignment × Regional order-setting**
  Türkiye is internally cohesive and deliberately makes the candidate-state neighbourhood a primary arena, combining defence ties, corridor politics, finance and cultural networks

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to act as the leading external reference point for selected Western Balkan and Black Sea partners.

- **“Calibrated Regional Power” – Strategic alignment × Selective engagement**
  Türkiye is strategically aligned but consciously avoids overreach, deepening security and economic partnerships with a few anchor states and key corridors while signalling clear limits to its commitments elsewhere in the neighbourhood.
- **“Overreaching Broker” – Fragmented alignment × Regional order-setting**
  Türkiye attempts to broker and shape outcomes across multiple theatres simultaneously, but domestic political and fiscal fragmentation erode discipline, making its interventions more transactional, inconsistent and vulnerable to miscalculation or backlash.
- **“Regional Retreat” – Fragmented alignment × Selective engagement**
  Internal pressures absorb attention and resources; Türkiye scales back security, diplomatic and economic commitments in the neighbourhood, remaining present but no longer a stabilising or agenda-setting actor, and adjusting to rather than shaping regional dynamics.

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ANNEX C: Summarised Country Profiles

Methodological note

The profiles in this annex summarise a more extensive baselining exercise conducted for each of the nine candidate states. The full baseline profiles assessed conditions in 2026 across four dimensions: domestic agency; external relationships and interdependence; exposure to external pressure; and strategic assets. They drew on country-level research, specialist review and GEO-POWER-EU data, including the Interdependence Database, Interdependence Index and Exposure Risk Index.

The summaries retain the elements most relevant to the foresight exercise. Each identifies the country's external relationships, domestic distribution of political power and principal vulnerabilities, before specifying two drivers that organise the outlook to 2031. The four trajectories that follow illustrate how different combinations of these drivers could affect the country. They are not forecasts or separate macroscenarios, but country-level trajectories used to establish how common changes in the regional environment could produce different outcomes across the candidate states.

Albania

Albania has little geopolitical incentive to hedge between external powers, leaving EU accession primarily a question of domestic transformation rather than strategic alignment. The Interdependence Index places the EU (82/100) ahead of the USA (61), Türkiye (47), China (34) and Russia (25). European markets and institutions dominate economic integration; NATO and the USA underpin security. Adriatic energy and transport routes, and close relations with Kosovo, give Albania regional strategic value.

Political power is concentrated around Prime Minister Edi Rama and the Socialist Party (PS). Four consecutive electoral victories and control of most municipalities give PS extensive influence over administration, public investment and appointments. Opposition weakness limits electoral constraints, but the Special Anti-Corruption Structure (SPAK) investigates senior figures across party lines. Judicial autonomy and EU conditionality constrain an executive closely connected to major business interests.

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Albania's aggregate Exposure Risk Index score of 38/100 masks vulnerabilities concentrated in governance and external dependence. Discretion over concessions, development rights and public land gives foreign investors access through executive relationships. Concentrated media ownership and illicit capital in property weaken accountability. European downturns can affect exports, tourism and remittances simultaneously; drought raises electricity-import costs. Emigration depletes labour and administrative skills, while donor cuts weaken civic oversight. Defence and responses to Iranian cyberattacks depend on allied capabilities.

Two drivers organise the 2026-2031 outlook: the influence of EU accession on government decisions, and the distribution of domestic political power. Membership incentives determine the force of conditionality; judicial independence and electoral competition determine constraints on the executive. EU–USA disagreements and Kosovo–Serbia crises can affect all four trajectories.

1. **Institutional convergence and political pluralisation:** Accession rewards difficult reforms as PS dominance recedes. Stronger competition and autonomous courts make political alternation credible without threatening justice reforms. Albania approaches membership with stronger institutional constraints.

2. **Accession under continued PS dominance:** Negotiations advance and conditionality extracts reforms, but PS retains national and municipal advantages. Prosecutors investigate senior figures, while public employment, procurement and development remain susceptible to governing-party influence.

3. **Entrenched PS rule after EU leverage weakens:** Stalled accession reduces the costs of selective compliance. Pressure on prosecutors, media and civil society increases. PS expands patronage and seeks investment from Türkiye, Gulf states and other partners imposing fewer governance conditions, retaining NATO membership and US security ties.

4. **Breakdown of PS dominance without sustained reform:** Weaker accession incentives accompany political fragmentation or alternation. Parties compete for state resources; unstable coalitions and policy reversals impede reform. External relationships become more partisan, producing greater variation in foreign-policy and investment decisions despite continued NATO membership.

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Bosnia and Herzegovina

External guarantees have preserved Bosnia and Herzegovina's state framework without resolving the internal contest over how the state should function. The Interdependence Index places the EU (84/100) ahead of the USA (65), Türkiye (62), Russia (48) and China (40). These aggregate ties conceal divergent external relationships among domestic actors. EU accession provides reform incentives; EUFOR and the Office of the High Representative (OHR) sustain the post-Dayton order. Energy resources and Corridor Vc offer economic potential constrained by divided authority.

Competing constitutional projects repeatedly obstruct government and threaten further fragmentation. Milorad Dodik's Alliance of Independent Social Democrats (SNSD) pursues secessionist objectives and transfers of state competences to Republika Srpska, supported by Serbia and Russia. Dragan Čović's HDZ BiH seeks stronger Croat representation and autonomy, potentially consolidating a third entity, with Croatian backing. The Troika coalition and Party of Democratic Action (SDA) favour stronger state institutions. Vetoes and patronage sustain party control while blocking decisions, appointments and reform.

Bosnia and Herzegovina's aggregate Exposure Risk Index score of 48/100 reflects a state whose institutions can be hollowed out without formal partition. Republika Srpska's obstruction of state courts and police undermines enforcement. Fragmented jurisdictions, patronage and criminal penetration impede accountability and enable foreign actors to bypass state oversight. Segmented media and education reproduce divisions; emigration and donor withdrawal weaken domestic capacity. OHR's powers to impose laws and remove officials formally remain an external safeguard, but weakening international backing for the institution is reducing its effectiveness.

Two drivers organise the 2026-2031 outlook: the credibility of the post-Dayton international framework, and cohesion within the constitutional order. EU incentives, OHR enforcement, EUFOR and US engagement depend on sustained political commitment. Domestic cohesion concerns whether actors pursue their objectives through common institutions or circumvent them. Neighbouring states, Russia, Türkiye and demographic decline affect both drivers.

1. **Incremental consolidation of the state:** Credible external support and greater domestic compromise advance accession and institutional reform. Less frequent vetoes and improved cooperation strengthen common policies without eliminating decentralisation.

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2. **Externally managed crisis:** International enforcement prevents rupture but cannot secure domestic agreement. Institutions survive through external pressure and recurrent intervention; crisis management substitutes for a political settlement.

3. **Managed decentralisation of the state:** Weaker international commitment produces negotiated accommodation. Republika Srpska gains practical autonomy, Croat parties secure stronger guarantees and Bosniak actors accept reduced state authority for stability. Territorial integrity survives as consolidation reverses.

4. **State rupture:** Weaker international constraints accompany unilateral institutional separation and competing authorities. Croat autonomy disputes intensify. Formal secession remains difficult, but security confrontations, political violence and paralysis become more plausible without necessarily producing large-scale war.

Georgia

Georgia's economic and societal integration with Europe is now running ahead of, and increasingly against, the direction taken by its government. The Interdependence Index places the EU (93/100) ahead of the USA (71), Türkiye (67), Russia (52) and China (35). Candidate status, trade agreements and strong public support sustain European integration's domestic base despite suspended accession negotiations. Black Sea ports, pipelines and railways give Georgia strategic value as a corridor bypassing Russia and Iran.

Georgian Dream (GD) and Bidzina Ivanishvili dominate political decision-making. Party control extends across government, municipalities, law enforcement and much of the judiciary, supported by patronage and commercial networks. A divided opposition struggles to convert sustained protest into institutional power. Proposed party bans, prosecutions and restrictions on media and civil society narrow the channels through which political change could occur.

Georgia's aggregate Exposure Risk Index score of 49/100 reflects vulnerabilities in sovereignty, governance and external dependence. Russian occupation of Abkhazia and South Ossetia provides enduring military leverage. Georgia relies on US and NATO defence cooperation without collective defence guarantees. Russian trade, tourism and infrastructure interests create additional pressure points. Politicised regulation and opaque ownership weaken financial oversight; funding restrictions erode independent scrutiny. Competing routes through Armenia could reduce transit revenues and diplomatic leverage.

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Two drivers organise the 2026-2031 outlook: the openness of domestic political competition, and the credibility of Euro-Atlantic integration. Elections, succession or governing-party divisions could alter GD's control. EU accession prospects, US engagement and transatlantic policy compatibility determine external opportunities. Russian occupation, the war in Ukraine and regional connectivity affect all four trajectories.

1. **Authoritarian stabilisation through selective Western re-engagement:** GD repairs external relations without surrendering control. Transactional US cooperation and limited concessions to the EU reduce isolation; accession may regain procedural momentum without substantial democratisation.

2. **Authoritarian breakdown and internal conflict:** Repression closes institutional channels, pushing confrontation into the streets. Protest and state violence could produce radicalisation and organised militant opposition. This remains a tail risk. Deteriorating legitimacy increases the government's reliance on Russian support.

3. **Democratic renewal and renewed European integration:** Electoral change, internal fracture or civic mobilisation breaks GD's monopoly. A reconfigured government restores competition, civic freedoms and judicial reform. Improved EU and US relations allow integration to resume from existing agreements and candidate status.

4. **Democratic renewal amid Western fragmentation:** Political reopening meets slower enlargement and weaker US engagement. Competing Armenian transit routes reduce Georgia's strategic importance. Reform improves EU relations but cannot replace lost leverage or offset Russian pressure without stronger external support.

Kosovo

Kosovo exercises most functions of an independent state while remaining dependent on external actors for its security and incomplete international recognition. The Interdependence Index places the EU (80/100), USA (64) and Türkiye (61) well ahead of China (22) and Russia (20). NATO guarantees security; the EU controls accession. Non-recognition by five EU members obstructs integration, while Russian and Chinese opposition blocks UN membership.

Domestic competition limits government authority, particularly in the Serb-majority north. LVV displaced the former governing parties without overcoming parliamentary fragmentation.

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Constitutional safeguards, opposition parties and minority representatives constrain executive power; repeated institutional deadlock interrupts policy. Serbia retains influence through political networks and publicly financed services. Extending Kosovo's authority can provoke resistance and disputes with the external partners on which its security depends.

Kosovo's aggregate Exposure Risk Index score of 33/100 conceals concentrated vulnerabilities. KFOR deters military escalation, but Kosovo cannot replace its guarantee. Serbia-linked informal and armed networks can weaken territorial control without conventional invasion. Diaspora income and property investment expose consumption and construction to conditions abroad; donor dependence leaves civic oversight vulnerable to funding cuts. Mineral deposits offer prospective leverage, subject to investment and commercial viability. The growing Kosovo Security Force expands bilateral cooperation but remains insufficient for independent territorial defence.

Two drivers organise the 2026-2031 outlook: the credibility and continuity of Euro-Atlantic engagement, and domestic governability. The latter concerns the capacity to form durable governments, fill constitutional offices and sustain policy. Relations with Serbia can intensify or moderate all four trajectories.

1. **Accelerated institutional consolidation:** Sustained external engagement, effective government and progress with Serbia advance integration, recognition and authority in the north. Stronger domestic institutions gradually reduce reliance on exceptional external arrangements.

2. **Perennial dependency on Euro-Atlantic support:** External engagement remains strong, but political fragmentation and stalled normalisation persist. KFOR and EU–US mediation contain recurrent crises. Security survives institutional weakness, and transitional dependencies become semi-permanent.

3. **Strategic diversification of partnerships:** External engagement weakens, but government remains effective. Kosovo expands defence capabilities and cooperation with Albania and Türkiye, deepens integration with Albania and acts more unilaterally in the north. Stronger Serbian responses and more frequent armed incidents accompany greater autonomy.

4. **Fragmented insecurity:** External retrenchment combines with political paralysis and confrontation with Serbia. Serbia-backed networks regain influence, armed and criminal

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groups exploit gaps in authority, and recurrent attacks undermine governance. Pressure below the threshold of conventional war makes effective control of the north uncertain.

Moldova

Moldova has moved rapidly towards the EU while attempting to reform institutions still exposed to Russian pressure and entrenched domestic networks. The Interdependence Index places the EU (90/100) ahead of the USA (71), Türkiye (54), Russia (52) and China (49). EU accession is constitutionally embedded, and European markets and energy networks have reduced dependence on Russia. Constitutional neutrality permits extensive security cooperation. Close Romanian ties, transport links with Ukraine and experience countering hybrid threats give Moldova value to European partners.

President Maia Sandu and the Party of Action and Solidarity (PAS) provide coordinated leadership, but reform depends heavily on their continued strength. PAS's parliamentary majority supports accession and anti-corruption measures; centralised decision-making, patronage and weak scrutiny qualify institutional progress. The Socialist-led Patriotic Bloc heads a fragmented parliamentary opposition. Ilan Shor's Russian-linked networks operate through illicit finance and successor organisations. Separatist Transnistria remains outside government control; autonomous Gagauzia contests central policy within Moldova's constitutional order.

Moldova's aggregate Exposure Risk Index score of 39/100 reflects reduced Russian leverage alongside persistent interference and limited state capacity. Vote-buying, disinformation and proxy networks exploit economic grievances. Russian troops sustain Transnistria's separation despite its weakening economy. Administrative shortages impede reform, while emigration erodes the workforce and tax base. Energy diversification reduces coercive dependence but exposes households to European supply disruptions and prices. Independent media and civil society remain reliant on foreign funding.

Two drivers organise the 2026-2031 outlook: the resilience of domestic reform and the credibility of EU membership. Reform durability depends on institutions extending beyond the governing camp; membership incentives depend on European commitment and tangible benefits. Transnistria, Russian interference, the war in Ukraine and fiscal constraints affect all four trajectories.

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1. **European integration that becomes difficult to reverse:** Sustained reform and accession progress embed institutional and infrastructural change. Better services broaden support, and Russian interference encounters stronger safeguards. Transnistria's growing dependence on Moldova and the EU improves prospects for negotiated reintegration without guaranteeing settlement.

2. **European integration without enlargement:** Reform continues despite EU obstacles to membership. Market access, infrastructure and security cooperation deepen. Romania and Ukraine become more important; reunification with Romania gains political salience as delayed accession weakens reform's appeal.

3. **An accession process sustained from outside:** EU commitment survives declining domestic implementation. European assistance compensates for administrative weakness and sustains negotiations, but reform becomes increasingly dependent on external resources and pressure.

4. **Gradual reversal of European transformation:** Reform weakens as membership loses credibility. Successor governments retain candidate status while weakening safeguards and renewing Russian ties. Russian-linked networks, Transnistria and Gagauzia gain leverage over central government.

Montenegro

Montenegro is approaching EU membership with a political system that remains fragmented enough to complicate the reforms needed to get there. The Interdependence Index places the EU (85/100) ahead of the USA (66), Türkiye (48), China (47) and Russia (42). NATO provides collective defence, while EU accession directs reform. The most advanced candidate targets membership by 2028. The Port of Bar and its inland connections offer potential transport and energy leverage.

The end of Democratic Party of Socialists (DPS) dominance dispersed power without dismantling patronage. Prime Minister Milojko Spajić's Europe Now Movement (PES) governs with the Democrats, minority representatives and pro-Serbian parties grouped under For the Future of Montenegro (ZBCG). Differences over identity, the Serbian Orthodox Church and

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relations with Serbia complicate coordination, as does Spajić's rivalry with President Jakov Milatović. DPS-era networks retain influence in administration and business. Elections, parliament and civil society constrain power, but appointments and enforcement remain politicised.

Montenegro's aggregate Exposure Risk Index score of 36/100 conceals several channels of external influence. Serbian political and religious connections and cross-border media allow external narratives to exploit identity divisions. Organised crime retains links with parts of the state apparatus. Tourism, property and infrastructure depend on foreign demand and capital; concentrated electricity generation exposes supply to drought and outages. Civil society provides scrutiny but relies heavily on international funding. NATO limits military vulnerability without resolving domestic disputes over alignment.

Two drivers organise the 2026-2031 outlook: the credibility of EU accession and associated reforms, and the durability and effectiveness of the post-DPS political system. Reform incentives depend on attainable membership; implementation depends on coalition management and administrative capacity. Identity disputes, external economic dependence and Serbian-language information networks affect all four trajectories.

1. **Accelerated European convergence:** Sustained enlargement momentum combines with stronger reform delivery and political cohesion. Judicial independence and administrative capacity improve. Montenegro joins the EU around the decade's end, potentially in 2028; identity disputes become less electorally decisive.

2. **Formalistic convergence with the EU:** Accession advances through sufficient legal and institutional adaptation, but coalition bargaining, patronage and uneven enforcement persist. Montenegro may enter the EU with many accession-era governance weaknesses intact.

3. **Transactional diversification of external relationships:** Weaker accession credibility encourages governments to prioritise investment from Gulf states, Türkiye and Asian partners in infrastructure, tourism and energy. EU alignment continues, but accession exerts less influence over reform and development choices.

4. **Statehood crisis:** Fading accession incentives and prolonged coalition instability intensify disputes over identity, the Serbian Orthodox Church and relations with Serbia.

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Institutional confrontations strain the post-2006 settlement. Political violence or attempts to restore concentrated rule become plausible at the trajectory's extreme.

North Macedonia

North Macedonia is deeply integrated into EU and NATO structures, but its EU accession path no longer provides reliable political rewards. The Interdependence Index places the EU (86/100) well ahead of the USA (68), Türkiye (58), China (39) and Russia (37). NATO membership fixes the country's security orientation, while European markets, investment and migration dominate economic and societal ties. Chinese infrastructure finance and Turkish commercial and cultural links broaden its relationships without offering an alternative to the EU. Corridor VIII increases North Macedonia's relevance for European connectivity and NATO military mobility.

VMRO-DPMNE dominates the ethnic-Macedonian political arena, but power remains constrained and distributed. SDSM has ceased to provide an equivalent rival, giving the governing party unusual control over the domestic agenda. Albanian participation in government, constitutional protections derived from the Ohrid settlement and the two-thirds majority required for constitutional change limit unilateral action. Patronage and political-business networks survive changes of government, particularly around appointments, procurement and access to state resources. The question is therefore less Mickoski's personal authority than what a dominant governing party does with a comparatively weak opposition.

The Exposure Risk Index is relatively low at 38/100, but societal exposure reaches 45. Weak judicial independence, political and commercial dependence in the media, foreign-funded civil society and segmented Macedonian- and Albanian-language information environments provide channels for outside influence. Russian narratives frequently arrive through Serbian media and Orthodox networks, while Bulgarian organisations have operated Macedonian-language outlets. Economic exposure comes chiefly from dependence on European manufacturing demand, imported energy and foreign-owned production rather than rival geopolitical powers.

Two drivers organise the outlook: the credibility of EU accession and the use of concentrated political power. Interethnic power-sharing and demographic decline affect all four trajectories.

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1. **Renewed accession momentum:** Enlargement accelerates and a compromise unlocks negotiations. Accession again rewards difficult reforms and restricts patronage.

2. **Accession without transformation:** Negotiations advance, but governments preserve executive influence and patronage while implementing enough formal reform to maintain progress.

3. **Deepening illiberalism and strategic hedging:** Accession stagnates and illiberal practices become more entrenched. NATO membership survives, but China, Türkiye and Gulf states gain larger roles as interethnic politics begins to fracture.

4. **Political pluralisation without accession momentum:** VMRO-DPMNE dominance erodes but EU blockage persists. Greater competition makes state capture harder while fragmented coalitions struggle to sustain reform; gains by nationalist, eurosceptic parties like Levica weaken the Euro-Atlantic consensus.

Serbia

Serbia depends heavily on the EU economically while using relationships with Russia, China and other partners to resist the political constraints of closer European integration. The Interdependence Index places the EU (82/100) ahead of the USA and Russia (64 each), China (60) and Türkiye (50). Accession remains stalled, while military neutrality permits varied defence relationships. Regional influence, manufacturing and mineral resources provide bargaining power, although alternatives cannot replace European markets and investment. Kosovo links domestic politics to Russian and Chinese diplomatic support.

President Aleksandar Vučić and the Serbian Progressive Party (SNS) dominate institutions through personalised authority and patronage. The Socialist Party of Serbia (SPS) retains separate networks within the governing bloc. Public employment, procurement, security services and media support SNS control. Student-led mobilisation has challenged this system beyond the fragmented established opposition, producing a Student List for the October 2026 election. Vučić's proposed return to the premiership would transfer personal authority between offices.

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Serbia's aggregate Exposure Risk Index score of 56/100 reflects dependencies that diversification does not remove. Russian gas and ownership of oil company NIS expose energy security to sanctions and supply pressures. Chinese firms hold important positions in mining, industry and digital infrastructure, while European demand drives exports and employment. Executive bargaining over major projects weakens scrutiny. Politicised media amplify Russian narratives; pressure on independent organisations restricts accountability. Political-criminal networks provide informal channels of regional influence and insecurity.

Two drivers organise the 2026-2031 outlook: the durability of the Vučić–SNS political system, and the credibility of EU accession. Civic mobilisation, elections and succession test political control. Membership incentives confront governments with choices over institutional reform, Kosovo and foreign-policy alignment. Regional disputes, energy, mining and defence manufacturing affect all four trajectories.

1. **European convergence without accession:** The governing system survives as membership becomes more credible. Selective regulatory and foreign-policy accommodation advances integration, but resistance to reforms threatening political control prevents accession.

2. **Authoritarian rupture:** Domestic pressure or regional crisis drives repression and confrontation with the EU. Accession loses restraining force; Russia, China and other partners provide greater political support and investment. Diversification increasingly serves regime preservation despite continuing European economic dependence.

3. **Political transition and European reorientation:** A successor government pursues reform as accession becomes more credible, restructuring sensitive Russian and Chinese relationships. Entrenched SNS, security and business networks resist; Kosovo and alignment requirements divide the governing coalition and electorate.

4. **Political transition without strategic realignment:** Political competition reopens but accession remains stalled. Successor governments improve institutions while retaining diversified partnerships. Kosovo, caution towards NATO and economic interests sustain multi-alignment beyond Vučić's personalised system.

Ukraine

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Ukraine has become a major European military power while remaining dependent on its partners for guarantees, capabilities and financing. The Interdependence Index places the EU (90/100) and USA (83) far ahead of Türkiye (54), China (47) and Russia (26). European states now finance most external military assistance and the EU dominates trade, public financing and accession-linked reform, while the USA remains difficult to replace in advanced air defence, intelligence and some weapons. Ukraine also brings substantial assets to these relationships through its combat-experienced armed forces, rapidly expanding defence industry, critical minerals, agriculture, digital capacity and the scale of reconstruction.

Martial law has concentrated authority around the presidency without eliminating other centres of power. Elections remain suspended and the Office of the President dominates strategic decision-making, but parliament, local government, civil society, anti-corruption institutions and the Armed Forces retain independent authority. The war has weakened the oligarchic system that shaped pre-2022 politics while increasing the importance of defence manufacturers, state-owned enterprises, volunteers and military figures. The eventual return to elections will redistribute authority among actors whose political weight has changed substantially during the war.

The low Exposure Risk Index score of 29/100 masks severe vulnerabilities created by war and reliance on foreign support. Russian political, business and media penetration has fallen sharply, but occupation of roughly one-fifth of Ukrainian territory directly constrains sovereignty and security. Foreign financing supports much of civilian government expenditure, while several critical military capabilities remain externally supplied. More than €500 billion in reconstruction needs will require foreign capital and guarantees. Demographic decline, displacement, damaged energy infrastructure and wartime corruption will persist beyond active combat.

Two drivers organise the 2026-2031 outlook: the stability and legitimacy of Ukraine's post-war political settlement, and the cohesion of Euro-Atlantic support. The course of the war, any settlement with Russia, reconstruction and demographic change affect all four trajectories.

1. **Permanent wartime state within European security integration:** Executive concentration persists as conflict remains unresolved, while deep European defence integration compensates for delayed political normalisation.

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2. **Centralised security state amid fragmented support:** External backing weakens; emergency government hardens into authoritarianism as defence, intelligence and military self-reliance dominate politics.

3. **Political pluralism and deeper European integration:** Martial law ends, elections redistribute authority and renewed reform combines with reconstruction and advancing EU accession.

4. **Fragmented transition amid declining support:** Political competition reopens as external assistance weakens. Coalition fragmentation, reconstruction disputes and Russian pressure undermine reform and could expose Ukraine to further territorial losses or a settlement on worse terms.

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