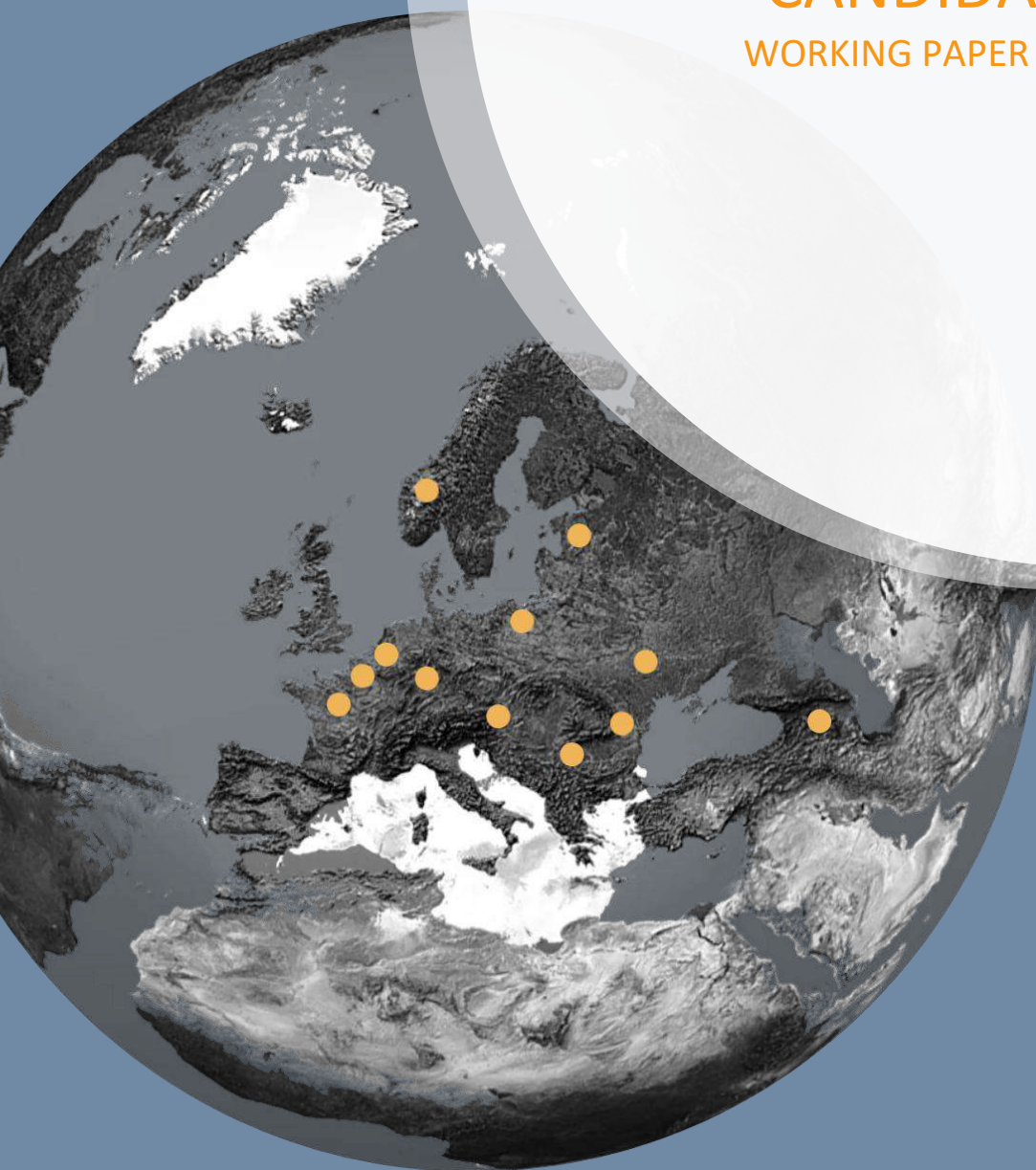




# ANTICIPATING FOREIGN MALIGN INFLUENCE IN EU CANDIDATE COUNTRIES

WORKING PAPER D7.1 ON SCENARIOS AND  
FORECASTS UNTIL 2035



DECEMBER 2025

**REUNIR – D7.1 – WORKING PAPER ON 2 THREAT-SCANNING AND STRATEGIC FORESIGHT WORKSHOPS, INCL. EXPERT SURVEY-BASED EVALUATIONS, CROSS-CUTTING FINDINGS + LESSONS ON METHODOLOGY AND THREATS, INTEGRATED ANALYTICAL RESULTS ON FUTURE THREATS**

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# 1. INTRODUCTION

In this Working Paper, Working Paper, we investigate future threats to the security, socio-economic and democratic systems of (potential) Candidate Countries (CCs)<sup>1</sup> for European Union (EU) membership in the Eastern Neighbourhood (EN3) and Western Balkans (WB6). For this, we develop and apply a complementary scenario-based foresight and data-based forecasting approach to identify future geopolitical threats resulting from the geopolitical ambitions and activities of China, Russia, Turkey, the United States and the Arab countries of the Gulf (external state actors)<sup>2</sup> up to 2035<sup>3</sup>.

According to the REUNIR project's conceptual framework, we define threats as 'a function of capabilities and intent to exploit vulnerabilities' in the resilience of CCs in the EN3 and WB6 (Bressan et al., 2024, p. 7). Resilience is defined as 'the ability not only to withstand and cope with challenges but also to undergo transitions in a sustainable, fair, and democratic manner' (European Union, European Commission, 2020, p. 6). To cover potential future threats across the full spectrum of security, socio-economic and democratic systems and means – including activities below the threshold of open hostility – we investigate foreign malign influence (FMI) defined as influence attempts by external state actors that have the potential to undermine the resilience and EU accession prospects of the EN3 and WB6. This definition of FMI goes beyond narrow understandings that focus on interference in the information domain only (see Bressan et al. 2024, p. 14)<sup>4</sup>.

Prior analyses in the REUNIR project focused on identifying and assessing threats based on calculable risks in the past and present. The geopolitical reality in the WB6 and EN3, however, shows that basing analyses and policy on past patterns and known risks is not enough to anticipate and prepare for the future – something the EU has realised and responded to with investments in strategic foresight research to inform policy practice (e.g., European Commission, 2025). With this Paper, we therefore set out to identify and analyse future threats that result from both calculable risks and radical uncertainties, building on a theoretical framework based on Katzenstein and Seybert (2018) that links the exercise of power to risk and uncertainty (see Bressan et al., 2024, p.7; based on Katzenstein & Seybert 2018).

Specifically, the framework posits that scholars have mostly focused on actors' ability to exercise control in the face of calculable future risks (Katzenstein & Seybert, 2018, p. 80). This capability-focused view neglects the fact that political actors mostly operate under radical uncertainty, in which case control power – responding to calculable risks with established tools and standard operating procedures – fails (Katzenstein & Seybert 2018, p. 80 f.). Instead, risks stemming from uncertainty require protean power, which emerges from 'practices of agile actors coping with uncertainty' (Katzenstein & Seybert 2018, p. 80, see Table 1 below).

To assess uncertainty-based future threats, we apply what we call a *possibilistic* methodology – i.e. expert-based, collaborative scenario foresight that is designed to counter common biases in thinking about the

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<sup>1</sup> In the REUNIR project framework, the (potential) candidate countries (CCs or Candidate Countries) are Georgia, Moldova and Ukraine (EN3), as well as Albania, Bosnia and Herzegovina, Kosovo, North Macedonia, Montenegro, and Serbia (WB6).

<sup>2</sup> In the REUNIR project framework, the geopolitical state actors we research are the governments of China, Russia, Turkey, the United States and the Arab countries of the Gulf Cooperation Council (GCC or "Gulf countries"), excluding the EU and its Member States.

<sup>3</sup> The timeframe of analysis up to 2035 was chosen for the REUNIR project to provide forward-looking insights that are relevant for the time horizon of foreign policy making in the EU.

<sup>4</sup> For a discussion on different definitions of foreign malign influence and interference, see Fridman (2024). The author discusses the challenge of determining the true (malign) intent of influence actors. We circumvent this problem by defining any attempt that goes against the goal of a democratic future of CCs and their accession to the EU as FMI. For a discussion of the EU's approach to FMI, see Proto et al. (2025).

future and anticipate threats emerging from radical uncertainty when ‘predictive accuracy is unobtainable’ (Katzenstein & Seybert 2018, 90; see Katzenstein & Seybert 2018, 87; Bressan et al., 2024;). In addition, we apply a *predictive* methodology – i.e. data-based simulated forecasts – to assess calculable risk of future FMI. This latter approach relies on data from the past to extrapolate and model future FMI to show how future risk can be approximated numerically.

Table 1: Theoretical framework for REUNIR’s threat and resilience assessments<sup>5</sup>

| Category                                 | Calculable Risk                                                                                                                    | Fundamental Uncertainty                                                                                                                                                |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Nature of the environment                | Calculable risk                                                                                                                    | Fundamental uncertainty                                                                                                                                                |
| Approach to future                       | Probabilistic, predictive thinking                                                                                                 | Possibilistic thinking                                                                                                                                                 |
| Empirical basis                          | Structured data and causal models available                                                                                        | No structured data and causal models available                                                                                                                         |
| Foresight/threat identification method   | Prediction, forecasting                                                                                                            | Scenario-based foresight                                                                                                                                               |
| Policy responses                         | Traditional responses and tools can be sufficient (“control power”)                                                                | Innovation is required (“protean power”)                                                                                                                               |
| Relation to vulnerability and resilience | Specific vulnerabilities associated with known risks can be identified and ideally patched; this also increases overall resilience | Under fundamental uncertainty, it is harder to identify specific vulnerabilities and how they might be exploited; resilience can and should be built in relevant areas |

With its distinct focus on the future; on both uncertainties and risks; and on external geopolitical state actors, this Working Paper contributes a building block to the REUNIR project’s overall goal of identifying how EU foreign policy toolboxes can and should be made fit for purpose in support of the CCs.

Chapter 2 of this report presents the development and analysis of a collaborative scenario-building process to identify the most critical, plausible uncertainty-based threats that could emerge from the geopolitical ambitions and foreign influence activities of non-EU powers. The section also presents survey-based expert assessments of the most relevant dimensions for the future of resilience in the EN3 and WB6, as well as underrated future FMI from external state actors. It complements existing analyses by offering a broad perspective on FMI across security, socio-economic and democratic resilience and a structured, systematic exploration of potential future influence from a set of geopolitically relevant external state actors.

Next, Chapter 3 presents the methodology and analysis of our data-based forecasting and simulation approach to estimate future levels of FMI up to 2030. Constrained by the limited availability of structured

<sup>5</sup> Table adapted from Bressan et al. (2024, p. 8).

data on FMI that can be used for forecasting, the quantitative proxy used to operationalise the concept of FMI is the Resurgent Authoritarian Influence (RAI) tracker score (Springman et al., 2022). Chapter 4 synthesises our overall findings, discusses them in the light of REUNIR's overall goal and outlines next steps for the project and future research.

## 2. SCENARIO-BUILDING AND ANALYSIS

### 2.1. Scenario Methodology

Scenarios in REUNIR are 'descriptions of possible situations and chains of events with explicit reference to the future' (Bressan et al., 2019b, pp. 12–13; based on Gabriel, 2013; Neuhaus, 2006, as cited in Bressan et al., 2024, p. 4). We create these scenarios in a collaborative, facilitated process, starting with survey-based expert assessments that integrate the project's three domains of security, socio-economic and political-democratic systems in CCs, to investigate which FMI mechanisms may jeopardise resilience and EU accession in the period up to 2035.

This approach to scenario construction draws on scholarship and professional practice (see Bishop et al., 2007; Bressan et al., 2019b; Gabriel, 2013, 2014; Kosow & Gaßner, 2008; Van Notten et al., 2003). It builds on the threat scanning, qualification, and monitoring (TSQM) approach piloted in the EU Horizon 2020 EU-LISTCO<sup>6</sup> research project (Bressan et al., 2019a; see also Bressan et al., 2024, p. 10).

For scenario development, expert groups are guided through multiple steps to develop scenarios understood as expert assessment-based, structured thought experiments about plausible alternative futures. These are futures which are conventionally assessed as unlikely – not because they are objectively unlikely, but because analytical and psychological biases tend to lead human beings to underestimate fundamental change (see Schirrmeister et al., 2020). The design is therefore an intentional choice to challenge biased expectations, analytical biases, and blind spots, and to centre underestimated or surprising possibilities (see Bressan et al. 2021). By carefully countering biases in spontaneous, unstructured futures thinking, the method takes fundamental uncertainty seriously and enables its exploration. It leverages diverse subject-matter expertise and integrates assessment and assumptions from REUNIR researchers with expertise in military, economic and democratic systems of the EN3 and WB6. This facilitates the exploration of systematic interlinkages of plausible future developments, expanding the realm of what is highly possible, and what might merit attention to be considered plausible (see Voros, 2003; 2008).

In the following sub-sections, we present the method and expert-based assessments resulting from a two-step Delphi expert survey to identify, rate, and prioritise key factors (structured key factor rating and key uncertainty selection) (see section 2.3). The results of these surveys feed into two collaborative foresight and scenario-building workshop series, one for the WB6 and one for the EN3 (detailed in section 2.4). These allow for an in-depth exploration of each region through scenarios that consider the consequences of FMI beyond the realm of calculable risk. These are then analysed in detail, synthesising findings across both sub-regions (section 2.5).

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<sup>6</sup> Europe's External Action and the Dual Challenges of Limited Statehood and Contested Orders (EU-LISTCO).



## 2.2. Literature Review: Existing Scenarios on Foreign Malign Influencing in EU Candidate Countries

### ***Foreign Influence***

Our literature review is based on published scenarios that draw on a strategic foresight methodology and on regional expertise and discuss the future of enlargement and security dynamics in the EN3 and/or WB6. Given the project's timeframe, we review existing scenarios relevant to the 2025–2035 timeframe to analyse which roles external state actors and FMI play in them. Russia's war against Ukraine has introduced a great deal of volatility in the region we research, with relatively few long-term scenarios still available within this new geopolitical reality. In this context, we relaxed our search criteria for Ukraine scenarios and included additional, more up-to-date forward-looking analyses from individual experts, even if they are not based on a structured foresight methodology (Fix & Kimmage, 2022; Masala, 2025; Mejías & Silva, 2025; Yashchuk, 2025).

Overall, authors of existing scenario analyses warn mainly about Russian and Chinese activity and their interplay (Bordea, 2023; Farfał, 2024; Tsetsos, 2024). Most authors expect Russia, as the region's main disruptive actor, to continue engaging in mostly hybrid – and, to a lesser extent, overt – warfare<sup>7</sup>; strategic corruption of security, economic and political systems; disinformation; and energy manipulation (Bordea, 2023; Farfał, 2024; Friedrich-Ebert-Stiftung, 2014; Karjalainen, 2023; Mejías & Silva, 2025; Tsetsos, 2024). Russia maintains its influence equally through military action (or threat thereof) and domestic leverage through elite co-optation. Vis-à-vis the EU, scenarios depict Russia in a zero-sum dynamic: as one withdraws, the other expands to exploit the resulting power vacuum.

China, while also often framed as a malign actor, is expected to remain comparatively benign in existing scenarios up to 2035, mainly acting as an economic investor and offering a low-conditionality alternative to EU development models (Farfał, 2024; Fix et al., 2024; Friedrich-Ebert-Stiftung, 2014; Kemp et al., 2025; Schmälter & Schmitz, 2023; The Georgian Institute of Politics, 2023). Via this pathway, scenario analyses warn about the potential for China to contribute to a deterioration of democratic governance structures in CCs and to stalled EU integration. Viewed with increasing suspicion regarding its role in undermining democratic governance, China appears as a bystander or partner to Russian ambition in many scenarios (Bordea, 2023; Fix et al., 2024; Friedrich-Ebert-Stiftung, 2014; Schmälter & Schmitz, 2023) and rarely as a competitor or adversary to Russia (Directorate General for Parliamentary Research Services, 2023; Friedrich-Ebert-Stiftung, 2014). Similar to the EU-Russia zero-sum dynamic, the extent of the Sino-Russian influencing nexus is assumed to be contingent on Western (dis)engagement (Farfał, 2024). In any case, scenarios assume China to benefit from the West being distracted or disengaging from its Neighbourhood.

Turkey appears only sporadically in scenarios about the WB, aligning with Sino-Russian anti-EU interests (Aspen Institute, 2023; Bordea, 2023; Visegrad Insight, 2022). It could furthermore play an elemental role in Black Sea security through its withdrawal from NATO activities and potential alignment with adversaries such as Russia, China, and North Korea (Bordea, 2023). While still peripheral, the Gulf states, especially the United Arab Emirates, are portrayed as actors with the potential to exert indirect influence on developments in CCs.

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<sup>7</sup> Mostly in Ukraine, in Karjalainen (2023) also in the Western Balkans, Moldova and Georgia.

Their involvement ranges from filling a political and economic power void (Visegrad Insight, 2022) to actively funding violent actors in case of paramilitary escalation in the WB6 (Kemp et al., 2025).

In a similar vein to Gulf actors, the United States (both considered as relevant geopolitical actors in REUNIR) only emerges sporadically. Across both the WB6 and EN, scenarios the United States appears as increasingly disengaged or unreliable, with some analyses doubting whether it remains a dependable guarantor of peace and security in the region (Aspen, 2023). In the EN3, several scenarios go further, depicting it as contributing to adverse or morally compromised outcomes for Ukraine: ranging from jointly dictating a ‘meaningless peace’ with Moscow (Yashchuk, 2025), to negotiating directly with Russia while excluding Kyiv and Brussels (Mejías & Silva, 2025), or withdrawing support in ways that force Ukraine into a Russian-dictated settlement (Fix & Kimmage, 2022). Other major increasingly active geopolitical actors as India in the WB6 (see Gupta, 2024) are not yet considered.

### ***EU accession across the (potential) candidate countries***

In existing scenarios, the future of EU enlargement in both the EN3 and WB6 can be summarised as four main pathways, each reflecting distinct dynamics of reform, political will, and institutional adaptation. First, non-accession scenarios assume accession fatigue from the EU and/or (potential) CC side, or an outright *de jure* collapse of the accession process (Aspen Institute, 2023; Directorate General for Parliamentary Research Services, 2023; Farfał, 2024; Karjalainen, 2023; The Georgian Institute of Politics, 2023; Visegrad Insight, 2022). In these scenarios, the EU risks losing relevance as a norm-setting actor and security guarantor and may simultaneously jeopardize its own security.

Second, the accession without reforms path is marked by reform deficits or inertia in CCs, meaning (potential) candidate countries are admitted into the EU without sufficient transformation, creating long-term instability within the EU and their respective regions (Aspen Institute, 2023; Farfał, 2024; Friedrich-Elbert-Stiftung, 2014; Karjalainen, 2023; Visegrad Insight, 2022). Crucially, these scenarios highlight the importance of reform (and the consequences of absence or limited enforcement of reforms) both within CCs and the EU’s own institutions and accession process. According to these scenarios, premature accession without reforms could jeopardise a successful enlargement process and further entrench EU internal dysfunctionality.

Third, the staged or partial accession scenarios describe incremental integration, offering multi-track gradual participation in EU institutions to balance the need for early integration along with potential pitfalls (Aspen Institute, 2023; Bondarenko et al., 2025; European Commission, 2021; Farfał, 2024; Friedrich-Elbert-Stiftung, 2014)<sup>8</sup>. While the specific design of these stages differs between scenarios, they often propose sectoral enlargement rooted in economic pragmatism (through single market and labour supply access), in the hope that deep institutional reforms will follow the momentum of economic growth. Even so, few have imagined successful changes to the enlargement process without (at the very least) the risk that this occurs too late to make a substantive difference.

Finally, full accession scenarios envision comprehensive and successful integration, driven by both geostrategic necessity and institutional reforms (Bondarenko et al., 2025; Karjalainen, 2023; Schmälder &

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<sup>8</sup> Note that we only include foresight-based scenarios in this review, not other analyses or policy papers that propose enlargement options and recommendations.

Schmitz, 2023). Without drastic changes to the Copenhagen criteria, this scenario remains radically optimistic for most countries and presumes unprecedented political and financial support from the EU.

### ***Western Balkans (WB6)***

Scenario analyses of the WB6 up to 2035 indicate that its future hinges mostly on EU enlargement and Western (dis)engagement (as described above), regional economic and demographic crises, and foreign interference-driven autocratic regime stabilisation (Aspen Institute, 2023; Farfał, 2024; Karjalainen, 2023; Visegrad Insight, 2022). Although some analyses offer more granularity, the WB6 countries tend to be treated as relatively uniform with respect to these challenges in the scenarios.

The Western Balkans' economic and demographic stabilisation depends on a few distinct but mutually reinforcing factors, predominantly migration, brain drain, climate crises, and economic integration. The first three appear as particularly intertwined in scenario narratives: an exodus of the region's young labour force may lead to a paralysing brain drain and, in extreme cases, to outright depopulation (Aspen Institute, 2023; European Commission, 2021; Farfał, 2024; Schmälter & Schmitz, 2023; The Adriatic, 2025; Visegrad Insight, 2022). These would be further exacerbated by climate-change induced disasters, to which the Balkans are particularly vulnerable compared to the rest of Europe (Barron & Van Manen, 2022). In contrast, climate as a shared challenge has the potential to unify regional actors in some scenarios, leading to harmonious and coordinated regulation that could attract foreign investment (Aspen Institute, 2023; Farfał, 2024; Schmälter & Schmitz, 2023). Finally, several scenarios see stable institutions, economic growth, and a robust FDI as the main drivers of good governance (Aspen Institute, 2023; Visegrad Insight, 2022; European Commission, 2021; Bordea, 2023). Vice versa, so-called stabilitocracies (Bieber, 2018)<sup>9</sup> may persist and drain economic resources if opaque investments by malign actors dominate (Aspen Institute, 2023; Schmälter & Schmitz, 2023; Visegrad Insight, 2022).

The main security concern in WB6 scenarios is a resurgence of ethnic tensions, which could trigger a region-wide escalatory spiral towards violence and war. Here, external state actors incite violence with divisive narratives and direct funding of military insurgencies in some scenarios (Aspen Institute, 2023; Directorate General for Parliamentary Research Services, 2023; European Union Institute for Security Studies, 2018; Karjalainen, 2023; Kemp et al., 2025; Tsetsos, 2024).

### ***Eastern Neighbourhood (EN3)***

Existing scenarios about the EN3 up to 2035 centre mostly on EU enlargement and Western (dis)engagement, the war in Ukraine, as well as domestic democratic developments in light of predominantly Russian and Chinese FMI (Directorate General for Parliamentary Research Services, 2023; Farfał, 2024; Karjalainen, 2023). Most existing scenarios focus on Ukraine, while there are not as many on Georgia and Moldova.

Besides the future of EU enlargement, the outcome of the ongoing war Ukraine is the most important issue discussed in EN3 scenarios. The outcome of the war and EU enlargement are often intertwined. Here, four main scenarios take shape: a *frozen* war locking Ukraine into uncertain geopolitical limbo (Directorate General for Parliamentary Research Services, 2023; Fix et al., 2024; Lough, 2024; Yashchuk, 2025), a *prolonged* war leading to destabilisation and escalation beyond the territory of Ukraine (Bordea, 2023;

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<sup>9</sup> Stabilitocracies are “governments that claim to secure integration and rely on informal, clientelist structures, control of the media, and the regular production of crises to undermine democracy and the rule of law” (Bieber, 2018, p. 176).

Directorate General for Parliamentary Research Services, 2023; Fix et al., 2024; Friedrich-Elbert-Stiftung, 2014; Lough, 2024; Mejías & Silva, 2025), a *decisive loss* for Ukraine (Bordea, 2023; Fix & Kimmage, 2022; Lough, 2024; Masala, 2025; Yashchuk, 2025), or a *decisive victory* for Ukraine (Bondarenko et al., 2025; Bordea, 2023; Fix et al., 2024; Lough, 2024). Decisive loss scenarios describe significant withdrawal of Western military support and/or the Ukrainian military's collapse leading to a post-war agreement that favours Russian (Lough, 2024; Masala, 2025), or even joint US-Russian interests (Mejías & Silva, 2025; Yashchuk, 2025), including sizeable territorial losses of Ukraine to Russia. Meanwhile, decisive win scenarios reinstate at least the 2022 borders of Ukraine and envision a reformed Ukraine with a future of European and NATO integration (Bondarenko et al., 2025; Bordea, 2023; Fix et al., 2024; Lough, 2024).

Economic factors are discussed less in-depth in scenarios of the EN3 compared to the WB6, but scenarios also assume a link between EU-backed anti-corruption reforms and economic upturn (Karjalainen, 2023; Bondarenko et al., 2025). Energy dependency and trade vulnerability remain structural constraints, leaving the neighbourhood exposed to hybrid economic coercion and supply shocks (Bordea, 2023; Tsetsos, 2024). Domestic political trajectories in the EN3 are portrayed as fragile and contingent on both EU engagement and elite dynamics: scenarios range from entrenched corruption and democratic paralysis (Farfał, 2024; Karjalainen, 2023) to renewed democratic consolidation driven by candidate status and civil society empowerment in Georgia and Ukraine (Bondarenko et al., 2025; The Georgian Institute of Politics, 2023). Elite capture and hybrid interference remain key determinants of political developments, undermining rule-of-law reform and bolstering stabilitocracies across the region (Friedrich-Elbert-Stiftung, 2014; Tsetsos, 2024).

### ***Literature review synthesis***

Overall, existing scenario analyses for the 2025–2035 timeframe tend to rely on a comparatively narrow actor landscape, focusing primarily on Russian and, to a lesser extent, Chinese involvement in the WB6 and EN3. Other foreign powers, such as Turkey, the Gulf states, and the United States, appear only sporadically, despite their growing geopolitical relevance. Similarly, most analyses treat the WB6 and EN3 as separate spheres, offering limited comparative analysis. Across the spectrum of topics, economic, digital, and cultural vulnerabilities are rarely explored for both the EN3 and WB6. Finally, few scenarios consider developments beyond any EU accession decision, leaving the post-accession trajectory of governance, security, and societal resilience underexplored.

This Paper seeks to complement existing foresight work by presenting a novel analysis of underrated and uncertainty-based FMI in the EN3 and WB6 – taking seriously the finding that foreign policy failures are often the consequence of so-called strategic surprises and a failure to imagine future alternatives (see Dahl 2013). It presents the methodology and intermediary results of a theory-driven, structured foresight process and analysis in great detail, including survey-based expert assessments on critical uncertainties, trends, weak signals and underrated future FMI in CCs up to 2035.

REUNIR's holistic focus on FMI across the military, economics and democracy domains, and its impact on resilience, further allows a systematic exploration of external state actors' potential role and the way this is expected to interact with the EU in the EN3 and WB6. It is designed to capture the role of emerging - and returning - geopolitical actors in the WB6 and EN3, such as Turkey, Gulf states and the United States and their interplay with the European Union, whose influence may grow, decline or change in the coming years, in line with global geopolitical shifts, and whose roles are underexplored in the literature. In contrast, dynamics

among EU Member States and their bilateral or plurilateral engagement with CCs are not explored in detail, because priority is given to the role of other geopolitical state actors.

Finally, although EU enlargement prospects are one of the focal points of our analysis, the scenario methodology does not define (non-)enlargement as the endpoint of the scenario timelines. As a result, many scenarios include (non-)accession in the period between 2025 and 2035, allowing us to explore various conditions, consequences and effects beyond potential (non-)enlargement.

## 2.3. Survey-Based Expert Assessments

The foundation of REUNIR's scenario-building process is a two-step Delphi expert survey process to scan for and assess key influential factors for the future of the WB6 and EN3, integrating expertise on military, economic and democratic systems of the EN3 and WB6. This method is particularly well suited to incorporating diverse expertise on uncertain developments and structuring expert consensus. (see Häder, 2002). In these surveys, REUNIR experts identify, rate, and prioritise factors that impact the security, economy and democracy of (potential) EU CCs as a starting point for subsequent scenario building and analysis steps (Bressan et al., 2024, p. 10). The surveys were distributed among REUNIR consortium members, complemented by selected external experts to achieve better coverage of a large spectrum of risks, especially concerning the role of external state actors in EU (potential) CCs. The central selection criterion for external experts was expertise on the external state actors under investigation in REUNIR and their influence in the WB6 and EN3, based on recommendations from REUNIR partners.

In total, we contacted 101 experts, including 63 external experts recommended by consortium members and 38 members of the consortium itself. These expert contributions fed into two survey rounds: The first survey round identifies potential threats to the democracy and resilience of CCs spanning both regions; in the second round, experts rated the certainty and potential impact of threats, which were then clustered and augmented by our research team. The first round covered the EN3 and WB6 together, while the second was divided into two parts for each region to increase the granularity of results. The survey rounds took place between February and April 2025.

### 2.3.1. Western Balkans, Eastern Neighbourhood and Foreign Influence in 2035 - Expert Delphi Survey Round 1

The first round of the Delphi survey was conducted to detect potential threats to democracy, resilience, and EU accession prospects in the WB6 and the EN3 by 2035, with particular attention to threats posed by foreign influence of external state actors. This approach allows assessments to be collected from a large group of experts and intermediary results to be fed back in a second step. The questionnaire, fielded in February 2025, consisted of two questions. We first asked experts to identify and define 10–20 key influential factors that could shape the state of democracy, security, economy, and EU accession prospects in these countries between 2030 and 2035, with an option to specify which CCs the factors apply to. The second question shifted focus to foreign influence, asking experts to identify impactful and underrated ways in which external state actors might undermine democracy, resilience, and EU accession processes in (potential) CCs by 2035, again specifying which countries these may apply to. In total, we collected 36 valid survey responses from REUNIR consortium members and external experts.

The first question yielded 567 ‘raw’ key influential factors for the future of the CCs that served as the foundation for the next stages of the foresight process. The research team clustered factors in the data analysis stage, reducing the overall number while retaining the full spectrum of suggested topics. For the key influential factors, we first clustered answers based on broad topical domains (such as different external actors, economy, social cohesion, and democracy), then merged similar factors in clusters under a consolidated title.<sup>10</sup> This step was necessary to reduce the level of detail and complexity for the second survey step, while subsequent steps of scenario building allow experts to bring back in the nuances of individual survey responses. We then conducted a final factor reduction to sort out redundancies. This produced 34 and 33 key influential factors for the WB6 and EN3 respectively.

On the second question, the survey further yielded a total of 123 entries to the question of impactful, underrated ways in which external state actors might undermine democracy, resilience and EU accession processes in EU (potential) candidate countries by 2035. We analysed and aggregated these by foreign actor, geographical focus of any influencing attempts and type of influencing. To use the factors in the subsequent scenario construction process, we further categorised them into (a) wild card-style FMI events and (b) potential FMI mechanisms that could be used to reinforce existing scenario developments to further explore FMI during scenario construction (see section 2.4.2 and Annex A for a full list). Wild cards are ‘sudden and unique incidents’, which are ‘assumed to be improbable, but which would have large and immediate consequences’ and are commonly used in foresight processes to ensure a more comprehensive exploration of uncertainties beyond incremental future change (Mendonça et al., 2004, pp. 201-202).

### 2.3.2. Key Influential Factors 2035- Expert Delphi Survey Round 2

The second Delphi survey round consisted of two separate surveys (one for the EN3 and one for the WB6) to capture regional differences. As this survey round marked the start of the scenario generation process, the survey was fielded among eventual scenario workshop participants and REUNIR consortium members only, covering a broad spectrum of security, socio-economic and political expertise on the various CCs from the 12 partner institutions. Ultimately, 24 experts participated in the EN3 and 19 in the WB6 survey.

Based expert input from the first round, the WB6 responses produced 34 factors, while for the Eastern EN, the entries led to a consolidated list of 33 factors for analysis. In this round, we asked experts to rate these submitted factors on their (un)certainly and impact potential using six-point ordinal scales, while acknowledging that some factors were influenced by stable, well-understood forces and others shaped by more unpredictable dynamics. First, respondents evaluated the degree of certainty of the factor’s development by 2035. Second, experts assessed the potential impact of each factor on democracy, security, the economy, and EU accession prospects in the WB6 by 2035. We instructed respondents to consider various possible trajectories for each factor, not just worst-case outcomes, and to be mindful of cases where combining multiple dynamics might artificially inflate or contradict a factor’s assessed impact.

The survey results served as a basis for factor selection through uncertainty-impact assessment for the consecutive scenario-building. To this end, we plotted the results according to their mean impact and degree of uncertainty. In addition, we paid attention to the variance in expert assessments to detect disagreement

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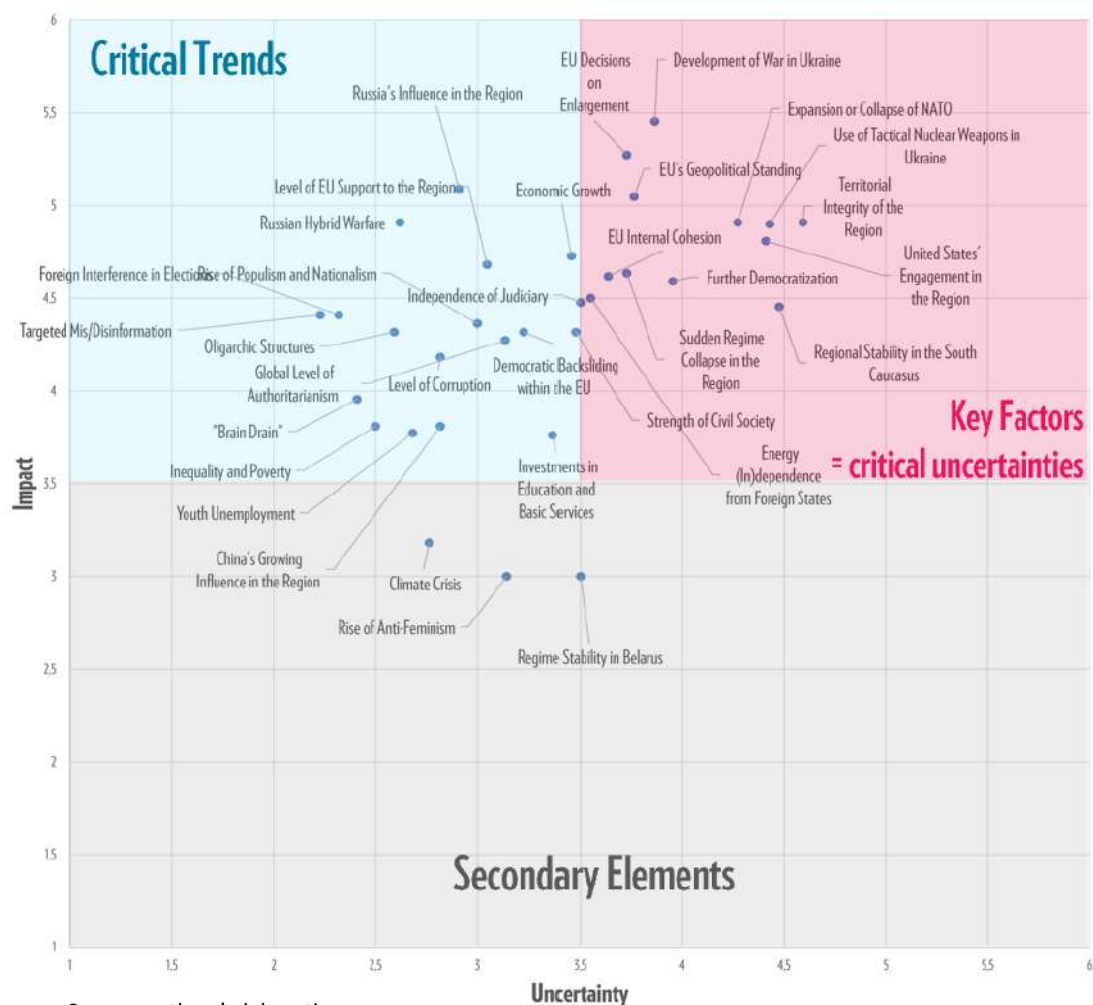
<sup>10</sup> For example: “BiH-Croatia Gas Pipeline” and “Extraction of rare earths” were both first put under the label “Economy” and then merged under the consolidated key factor title “Energy and Resource Independence from Foreign States”.



**Figure 1: Western Balkans 2035 - Influential factors by uncertainty and impact (expert survey results)**



**Figure 2: Eastern Neighbourhood 2035 - Influential factors by uncertainty and impact (expert survey results)**



In addition to the uncertainty and impact analysis, we scanned survey results for so-called weak signals – emerging issues or early indicators of change that only a subset of experts might see as relevant, due to their particular point of view or expertise (see Ansoff, 1975). To detect these weak signals, we defined them as factors that have a relatively low aggregate level of impact and a high level of disagreement (variance) in expert ratings. The potential weak signal for the WB according to this definition turned out to be climate change. For the EN, potential weak signals are climate crisis, investments in education and basic services, and youth unemployment. These topics represent potential weak signals in relation to the group composition and were introduced as such into the subsequent scenario construction, asking experts to explore their relevance to the topic of future FMI up to 2035.

## 2.4. Scenario Development

Following the processing of survey results and preparing them for expert analysis, the process moved into the scenario development phase, starting with two online workshops. These region-specific workshops, informed by an extended pre-selection of factors derived from the survey analysis, facilitated the selection of four to five critical uncertainties based on the metrics of uncertainty and impact. This process involved a



moderated discussion, where participants deliberated on a selection of factors that they considered to constitute the main dimensions of the scenarios. Survey results were particularly valuable in identifying factors where expert responses had significant disagreement. Such disagreement was treated as a potential indicator of underestimated significance. We made sure that the discussion reflected on these disagreements in a nuanced way, examining the potential grounds for divergence of opinion within the group. This step also allowed experts to bring back nuances and details of individual aggregated factors to substantiate their arguments for the selection of a particular key uncertainty.

Once participants selected the key factors, they proceeded to develop alternative projections in groups about the future state of the factors. This process produced a matrix with deliberated potential outcomes for each given factor, exploring how plausible changes to it would materialise by the end of the given timeframe (i.e., 2035). We encouraged participants to imagine both the radical ends of a spectrum and plausible states in between, usually resulting in three to six mutually exclusive and collectively exhaustive alternative assumptions. The outcome of this step was a jointly agreed set of critical uncertainties, supported by a clear rationale for inclusion or exclusion, and alternative projections for each of them, forming the foundation for the scenario matrix and subsequent narrative development.

In the second round of workshops, participants began their scenario construction in person by combining the above-mentioned projections into internally consistent ‘raw’ scenarios. As preparation, they received another primer summarising the results of the first workshop and setting the scope and goals of the current one. During this workshop, participants worked through a timeline using an *image of the future* - which described what a plausible threat landscape could look like in the EU’s neighbourhood in 2035 - as a point of departure. This image of the future was then expanded counter-chronologically, using a back-casting technique, to create the *history of the future*, describing what plausible path could lead from today to the relevant image of the future (Bressan et al., 2024, p. 4). This method, combined with the facilitator’s guidance, made sure that participants avoided extrapolating from the present to the future, thereby avoiding recency bias.

Following the in-person workshops, the final scenario step extended scenarios into detailed narratives with plausible trajectories from the present to 2035. Here, our team worked to weave a coherent narrative, fill potential gaps, and eliminate minor discrepancies that might have arisen due to the time constraints of the threat scanning exercises, while maintaining the experts’ original assessment of the big picture state of the future and its pathway<sup>11</sup>. In the case of questions that could not be resolved internally, we contacted participants from each scenario development group to validate our interpretations and ensure that the integrity of their analysis was maintained. The resulting scenarios are thus internally cohesive, reviewed and stress-tested by a diverse group of experts from the REUNIR consortium.

These methodological steps ensure that the final scenarios serve as instructive points of departure for the identification of strategic entry points for policy solutions to counter threats that may arise in the mid- to long-term in the remaining time of the REUNIR project (see Bressan et al., 2024, p. 11). Thus, the methodology helps trace critical junctures for foreign malign influence, mechanisms of threat emergence, and implications for policy (Bressan et al., 2019a, p. 11). In effect, the scenarios thus help inform the EU’s

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<sup>11</sup> Originally, each workshop group developed four scenarios, which was then reduced to three for the final publication. For each sub-region, the scenario with the least internal coherence and most logical gaps was eliminated, to ensure a final set of six thoroughly constructed scenarios.

policy responses where innovation is still required to best navigate and command the neighbourhoods' volatile threat landscape.

#### 2.4.1. Key Uncertainty Selection and Projections (Online workshops)

The WB half-day online workshop took place on the 13<sup>th</sup> of May, and included 18 experts (11 men, 7 women) from all partners within the REUNIR consortium and facilitation by GPPi, plus one external expert from the European Movement in Serbia, who was invited by REUNIR partners for optimal topical coverage. The EN3 half-day online workshop took place on the 16<sup>th</sup> of June with 18 attendees from the REUNIR consortium (10 women, 8 men).

After a methodological primer, participants discussed the Delphi expert survey results to select four to five key uncertainties – highly impactful yet highly uncertain factors impacting each sub-region in 2035 - and develop projections as a basis for constructing scenario frameworks in each of the two workshops (Bressan et al. 2019a, p. 15).

Since survey results did not clearly produce a selection of four critical uncertainties for scenario development in the WB case (see Figure 1), the different factors' impact, uncertainty and relevance to the research question as well as any disagreement among experts was discussed in-depth with workshop participants, accounting for a variety of regional and subject matter expertise across the group. The discussion resulted in the selection of the following five key uncertainties for the state of democracy, security, economy, and EU accession prospects in the WB6 between 2030 and 2035:

- 1) The degrees of expansion or collapse of NATO;
- 2) EU (non-)enlargement;
- 3) Democratisation (including independence of the judiciary in the WB6);
- 4) The outcome of the war in Ukraine and effects on the WB6; and
- 5) The level of economic growth (or decline) (see Table 2).

The influence of the US in the WB6 also ranked highly uncertain, although not as impactful as other factors (see Figure 1). It was not selected as a key uncertainty, as the further process would anyway involve an in-depth exploration of external state actors' role, including the US' role. Internal cohesion of the EU also ranked relatively uncertain and impactful, but experts agreed that it could be treated as an enabling or constricting factor of any decision on EU (non-)enlargement, which is ultimately more critical for the future of the WB6. The economic development was formally not rated extremely uncertain by aggregate expert assessment, but experts in the scenario group argued that it would be important to explore potential foreign influence and dependency in the economic domain. Territorial integrity of the region, which was rated similarly critical as the economy on average, was not selected as a key uncertainty by the group because of a desire to focus on external dimension (EU, NATO, Ukraine and the wider security architecture) as more critical to REUNIR's research question in contrast to any intra-regional conflicts.

The critical uncertainties for the EN3 in 2035 (see Figure 2 above) selected by participants were:

- 1) Territorial integrity of the EN3 region;
- 2) Expansion or collapse of NATO combined with U.S.' engagement in the EN3 region;
- 3) Whether there would be a use of tactical nuclear weapons in Ukraine; and
- 4) The degree of further democratisation (or democratic decline) in the EN3 (see Table 3).

Compared to the WB6 factor selection, this result was more straightforward as the aggregate factor rating produced a clearer picture of factors with the highest uncertainty and impact (see upper right corner in Figure 2) compared to other factors. In contrast to the WB6 workshops and consistent with survey results, experts did not choose a factor related to the European Union (e.g. its decisions on enlargement) as one of the most critical uncertainties for the EN3 by 2035, because the EU's decision on enlargement, its geopolitical standing and internal cohesion were relevant but ultimately ranked as less uncertain compared to other factors, including the United States' and NATO's role.

**Table 2: Western Balkans 2035 - Influential factors by category and projections**

| Critical Uncertainties and Alternative Projections<br>(high impact, high uncertainty)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Critical Trends<br>(high impact, relatively less uncertain)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Factor 1: Expansion/Collapse of NATO</p> <p>Projection 1: NATO-32 stays</p> <p>Projection 2: NATO is gone</p> <p>Projection 3: Expansion (NATO32 + all WB6)</p> <p>Projection 4: NATO plus/minus (some leave, all WB6 are in) "reformatted"</p> <p>Projection 5: Smaller NATO, no additional WB6</p> <p>Projection 6: Expansion, but no additional WB6</p> <p>Factor 2 : EU Enlargement</p> <p>Projection 1: Formally ended</p> <p>Projection 2: Practically dead</p> <p>Projection 3: Enlargement within acquis</p> <p>Projection 4: Enlargement without acquis</p> <p>Factor 3: Democratization &amp; Independence of Judiciary</p> <p>Projection 1: All liberal democracies</p> <p>Projection 2: All consolidated autocracies</p> <p>Projection 3: All hybrid regimes</p> <p>Projection 4: Mix (democracy/ autocracy&amp; hybrid regimes in WB6)</p> <p>Factor 4: War in Ukraine Outcome and Effects</p> <p>Projection 1: Ukraine won, pro-EU boost in WB6</p> <p>Projection 2: Russia won, pro-Russia boost in WB6</p> <p>Projection 3: Continued War and continued isolation of Russia + open implications for WB6</p> <p>Projection 4: Ukraine divided, part joined the EU (discontent in the WB6)</p> <p>Projection 5: Ukraine divided, part joins the EU (WB6 are also happy about enlargement)</p> <p>Factor 5: Economic Growth</p> <p>Projection 1: Economic Boom</p> <p>Projection 2: Slightly better (status quo continued)</p> <p>Projection 3: Slightly worse (decline)</p> <p>Projection 4: Major recession/crisis</p> | <ul style="list-style-type: none"> <li>• Corruption</li> <li>• EU Support to WB6</li> <li>• Brain Drain</li> <li>• Inequality and Poverty</li> <li>• Foreign Interference in Elections</li> <li>• <u>Russian Influence</u> &amp; Hybrid Warfare</li> <li>• Energy Dependence on Foreign States</li> <li>• Youth Unemployment</li> <li>• Global Authoritarianism</li> <li>• Migration to WB6</li> <li>• Investment in Education and Basic Services</li> <li>• Populism and Nationalism</li> <li>• Democratic backsliding in the EU</li> <li>• EU Geopolitical Standing</li> <li>• Strength of Civil Society</li> <li>• Chinese Influence</li> <li>• Ethno-Nationalist Tensions</li> <li>• Oligarchic Structures</li> <li>• Territorial Integrity of the Region</li> </ul> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>Potential Weak Signals<br/>(seemingly low impact but high disagreement overall)</p> <ul style="list-style-type: none"> <li>• Climate Crisis</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>Secondary Elements<br/>(relatively less impactful and uncertain)</p> <ul style="list-style-type: none"> <li>• Rise of Anti-Feminism</li> <li>• Turkey's Influence</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

**Table 3: Eastern Neighbourhood 2035 - Influential factors by category and projections**

| Critical Uncertainties and Alternative Projections<br>(high impact, high uncertainty)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Critical Trends<br>(high impact, relatively less uncertain)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Factor 1: Use of Tactical Nuclear Weapons in Ukraine<br>Projection 1: No use, or threatening<br>Projection 2: Nuclear blackmail<br>Projection 3: Extensive use<br>Projection 4: Limited use<br>Factor 2: Territorial Integrity of the Region<br>Projection 1: All EN3 fully regain control<br>Projection 2: Increasing contestation everywhere<br>Projection 3: All lose more territory<br>Projection 4: All gain additional territory<br>Projection 5: All fully regain control<br>Projection 6: No changes<br>Factor 3: NATO & US Engagement<br>Projection 1: Both actors are constructive<br>Projection 2: Mixed engagement across<br>UKR/MD/GEO<br>Projection 3: Adverse<br>Projection 4: Constructive<br>Factor 4: Further Democratization<br>Projection 1: All EN3 are liberal democracies<br>Projection 2: All EN3 are hybrid regimes<br>Projection 3: Mixed regimes<br>Projection 4: All consolidated autocracies | <ul style="list-style-type: none"> <li>• Targeted Mis/Disinformation</li> <li>• Foreign Interference in Elections</li> <li>• Global Levels of Authoritarianism</li> <li>• Brain Drain</li> <li>• Inequality and Poverty</li> <li>• Chinas Growing Influence in the Region</li> <li>• Level of Corruption</li> <li>• Global Authoritarianism</li> <li>• Russian Hybrid Warfare &amp; Influence</li> <li>• Level of EU-Support to the Region</li> <li>• Level of EU-Support to the Region</li> <li>• Populism and Nationalism</li> <li>• Democratic Backsliding in the EU</li> <li>• Economic Growth</li> <li>• Strength of Civil Society</li> <li>• Independence of Judiciary</li> <li>• Rise of Populism and Nationalism</li> </ul> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Potential Weak Signals<br>(seemingly low impact but high disagreement overall)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>• Climate Crisis</li> <li>• Investments in Education and Basic Services</li> <li>• Youth Unemployment</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Secondary Elements<br>(relatively less impactful and uncertain)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>• Rise of Anti-Feminism</li> <li>• Regime Stability in Belarus</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

In both workshops, participants then defined the key uncertainties and developed projections, i.e. possible, collectively exhaustive and mutually exclusive states of each key uncertainty in 2035. These projections serve as the basis for the morphological analysis to construct scenario frameworks in the in-person workshops (Johansen, 2018). The projections and scenario framework development deliberately pushed the scenarios into the extremes on these factors, to expand the realm of imagination of plausible scenarios and explore fundamental uncertainty. Table 2 and 3 summarise all factors considered for scenario development, by category, including the key uncertainty projections for the WB6 and EN3 respectively. As the tables show, this step allowed participants to leverage their regional and subject-matter expertise to bring nuance back into the key uncertainty definitions and projections. For example, the results show that experts in the WB6 workshop assessed the perceptions in the WB6 as the most relevant consequence of Ukraine's potential EU accession to further explore (see Table 2, Factor 4).

### 2.4.2. Scenario development (In-Person Workshops)

The REUNIR scenario workshop for the WB6 was held in Belgrade on 27 May 2025 as part of the project's midterm conference. Hosted at the Belgrade Centre for Security Policy (BCSP), the half-day workshop involved 18 experts from 10 partner institutions of the REUNIR project and two external experts from local organisations who were invited for optimal regional and topical coverage. The REUNIR scenario workshop for the EN3 took place at REUNIR's midterm conference in Tbilisi (26-27 June 2025). Hosted by the Georgian Institute for Politics (GIP), it involved 13 experts from 10 REUNIR partner institutions, equally with two representatives from local organisations to complement the group's expertise.

Both workshops followed the same structure. Based on the selected key uncertainties and projections from the online workshops, participants constructed scenario frameworks according to a reduced morphological analysis approach and scenario crosses (Johansen, 2018; Schwartz, 1991; see Bressan et al., 2021). To uncover uncertainty-based threats, the selection of scenario frameworks was steered in a way to discard more likely scenarios that represent a mere continuation of the past and instead explore still plausible futures that are notably different from today. In working groups, they then constructed scenarios consisting of images and histories of the future, applying backcasting techniques (Robinson, 1990).

To gain insights relevant to REUNIR's research question, the underrated and impactful foreign influence attempts collected via the Delphi expert survey were added as either wild cards or supporting developments into the scenarios, to enrich the scenarios and allow exploring the effects of potential future FMI. For a full list of survey-based FMI mechanisms used, see Annex A. The resulting scenarios were discussed in the workshops with participating experts, focusing on lessons about threats to the resilience of CCs until 2035. The research team refined the workshop results in consultation with the workshop groups to achieve three concise, coherent scenarios for each sub-region (six scenarios in total).

## 2.5. Scenario Analysis

The full narrative scenarios are included in the annex for the WB6 (Annex B) and EN3 (Annex C) respectively. Each scenario includes a summary of the situation in 2035, the timeline of key developments and a summary on foreign influence in each scenario. In the following sections of this paper, we analyse the scenarios in the light of the research question, i.e. focusing on the role that external state actors are assumed to play until 2035 and the way they could interfere in ways that undermine the WB6's and EN3's resilience and accession prospects, before discussing the results for both sub-regions in comparison in section 2.5.3. In addition, Table 4 gives an overview of geopolitical actors, influence mechanisms and enlargement outcomes per scenario.

**Table 4:** Overview of geopolitical actors, influence mechanisms, and enlargement outcome per scenario

|                                 | Russia                                                                                                                                                | USA                                                                                                                                                                                   | China                                                                                                                                                            | Gulf countries                                                                                                            | Turkey                                                                                                         | EU Enlargement                                                                                                                                                    |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Western Balkans (WB6) Scenarios |                                                                                                                                                       |                                                                                                                                                                                       |                                                                                                                                                                  |                                                                                                                           |                                                                                                                |                                                                                                                                                                   |
| “Nationalist EU+ without NATO”  | Uses disinformation and instrumentalise s orthodox church in WB6 to rally support and undermine EU integration                                        | Retreats from Europe as an ally (NATO dissolved, troops withdrawn) but reasserts itself as a covert, more authoritarian foreign influence actor (e.g. supporting coup in Montenegro ) |                                                                                                                                                                  |                                                                                                                           |                                                                                                                | New enlargement logic: enlargement is no longer a transformational project, but a pragmatic choice to gain geopolitical significance                              |
| “Hybrid Boom”                   | Rewards Western Balkan governments circumventing EU sanctions with free trade talks; drastically intensifies cultural diplomacy to maintain influence | Almost complete retreat from Europe and NATO                                                                                                                                          | Heavy infrastructure , energy and small business investment; Belt and Road Forum hosted in Albania; invitation for Serbia; Bosnia and Montenegro to joins BRICS+ | Heavy investments in infrastructure and luxury resorts; funding of religious programmes and Islamic education initiatives | Takes over former KFOR bases in agreement with Kosovo as new security guarantor                                | EU enlargement progress stalls and accession is (at least temporarily) off the table; economic engagement in WB6 maintained only through Global Gateway programme |
| “Authoritarian Crisis”          | Influence through energy deals; deepening of ties with Serbia; misinformation to exploit ethnic divides                                               |                                                                                                                                                                                       | Seizes opportunity to invest in Digital and AI industries in Kosovo and Albania; creates tech and financial dependence                                           | Minor role: transactional economic investment that sustain ruling networks                                                | Influence through arms sales to Serbia, infrastructure projects, and aid packages; relevant partner for Balkan | EU integration is officially declared dead                                                                                                                        |

|                                            |                                                                                                                                                                                           |  |                                                                                                             |                              |                                       |                                                                                                             |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|-------------------------------------------------------------------------------------------------------------|------------------------------|---------------------------------------|-------------------------------------------------------------------------------------------------------------|
|                                            |                                                                                                                                                                                           |  |                                                                                                             |                              | governments as EU engagement declines |                                                                                                             |
| EU's Eastern Neighbourhood (EN3) Scenarios |                                                                                                                                                                                           |  |                                                                                                             |                              |                                       |                                                                                                             |
| "Nuclear Umbrella"                         | Spread of pro-Russian narratives in Moldova and Georgia (including propaganda and misinformation )                                                                                        |  | Heavy infrastructure investments                                                                            | Financial support for elites |                                       | Halt in EU integration, new security logic: giving Ukraine the means to deter Russia (with nuclear weapons) |
| "Emerging from Chaos"                      | 2025: large-scale infiltration of Moldovan and Georgian intelligence by Russia; later FMI capabilities crumble after nuclear attack on Ukraine, Russian regime collapse and ensuing chaos |  | Initially: strong military support to Russia's war effort; later: pivot to supporting Ukrainian sovereignty |                              |                                       | Ukraine, Moldova and Georgia have joined the EU                                                             |
| "Dream Team"                               | FMI capabilities seriously reduced, but FMI attempts include energy blackmail, cultural means to sustain and create Soviet-era nostalgia                                                  |  | China provides spyware to Georgian government                                                               |                              |                                       | Ukraine, Moldova and Georgia have joined the EU                                                             |



### 2.5.1. Western Balkans Scenario Analysis

#### **WB6 Scenario 1: “Nationalist EU+ without NATO”**

The first WB6 scenario, *Nationalist EU+ without NATO* (see Annex B), was constructed around the following framework for 2035, resulting from the expert-based key uncertainty identification and projections development described in section 2.4.:

- a) A mix of democratic, hybrid and autocratic regimes in the WB6;
- b) A collapse of NATO;
- c) EU enlargement to all WB6 without adherence to the *acquis*;
- d) A slightly worse economy in the WB6; and
- e) A divided Ukraine, part of which joins the EU.

The dominant enlargement dynamic in this scenario is a more nationalist, less democratic EU that is more pragmatic on enlargement and follows a logic of enlargement for geopolitical influence. It admits even those WB6 countries that slide into authoritarianism, as countries in the EU themselves become less democratic. Enlargement loses its transformative ambition, as criteria on democracy and the rule of law are not enforced any more. As a result, the EU in 2035 is larger but weaker and less politically coherent and, at the end of developments until 2035, also deeply divided. With the transformative power of the EU lost and no other democratic partners in sight, the WB6 are marked by low and declining resilience against foreign authoritarian interference.

Russia exploits existing discontent and the declining societal and economic resilience of the region, instrumentalising the Orthodox Church and using disinformation to stir up protests against political agreements, ensuring instability persists despite EU enlargement. The US retreats from Europe as an ally (NATO dissolved, U.S. troops withdrawn) but reasserts itself as a covert, more authoritarian foreign influence actor, for example supporting coup in Montenegro, undermining stability and societal cohesion. It is playing a role akin to other external geopolitical spoilers.

#### **WB6 Scenario 2: “Hybrid Boom”**

The second WB6 scenario, *Hybrid Boom*, was constructed around the projections of:

- a) all WB6 being hybrid regimes;
- b) a smaller NATO with no additional WB6 members;
- c) the enlargement process not formally ended but practically dead;
- d) a Russian win against Ukraine and a subsequent pro-Russian boost in the Western Balkans; and
- e) an economic boom.

The enlargement reality in 2035 is one in which progress stalls and accession is not formally, but in reality, off the table. EU economic engagement in the WB6 is maintained only through the Global Gateway program, which relegates the countries to external partners which the EU treats in a transactional manner. This development is mainly driven by 1.) selected WB6 countries starting to position themselves against the EU, allying with Russia and 2.) enlargement fatigue inside the EU (e.g. a French referendum against enlargement).

The consequences for the WB6 are overlapping layers of external influence and relationships to different geopolitical actors, while the EU does not play a primary role as a partner anymore. Hybrid regimes balance

fractured societies, but the prosperity that results from high foreign investments enables them to manage the situation without major disruptions by 2035. Resurgent influence from Russia and investments from both China and Gulf countries contribute to stark economic growth in the WB6, which benefit from new investments in selected industries.

In this second scenario, Russia has strong capacities to influence the region, leading some WB6 to break with EU sanctions on Russia as early as 2026 and subsequently increasing its influence through religious, cultural and political channels. Gulf countries exploit investment opportunities in infrastructure and tourism, supporting the local economy, paired with religious education and exchange initiatives to strengthen societal ties to the Gulf. The US has left NATO by 2035 and almost completely retreats from Europe, leaving a vacuum (esp. in Kosovo). In the near future, a more nationalist, isolationist and authoritarian US is still a welcome partner for some WB6, but it soon retreats. Turkey, in agreement with the Kosovo leadership, becomes a new security guarantor with increased military presence after the US has withdrawn and left NATO.

### **WB6 Scenario 3: “Authoritarian Crisis”**

The third WB6 scenario, *Authoritarian Crisis*, was built around:

- a) EU enlargement for the WB6 formally ending;
- b) NATO remaining at 32 members;
- c) all of the WB6 being consolidated autocracies;
- d) a major economic recession; and
- e) a divided Ukraine partly joining the EU.

The enlargement logic in this scenario is EU integration of the WB6 formally off the table, as the EU abandons an increasingly authoritarian South-Eastern neighbourhood. Even earlier, far-right parties gain traction in the EU and campaign against WB6 enlargement, alienating the WB6 population. The relationship steadily deteriorates and sours between the populations in the WB6 and the EU. Another driver is EU economic decline and a Eurozone financial crisis by the end of the decade (in 2028/29), which sharply reduces European investments and EU financial support for the WB, deepening perceptions of abandonment, while enlargement prospects become less credible. The EU follows a strategy of containment that accepts authoritarian rule in the WB6 for stability, but with a declining role for the EU in the region.

In the WB6, a mix of economic hardship and crisis, climate shocks and divisive disinformation campaigns of unclear origins lead to an autocratisation spiral. Any external economic relations with geopolitical actors only benefit autocratic elites and worsen inequality, while also trapping the region in elite-driven, transactional foreign relations that contribute to its descent into authoritarianism. They provide short-term stability but entrench dependency, inequality, and autocratic rule.

Early on in the *Authoritarian Crisis* scenario, an increasingly authoritarian US publicly supports far-right parties in the EU who undermine enlargement and disenfranchise migrants from the WB6, reinforcing the perception that democratic backsliding is the new norm. Later on, the US brokers a deal that ends the war in Ukraine and enables Ukraine’s EU accession, while the WB6 are left behind. Russia exerts influence through energy deals, deepening ties with Serbia, and misinformation to exploit ethnic divides, also supporting elite-led autocratisation. China seizes the opportunity to invest in digital and A.I. industries, creating technological and economic dependencies as a patron unconstrained by democratic governance standards. Turkey increasingly sells weapons to the region and steps in with infrastructure investment and aid packages,

becoming a relevant partner for Balkan governments as EU engagement declines. Gulf countries participate in transactional partnerships that sustain ruling networks.

### ***Comparison and Lessons on Foreign Influence (WB6)***

Standing out in all scenarios, the EU is the main foreign actor that drives developments in the WB6. In no scenario do the actions of other external state actors alone or mainly shape the future of the WB6. In all of them, it is either EU action or its retreat and the ensuing vacuum that crucially enables any other foreign geopolitical actor to step in. On the one hand, this might reflect the bias of an EU-funded research project with many EU-based expert participants and experts on the role of the EU in the WB6. On the other hand, the scenario development process was explicitly geared to mitigate a pro-EU bias - starting from a very open investigation of key influential factors and with specific foreign influence developments, interference attempts and wild cards of non-EU external state actors inserted into the scenario generation process. We therefore interpret the outstanding relevance of EU (in-)action towards the WB6 in the scenarios not as the result of a biased process but indicating real potential to impact the future of the WB6 until 2035, independent from major geopolitical influences that could compete with the EU's influence.

In contrast to the existing literature, our scenarios more thoroughly investigate the role of the United States, notable via the uncertainty around the US in NATO, in connection with a US role for European security in brokering peace in Ukraine, and the role of the US in (mainly in rhetoric) supporting autocratisation worldwide. Overall, however, the US does not step up significantly as a foreign actor in the WB6 in any of our scenarios. A near-future US meddling to prop up autocratic leaders is a possibility according to the scenarios, but with no sustained and long-term role as an investor or significant ally to anyone in the region. The scenarios suggest that the US could be a factor mainly a) in the shorter term as inspiring authoritarian tendencies and b) by leaving a vacuum, which is especially consequential if the EU does not step in or retreats at the same time. This suggests that the US might eventually be relegated to being one foreign meddler undermining democratic resilience among many. This is plausible, as ties to the WB6 existed mainly through the US being a democratically and security provider for wider Europe in the past, both of which it does not continue to be in these scenarios. Comparing this with the initial expert-based survey assessments, the US was not rated as particularly influential for the region. It was rated as having a very uncertain role (i.e. US retreat not being a clear, directional trend), but in the process it became clear that this uncertainty related more to the shorter-term future and the US being seen as generally unpredictable yet not so consequential for the WB6.

Russia exerts strong influence on the WB6 in the scenarios. On the one hand, this is not surprising as Russian hybrid influence and destabilisation was classified by experts through the survey as an impactful trend (with a clear direction towards more, not less, FMI in the WB6). Since the scenarios were particularly geared towards detecting foreign authoritarian influence with geopolitical ambitions, there was ample room for Russia as a relevant player. On the other hand, Russia's role was no key factor for the scenarios and none of the externally inserted scenario developments or wild cards had an explicit relationship with Russia. Nonetheless, Russia is the predominant anti-democratic threat actor, underscoring the country's relevance even further. In the scenarios, Russia continues to exert influence with security and political means, leveraging relationships with both elites and society, through cultural and religious channels, diplomatic pressure, and FMI in the information domain to exploit societal divides. Energy dependence also plays a role, especially in the near-term (informed by current developments). Free trade talks are leveraged as an incentive in one scenario in which the EU retreats as an economic partner.

Notably, none of the scenarios foresee a more direct military threat from Russia to the WB6, not even through support for individual countries in any armed confrontation. Territorial integrity of the WB6 was rated as relatively impactful and somewhat uncertain, but ultimately less critical than other factors. Given the expert and scenario group composition and project and scenario workshop context, however, we cannot rule out that discussion of outright war in the WB6 was a taboo among the participant group that the methodology could not offset, and which the scenario process fell short of exploring as a clear limitation.

In the existing literature of scenarios, the role of Turkey in the WB6 remained relatively underexplored. In two out of three REUNIR scenarios, Turkey steps in as either a relevant security provider (Kosovo, after US retreat) or with defence industry ties (to Serbia). This mirrors the literature regarding Turkey's role as a relevant power for regional security (see section 2.1). Experts also consider it plausible for Turkey to not just step in as a transactional investor in the WB6 as the EU retreats, but also with aid packages to WB6 countries, suggesting a strategy that creates deeper ties and builds on kinship. The analysis shows that cultural ties to some of the WB6 and geographic proximity, as well as potential like-minded interests and opportunities to step in as EU influence declines, make Turkey's resurgent role in the WB6 up to 2035 plausible.

The Gulf countries play a minor role as investors in the *Authoritarian Crisis* scenario, in which WB6 elites sell out their countries in dire economic conditions. In the *Hybrid Boom* scenario, however, they take a primary role with heavy investments in infrastructure and tourism and fund religious education and exchange programmes. Gulf countries become a backstop to a new mix of foreign influences, in which Turkey, for example, is a more significant security provider. Their investments enable economic growth, de facto supporting the hybrid regime reality which other external state actors shape and exploit for their benefit. In the *Hybrid Boom* case, the scenario group itself saw the Gulf countries' role as external investor as a critical condition to enable an economic boom while the EU retreats from the WB6. In the *Authoritarian Crisis* scenario, the group receives Gulf investments as external inputs based on the expert survey results. In this case, bad economic conditions in the WB6 are not an attractive investment opportunity. Beyond any potential economic benefits, experts saw no other significant interest or driver of Gulf states to become more active in the WB6.

China plays a significant role as investor in both the *Authoritarian Crisis* and *Hybrid Boom* scenarios. Even in the autocratic scenario, where the WB6 economy is not thriving, China seizes the opportunity to invest in digital and A.I. industries in the WB6 markets, creating technological and financial dependencies but not obviously exploiting them to any specific end. In the *Hybrid Boom* scenario, China seizes the opportunity to also invest in energy and small businesses. In this latter case, the group was requested to also explore a political role of China in inviting WB6 countries into the BRICS+ format (suggested as a plausible, underrated possibility for FMI in the expert survey). Both the BRICS+ and Belt and Road Initiative underpin Chinese ambitions in the region which go beyond transactional investments, but do not take the form of any apparent societal or cultural influence attempts in the WB6 scenarios.

Overall, none of the WB6 scenarios touch upon direct coordination or intentional cooperation between these different geopolitical state actors to achieve their goals or influence the WB6. Rather, individual FMI in response to new opportunities or goals exist side-by-side.

Throughout the WB6 scenarios, the impact of the war in Ukraine – although selected as a key uncertainty – remained relatively underdeveloped, pointing to it being selected due to Ukraine's current prominence in the European security and enlargement debate rather than its true relevance for the WB6 themselves. The most

relevant aspect to the WB6 future is the effect that any EU accession of Ukraine would have, and how this would be received by leadership and the population in the WB6, especially if these countries were not to be admitted into the EU as well.

### 2.5.2. Eastern Neighbourhood Scenario Analysis

#### **EN3 Scenario 1: 'Nuclear Umbrella'**

The first EN3 scenario, *Nuclear Umbrella* (see Annex C), was constructed around the projections of:

- a.) all EN3 being hybrid regimes by 2035;
- b.) nuclear blackmail taking place;
- c.) uneven NATO and US engagement across the EN3; and
- d.) increasing contestation of territorial control in all EN3.

The enlargement reality in 2035 is no EU or NATO membership for the EN3. Instead, the EU focuses on deterrence for security and leaves the countries trapped in a buffer zone between the EU and Russia. The so-called West turns to a deterrence logic, supporting Ukraine by arming it with nuclear weapons. Democratic freedoms in the EN3 decline, with a downturn in resilience. By the mid-2030s, these overlapping layers of foreign influence define a new order in which sovereignty is transactional and deterrence, not Western integration, is the organising principle of regional stability. Geopolitical state actors exploit the vacuum and foreign influence becomes deeply rooted in EN3 local governance structures.

Russia interferes in the near future, continuing to spread pro-Russian narratives and disinformation in Moldova and Georgia and exploiting covert elite influence networks. It promotes narratives for Russian reintegration of Transnistria and Abkhazia among the population in those territories while backing authoritarian elites who trade sovereignty for stability.

China leverages major infrastructure and energy investments to create debt dependency and policy influence, quietly aligning regional development with its own economic and strategic priorities. The UAE and other Gulf actors embed themselves through financial partnerships with elites in the EN3, reinforcing oligarchic governance across Moldova and Georgia.

#### **EN3 Scenario 2: "Emerging from Chaos"**

The second EN3 scenario, *Emerging from Chaos*, was constructed around the projections of:

- a.) a mix of democratic, hybrid and authoritarian regimes in the EN3;
- b.) limited use of nuclear weapons in Ukraine;
- c.) constructive NATO and US engagement; and
- d.) all EN3 gaining additional territory.

The EU has enlarged, with Georgia and Moldova as new members, including the Eurozone and Schengen. Ukraine is also an EU member but continues to struggle with democratic decline as autocratic forces gain political traction in the parliament. After a decade of turmoil, the EN3 have become integrated with the rest of the EU, but future stability is threatened by autocratisation in Ukraine and uncertainty about the effects of the Russian regime's collapse, which happens in the scenario.

Foreign influence in the EN3 after 2025 has evolved from overt Russian manipulation in the years after 2025 to a more complex, multi-actor contest for influence. The US and NATO keep a strong presence in the region, pressuring Russia to pay reparations for the nuclear strike on Ukraine.

Russia's infiltration of Moldovan and Georgian institutions in the near future is aimed at obstructing reforms and maintaining leverage. Russia seeks to force Ukrainian capitulation with a limited nuclear strike. After Putin's death, the Russian regime disintegrates. This removes present-day Russia from the scene and significantly reduces its FMI capabilities, intent and focus on the EN3, with a deeply fragile and fragmented political landscape in Russia instead. After years of chaos in southwestern Russian oblasts, these breakaway regions seek to join Ukraine and Georgia respectively. The vacuum Russia leaves behind allows pro-EU turns in Georgia and Moldova and EU accession of Ukraine.

China fills part of the vacuum, first as a strong supporter of Russia's defence industry. But towards 2035, it repositions itself as a postwar investor and partner to Ukraine. By 2035, Beijing's economic and technological engagement has become a key external force shaping Ukraine's governance and dependencies. While Beijing's support as a pivotal actor is welcome, encroaching Chinese influence in Ukraine's fragile democracy raises questions about its impact on the resilience of the country, which is now an EU member.

### ***EN3 Scenario 3: 'Dream Team'***

The third EN3 scenario, *Dream Team*, was constructed around the projections of:

- a.) all EN3 countries being liberal democracies by 2035;
- b.) no use or threat of nuclear weapons use in the region;
- c.) constructive NATO and US engagement; and
- d.) all EN3 fully regaining control of disputed territories.

By 2035, the EN3 is fully integrated into the Euro-Atlantic order. Ukraine, Georgia, and Moldova are members of both the EU and NATO, with Moldova also part of Schengen and the Eurozone. The EU has also become the primary driver of NATO expansion and rebuilding in the region after turmoil.

Russia is weakened, facing internal demands for independence and gradual democratisation. Putin's illness and death weaken his regime's stability, as fights about his succession start to expose deep internal fractures in leadership circles. This distraction allows Moldova to peacefully reintegrate Transnistria. Even as Russian troops are forced to withdraw from Abkhazia and South Ossetia, the country still seeks to retain its influence in Europe through energy blackmail by cutting gas supplies. Russia tries to evoke Soviet nostalgia in the EN3 through art and popular culture, but the impact is minimal.

China provides targeted technologies, such as spyware, to influence internal governance, exploiting transitional vulnerabilities while balancing its broader alignment with the West. In the near future, it thereby supports the Georgian crackdown on pro-democracy protesters and journalists. But due to public discontent over Russian meddling in Georgia, pro-EU forces still win a 2027 election in Georgia. At the same time, Turkey turns towards the West under new leadership and becomes geopolitically aligned with the EU.

In this scenario, the group was encouraged to include FMI developments despite the overall positive and peaceful outlook of the scenario. As a result, FMI through known trends – i.e. Russian meddling and Chinese spyware provision – still take place, but after interference is unveiled, backlash turns countries and societies



towards accountability, democracy and the EU. When the FMI becomes visible as malign interference through transparency, it can provoke public criticism.

### ***Comparison and Lessons on Foreign Influence (EN3)***

Across the three scenarios, the nature and intensity of the external state actors' influence differ. Russia, with its strong imperial ambitions for the whole region, is the most consistent forceful destabiliser: in *Nuclear Umbrella* it exploits elite networks, pushes disinformation, and seeks to forcibly integrate/annex parts of Moldova and Georgia into its territory; in *Emerging from Chaos*, it escalates further, infiltrating institutions and even launching a nuclear attack on Ukraine; in *Dream Team* it relies on energy blackmail, nostalgia-based narratives to influence public opinion, and spyware to limit democratic development. Russian FMI was an important trend rather than a key uncertainty for the scenario frameworks, so the results further underscore future threats from Russia to an even greater extent than in the WB6 scenarios. Russia's role in the EN3 scenarios also illustrates the value of scenarios to explore discontinuities and non-linear developments that shape foreign malign influencing and geopolitics more broadly, going beyond extrapolating current trends into the future. For instance, Russia is a malign actor at the beginning of the *Emerging from Chaos* scenario – even attacking Ukraine with a nuclear bomb – but its internal turmoil forces Russia to mostly withdraw and limit its influencing in the EN3 in later years. Here, the scenarios also add value by allowing to turn uncertainties and underrated possibilities into plausible scenarios to explore their effects and consequences: In the *Emerging from Chaos* scenario, EN3 countries regain territories from Russia, which is in internal turmoil.

China appears in the *Nuclear Umbrella* and *Emerging from Chaos* scenarios as an architect of strategic dependency - via infrastructure and energy projects and through initial military support to Russia followed by reconstruction-linked leverage respectively - while playing no explicit role in *Dream Team*. Regarding China, the EN3 scenarios also highlight the potential of discontinuity over a 10-year time horizon (2025-2035). For example, in the *Emerging from Chaos* scenario, China's early military support for Russia's invasion of Ukraine turns into Chinese postwar investment in alignment with the US and in support of Ukraine within a few years, indicating a change of Chinese FMI strategy amid Russia's nuclear weapons use and collapse – following from an assessment of China's strategy to be opportunistic and transactional rather than clearly aligned with Russian interests.

Gulf states enter the picture primarily in the *Nuclear Umbrella* scenario, where financial partnerships with elites reinforce oligarchic structures and dilute sovereignty, a dynamic absent from *Emerging from Chaos* and *Dream Team*. Even when asked to think outside of the probable realm, an involvement beyond financial influencing of Gulf countries in the EN3 was not considered relevant by the expert scenario groups.

The engagement of the US in the EN3 was, together with NATO engagement, one of the key uncertainties around which the EN3 scenario frameworks were constructed. In contrast to the WB6 scenarios (where US engagement was no key uncertainty), however, the scenarios did not include significant FMI of the US as a spoiler in the EN3 and the final set of EN3 scenarios does not explore a future in which the US leaves NATO. In the *Emerging from Chaos* scenario, the US engages constructively in support of Ukraine. Apart from that, the scenarios point towards NATO as the main relevant security actor in the EN3 (particularly regarding Ukraine), with the US mainly relevant through its role in NATO and any US role independent from NATO remains underexplored.



Beyond domestic political instability, the role of the EU and NATO across the scenarios clearly shapes the structural opportunities for influencing. Whereas EU enlargement in *Dream Team* and *Emerging from Chaos* creates environments where influencing is mitigated overall - although at different points in time - the EU's political withdrawal from EN3 in the *Nuclear Umbrella* scenario contributes to increasing FMI from other states.

The scenarios also highlight possible consequences of underexplored developments, for example that FMI from external state actors could also trigger a pro-democratic response in civil society. This is exemplified in the *Dream Team* scenario, as the uncovering of sustained Russian influence in Georgia causes public discontent in the society, which ultimately strengthens pro-European forces.

### 2.5.3. Discussion of Scenario Findings

In this chapter, we set out to develop scenarios on the WB6 and EN3 to identify and explore ways in which external state actors might undermine CC's security, economic and democratic resilience and EU accession prospects up to 2035, based on expert assessments and the structured scenario-building methodology described above. To facilitate an exploration of region-specific dynamics, we conducted the scenario-building process for the EN3 and WB6 separately. In this section, we summarise and discuss the cross-cutting findings in relation to the research question. Table 5 below discusses the implications of our findings for EU policy.

**Table 5:** Scenario implications for EU counter-FMI policy, by external state actor and domain

|                           | Security                                                                                                                               | Socio-Economic                                                                                                                                                                                                            | Political                                                                                                                                                                    |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Russia</b>             | <u>Primary</u> focus (direct military threat in EN3 and significant hybrid and covert attacks in WB6)                                  | <u>Secondary</u> focus, particularly relating to energy ties and in support of influence in the security and political domains                                                                                            | <u>Primary</u> focus overall, significant spoiler against EU accession and resilience                                                                                        |
| <b>China</b>              | <u>Secondary</u> focus on potential support to Russian war/hybrid war effort ( <u>primary</u> focus for ongoing wars, like in Ukraine) | <u>Primary</u> focus, avoiding potential for economic dependencies and self-interested investments that undermine resilience (supporting elite capture, oligarchy, inequality - even if in coordination with CCs/U.S./EU) | <u>Secondary</u> focus avoiding vacuum for China to leverage alternative cooperation formats in competition with the EU, and in support to non-democratic elites             |
| <b>USA:</b>               | <u>Primary</u> focus (on role as security provider in NATO for EN3, as potential instability actor in WB6)                             | <u>Limited</u> , mainly in relation and support of its role the security domain                                                                                                                                           | <u>Primary</u> focus as relevant supporter of resilience in EN3 through its presence (incl. NATO); potential of anti-democratic meddling and promotion of instability in WB6 |
| <b>Gulf states (GCC):</b> | Limited                                                                                                                                | <u>Primary</u> focus, avoiding potential for investments which undermine                                                                                                                                                  | <u>Secondary</u> focus, regarding implications of potential role                                                                                                             |

|         |                                                                                                                                        |                                                                                                                                                                                                                  |                                                                                                                                                               |
|---------|----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
|         |                                                                                                                                        | resilience (supporting non-democratic elite capture, oligarchic structures, inequality)                                                                                                                          | in religious education and exchange                                                                                                                           |
| Turkey: | <u>Primary</u> focus on role as potential security provider in the WB6 (incl. through NATO); <u>limited</u> focus on arms sales to EN3 | <u>Secondary</u> focus, on potential role of supporter of short-term resilience, especially in support of interests in the political domain (WB6); <u>limited</u> focus on Potential economic dependencies (EN3) | <u>Secondary</u> focus as actor in support in the political and cultural domain engaging selectively in areas/channels with existing ties and influence (WB6) |

Overall, it should be noted that the scenario process and the analysis are explicitly geared towards identifying threats and not towards exploring futures with positive opportunities that may arise from the external state actors under investigation (China, Russia, United States, Turkey and Gulf countries). While positive consequences of external state actors' influence still came up during scenario construction, the focus lay on how they might plausibly compete with and undermine EU accession prospects. This is a consequence of the project's research question and by no means intended to say that alternative futures in which these external state actors turn into constructive forces for resilience are impossible or implausible.

In sum, the expert-based survey assessments, scenario construction and analysis process produced evidence on uncertain future threats based on FMI from external state actors at multiple points. The survey-based assessments (see section 2.3) show how experts assess different external state actors' roles for the EN3 and WB6 in terms of impact and uncertainty, and which potential future FMI activities they assume to be underrated threats. These intermediary results fed into the development of scenarios, in which REUNIR researchers with a variety of expertise and knowledge on the military, economic and democratic systems in the CCs explored those possibilities further. While the results on the EN3 and WB6 are not directly comparable, as they resulted from two distinct scenario construction exercises with different experts and scenario framework conditions, we summarise the overall findings per external state actor below.

### ***Russia***

From our Delphi survey-based expert assessments, Russian FMI emerged as a critical trend in both regions and is expected to continue in the future. In line with this, Russian FMI is relevant across scenarios and security, economic and political systems. Even though the methodology was geared towards an exploration of uncertainties rather than trends – which should have taken the focus away from Russia and what we already know about the risks it poses – the Russian threat is predominant, showing that experts who participated in the process see Russian FMI as a significant threat to EN3 and WB6 resilience in the future. In the security domain, Russia is the predominant foreign actor that undermines resilience more than any other. This applies even more strongly to the EN3 (where Russia is and continues to be active with military, economic and political FMI) than the WB6 (where Russia does not pose a direct military threat in any scenario but interferes in ways that fuel conflict and undermine security-related resilience). The types of malign activities by Russia in the scenarios cover a wide spectrum up to the use of nuclear weapons to attack Ukraine.

While most of the Russian FMI tools applied in the scenarios are not new (given Russia's already high level of FMI), the scenarios allow us to explore discontinuity in Russia's engagement, especially the effects of a large-scale, consequential contingency like the death of Vladimir Putin and regime collapse in Russia. This would remove Russia as a relevant FMI actor in one scenario, opening up opportunities for the EN3 to regain control of previously occupied territories and significantly increase their resilience, especially regarding security. When Russian interference in the security domain (infiltration of intelligence services) is uncovered in one scenario, this leads to an anti-Russian backlash in the (Georgian) population, contributing to a dynamic in which societal mobilisation turns more strongly towards the EU – showing the potential of factors like transparency and trust in independent media and judiciary to also increase resilience and a turn towards the EU.

### ***United States***

The United States is underexplored as an external state actor in existing analyses on the future of the WB6 and EN3 and their EU accession prospects (see section 2.1). The expert survey assessment rated the US role as highly uncertain but limited in terms of impact on the future of resilience in the CCs for the WB6 and more impactful for the EN3, while the role of NATO was rated as a critical uncertainty for both sub-regions. Based on the scenario analysis, the role of the US is relevant in the near-time future and decreases over time into the future up to 2035. In the WB6, the US is expected to potentially inspire and fuel authoritarian tendencies, support and give legitimacy to anti-democratic leaders and practices that undermine resilience. It is also expected to potentially fuel uncertainty about security in the WB6 by unilaterally pushing for the resolution of existing disputes (e.g. about the recognition of Kosovo) in an unreliable and uncoordinated manner. The US could also leave a vacuum in the WB6 when it withdraws attention, (particularly from NATO, including presence in Kosovo), which is especially consequential for the EU if it does not either step in to fill the vacuum or even retreats as a security guarantor in the region at the same time as the US. In the EN3, US and NATO engagement was a critical uncertainty determining the overall scenario construction, but direct US FMI in the EN3 (independent of its role in NATO) does not appear in the scenarios and remains underexplored.

### ***China***

Already at the stage of the Delphi expert surveys, China was assessed as a relevant actor mainly in the economic domain, with the possibility of leveraging economic dependencies to a) coerce CCs into policies that serve China but undermine their resilience and b) go beyond and use economic frameworks and political formats such as BRICS+ as alternative frameworks for CCs in competition to EU membership. We inserted these survey-based assessments into the scenario process to make sure experts would leave no stone unturned in exploring the role that China could play in the EN3 and WB6. The resulting scenarios largely show China as an economic investor that exploits opportunities but largely refrains from meddling with clear malign intent. Chinese investment does, according to the scenarios, have a high chance of not increasing but rather undermining resilience in the CCs when it does not support sustainable, long-term growth and an equal distribution of wealth but mainly serves the interests of China and its elite partners in the CCs. In the EN3, China is expected to potentially create strategic dependencies via large-scale infrastructure and energy projects where EU investment is lacking, including in the reconstruction of Ukraine. EN3 scenarios also involve increased Chinese military support to Russia and its attacks on the region, although China's role is overall transactional and opportunistic rather than overtly aligned and coordinated with Russia.

## **Gulf states**

The Gulf states were not rated as a primary influence on the EN3 and WB6 at the survey stage, but some experts suggested ways in which Gulf countries could influence the regions through investments that undermine CCs resilience. As with China, we inserted these expert-based assessments of underrated potential threats into the scenario process to ensure that their potential future role is explored. In the scenarios, Gulf economic investments play a significant role in the WB6, with Gulf countries seizing economic opportunities in the absence of EU investments (e.g. investments in tourism, infrastructure), with a high potential of weighting economic benefits towards a handful of elites. Such economic inequality and related discontent could negatively affect economic and political resilience across affected WB6 countries. In addition, scenarios explore Gulf state funding of religious education and exchange programmes for Muslim populations in the WB6. The role of Gulf countries is less prominent in EN3 scenarios, but when investments occur, they also reinforce oligarchic structures and undermine sovereignty by creating significant dependencies on Gulf investors and their interests. Overall, and similar to China, expert groups did not see Gulf countries taking a more active role in intentionally undermining WB6 resilience with goals other than increasing their own economic benefit.

## **Turkey**

Turkey turns out to be a relevant actor in WB6 scenarios. In contrast to China and the Gulf states, Turkey's role goes beyond the economic domain, potentially including a relevant influence on CC security and societal dynamics in the WB6. In a scenario in which the US retreats from the WB6, negatively impacting security-related resilience, Turkey steps in to take responsibility for NATO bases in Kosovo. In addition, when WB6 countries are battling economic hardship and chaos, Turkey not only steps in as an economic investor but also provides aid in one of the scenarios. Experts did not portray Turkish influence in the WB6 as narrowly self-interested as China and the Gulf, but as a geopolitically relevant player that is interested in maintaining deeper ties of kinship.

## **EU**

Across all scenarios, we find that the EU plays a crucial role for the future of the EN3 and WB6. Apart from the threat Russia poses to the CCs – already today and into the future – most other external state actors' FMI is the result of a vacuum left by the EU and its lack of engagement in the resilience and accession of CCs across the various scenarios. The EU is the main actor that drives development in the WB6, independent of geopolitical competition from others. Multiple scenarios detail the consequences of (non-)enlargement. This is most significant in scenarios in which the EU completely withdraws from the region, leaving the field to other external state actors who end up undermining resilience with malign intent (mainly Russia, to a much lesser extent China) or inadvertently, as a consequence of pursuing their interests. EU enlargement *per se*, however, is not seen as a guarantor of resilience either. This becomes clear in a scenario in which the EU itself turns largely undemocratic and enlargement turns from a transformative project to a mere game for geopolitical influence, and in the scenarios in which individual new Member States still struggle with democratic decline post-accession. One crucial limitation is that the EU's role has been largely treated as a single actor in the scenarios. In some scenarios, political developments in individual Member States (e.g., elections in Germany and France) are explored. Since the focus of the research question and overall exercise was on other geopolitical state actors, dynamics between individual EU Member States and their bilateral or plurilateral engagements with CCs are not explored in detail in this scenario process.

## **Limitations**

While the methodology was designed to uncover additional insights into how external state actors can plausibly undermine CC resilience in the future, several limitations need to be kept in mind. As explained in the methodology section, the process was designed to offset biases to the greatest extent possible under the given constraints. Biases that arise from the scenario expert group composition, however, can never be fully offset. While we complemented scenario groups with expertise to fill gaps, it was not possible to have deep expertise on all relevant external state actors, CCs and domains of military, economic and democratic FMI and resilience present in all parts of the process (for details see section 2.2.). To offset this problem as best as possible, we opened the first expert survey round to participants beyond the consortium and actively contacted additional experts on all external state actors and their role in the CCs. Nevertheless, limited expertise regarding the role of external state actors like China and the Gulf states, which have a limited track-record of past interference in the CCs, needs to be considered when interpreting the results.

Intermediary results, such as the Delphi survey assessments and key factor selection, show recency and availability bias on the part of participants, which the process sought to subsequently reduce. For example, the expert group chose to include the outcome of the war in Ukraine as a key uncertainty influencing the resilience of the WB in 2035 and then failed to show large-scale consequences for the WB6 in the scenario development phase over the longer-term. This did not negatively impact the quality of the process or its results but shows that strong biases continue to play a role. Thus, the project context and extensive details on the methodology we provide in this paper need to be factored in when interpreting the results.

## 3. FORECASTING FOREIGN MALIGN INFLUENCE

### 3.1. Introduction

This section develops and assesses simulated quantitative forecasts about the calculable risk stemming from the foreign malign influence (FMI) of key external state actors to the security, socio-economic and democratic systems of the EN3 and WB6 (potential) CCs up to 2030 with a data-based modelling approach. This complements the largely qualitative REUNIR research to assess if and how data can be used to measure and predict the levels of FMI. Ultimately, this chapter aims to use existing quantitative data sources to further the understanding of how external state actors may undermine democratic, economic, and security structures in an increasingly geopolitically important region. To that end, the following section describes existing efforts to quantitatively measure and forecast FMI. Subsequently, we present and evaluate two supervised machine learning models that forecast FMI at two horizons: one year ahead and one month ahead. These models rely on indicators of interdependence and influence between external state actors and (potential) candidate countries. Based on the annual model we then create simulated forecasts until 2030 that estimate future levels of FMI under alternative extrapolations of indicators in the economic, political/cultural, and security domains.<sup>12</sup> As will be explained in section 3.4.3, we limit the quantitative analysis to the period until 2030 to account for the limitations of a data-driven approach to assess the calculable risks.

### 3.2. Literature Review

Despite a growing scholarly interest in FMI since 2016, the REUNIR methodology paper highlights the absence of a consensus definition (Bressan et al., 2024). Bressan et al. (2024) find that existing methods to measure FMI vary widely in their approaches and often only cover a certain subset of FMI, such as the impact of disinformation (see Sin et al., 2022) or economic independence (see Helmy, 2017). They do not cover the scope of the REUNIR project, which investigates the phenomenon of FMI broadly across the economic, political/cultural and security domains.

Among the data-based approaches to measuring FMI, Bressan et al. (2024) point to one exception to this pattern: the Formal Bilateral Influence Capacity Index (FBIC) (Moyer et al. 2021). The FBIC measures influence between states in the economic, political, and security domains, making it a useful proxy for measuring potential influence between states across a broad range of influence pathways. However, the index has two shortcomings that represent two major gaps in existing research about quantitative FMI measurements.

The first shortcoming is that measurements such as the FBIC focus on the influence capacity, but not on the intent or historically realised instances of FMI. Such conceptualisation does not capture the concepts of threats as used in the REUNIR, which is defined as the ‘function of capabilities and intent to exploit vulnerabilities’ (Bressan et al., 2024, p. 7). While influence capacity possibly covers part of the definition, such as capability and vulnerability, it does not account for the intent of the external actor to exert influence.

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<sup>12</sup> These domains correspond to the REUNIR project’s focus areas: military, socio-economic, and democratic. In this paper, to better reflect the underlying data, we use slightly different labels for the same domain: (1) security = military domain, (2) economic = socio-economic domain, (3) political/cultural = democratic domain (and socio-economic indicators related to culture/values).

The second shortcoming is the absence of up-to-date data. Just like the FBIC that ended data collection in 2023, many of the datasets and methodologies measuring FMI are not continuously updated and therefore cannot effectively be utilised to forecast future developments. As data-based forecasts learn patterns from history to make predictions about the future, information about developments in the most recent years is crucial for accurate predictions. This is particularly relevant for forecasting geopolitical phenomena such as FMI, which irregularly change over time, especially in today's geopolitically volatile world. Another example of this pattern is the AidData dataset (Custer et al., 2021), which was one of the most widely used sources to research Chinese influence in other states (Springman et al., 2022) but updates ended in 2021. Similarly, many event data sets (e.g., ICEWS, TERRIER and the Phoenix Dataset) that have been used in other assessments of foreign influence in the WB have been discontinued (e.g., Rustemi et al., 2019).

A data source that does not suffer from these shortcomings is the Resurgent Authoritarian Influence (RAI) tracker (Springman et al., 2022), which provides a novel approach to measuring FMI by applying natural language processing to domestic and international online news articles. This data is categorised into 22 areas of influencing and continuously updated until the end of 2024<sup>13</sup>. Overall, the RAI tracker shows the share of articles that mention Chinese or Russian influencing efforts in a given country and details the type of activity that is being reported (Springman et al., 2022). Thus, the RAI tracker covers seven out of nine (potential) candidate countries which REUNIR investigates (excluding Bosnia and Herzegovina, Montenegro) and from China and Russia as external state actors (but not other external state actors that REUNIR considers such as Turkey, the Gulf States or the United States).

As such, the RAI tracker is well suited to be used as a dependent variable in a supervised learning model with the goal to forecast the level of FMI, which Springman et al. (2023) put into practice. The authors combine the lagged RAI score, local economic conditions, as well as information about domestic political events to predict the level of reported influencing attempts of China and Russia one to seven months into the future (Springman et al., 2023). While this is a unique approach that creates actual predictions about the levels of FMI, it is not fully suitable for the REUNIR project. First, as it predicts only up to seven months ahead, an application of this forecast to make statements about the future until 2030 is limited. For instance, while monthly models capture high-frequency noise and seasonal dynamics, annual aggregation smooths short-term fluctuations and provides more stable trend estimates (Kourentzes et al. 2014) that are thus more suitable for modelling long term dynamics. Second, many of the predictor variables that complement to the RAI score in Springman et al.'s forecast (2023) focus on national economic and political conditions. Due to the focus on domestic political and economic conditions, the additional variables do not describe interdependencies between the influencer and the (potential) CCs, and do not represent all domains of the REUNIR project – particularly the security dimension.

In this Working Paper, we seek to expand on the forecasting work of Springman et al. (2023), by developing an annual forecast with independent variables that describe interdependencies and materialised influencing attempts across the security, socio-economic, and political dimensions to complement the scores of the RAI tracker. Moreover, on a more technical level, we compare the results to the predictive accuracy of a no-change model to enhance the performance evaluation of the forecasts and create simulated forecasts until

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<sup>13</sup> At the time of writing and using the RAI data, the data was only available until the end of 2024, but was recently continued until the end of 2025



2030. Taken together, this approach seeks to complement the other REUNIR Working Papers with a purely quantitative approach, to assess if and how well (the calculable risk of) FMI can be predicted and simulated.

Apart from such data-based approaches to assessing FMI, simulations built with agent-based modelling (ABM) are another avenue in contemporary research to quantitatively understand FMI (Padur et al., 2024). These approaches model interactions between actors in computer simulations to investigate possible outcomes of (subsets of) FMI. The focus of this methodology is primarily on exploring how localised interactions among states, leaders, or interest groups produce emergent geopolitical outcomes. Earlier applications of ABM to the study of geopolitics include simulations of ethnic conflict and state size dynamics based on power dynamics, geography, and military conflict (Cederman, 2002; 2003), studies of foreign policy dynamics (Epstein, 2006), and models simulating the spread of disinformation (Li et al., 2024). A contemporary example of ABM applied to an FMI related issue is the study of hybrid influence operations and cyberattacks dynamics by Padur et al. (2025).

However, the application of ABM in large-scale geopolitical forecasting remains constrained by methodological and practical limitations. For instance, ABM is typically driven by assumptions about agent behaviour that produce different simulated outcomes under varying settings of these assumptions. In many cases, it is not possible to use real-world data to inform those simulations, partially because highly granular, micro-level data - such as individual decision-making histories, behavioural rules, or subnational interaction trajectories – would be required. Most datasets in this holding information about geopolitics describe structural interactions at the country-year level, making it difficult to capture the kind of fine-grained interaction dynamics that ABM depend on.

Given these limitations, and considering that this research aims to produce scalable, data-driven forecasts over heterogeneous geopolitical regions using aggregated indicators, we rely on predictive supervised learning models rather than ABM approaches for the purpose of this research.

In the following sections, we present a combination of existing applicable data sources, such as the RAI tracker (Springman, 2022), data on interdependence between states (GEO-POWER-EU, 2025a) and other relevant data that can be used to proxy FMI from external state actors. With this data, we forecast the levels of FMI in WB6 and EN3, seeking to fill the gap of timely and geographically relevant forecasts across the security, socio-economic and democratic dimensions and simulations of long-term developments until 2030.

### 3.3. Research Design

To create the forecasts, we draw on security, economic and political/cultural indicators (according to REUNIR's three thematic focus areas) that describe the relationship between a CC and an external actor (EA) to predict the level of FMI. More specifically, these indicators operationalise REUNIR's definition of threat (function of capabilities and intent to exploit vulnerabilities' (Bressan et al., 2024, p. 7)), by describing interdependencies and materialised influencing attempts. The indicators for interdependence proxy the external state actors' capabilities and the (potential) CC's vulnerabilities. The materialised influencing indicators describe past acts of influencing as a measurement of materialised intent. Together, these indicators serve as independent variables that predict the level of influencing attempts (i.e., the dependent variable). Table 6 illustrates this operationalisation.

To include a predictive element into this operationalisation of threats, we introduce a time lag into the relationship by assuming that interdependence and materialised influencing efforts at time  $t=0$  can predict the level of influencing attempts at time  $t+1$ . In other words, we aim to forecast following year's level of influencing attempt based on the current year's level of interdependence and measured influencing.

Table 6: Operationalization of REUNIR's conceptualization of threats

|                           | Dependent Variable                      | Independent Variables                                       |
|---------------------------|-----------------------------------------|-------------------------------------------------------------|
| Threat Conceptualisation  | Threat ~                                | (capabilities * intent) + vulnerabilities                   |
| Threat Operationalisation | Influencing attempts ~<br>(Year $t+1$ ) | interdependence * materialised influencing<br>(Year $t=0$ ) |

To answer this Paper's research question - Which threats to the security, socio-economic and democratic systems of the EN3 and WB6 (potential) candidate countries may result from the malign geopolitical influence of Russia, China and other external state actors until 2035? - we then assess the predictive performance of the model and use it to simulate the levels of FMI until 2030 by extrapolating the independent variables under different conditions five years into the future. A more detailed description is state below in the chapter 'Modelling 2030' (Chapter 3.4.3)

### 3.3.1. Data

For the purpose of this research, we created two datasets that each cover seven of the nine (potential) CCs (Albania, Serbia, Kosovo, North Macedonia, Ukraine, Georgia, and Moldova) and two external state actors (China and Russia)<sup>14</sup>. The first dataset includes annual data covering the period 2011–2024 ( $N = 196$ )<sup>15</sup>, whereas the second comprises monthly data for the period 2018–2024 ( $N = 1,176$ ).

### 3.3.2. Dependent Variable

As a proxy measure for foreign malign influence, we use scores derived from the Resurgent Authoritarian Influence (RAI) dataset (Springman et al, 2022). The RAI score consists of scraped international, domestic and regional online news for incidents of Russian and Chinese influencing efforts in foreign countries and indicates the ratio of scraped articles that mention foreign influencing to all of the scraped articles per month / per year, with RAI being categorised into seven themes that are again divided into 20 event categories (Table 7) (Springman et al., 2022). We utilize the RAI score that is based on all 20 event categories as our main dependent variable and calculate three sub scores out of it: By only counting the scores of the 20 categories that apply to economic, security or political/cultural influencing attempts, we create scores for each domain of the REUNIR project (sub-RAI scores). Table 7 lists the associated domains for each category. As we proxy FMI through the RAI score in the following sections, the term FMI is used and understood in terms of 'foreign

<sup>14</sup> The candidate countries Montenegro and Bosnia and Herzegovina and other external state actors, such as Turkey, the United States and the United Arab Emirates could not be considered as the relevant data is not available for those countries.

<sup>15</sup> The dependent variable is available from 2012-2024. Due to the time lag, the independent variables thus start in 2011 and the testing of the model ends in 2023 (with IVs from 2023 and the DV from 2024).

malign influencing attempts’, rather than materialised ‘foreign malign influence’, consistent with the definition of FMI provided in the overall introduction of this Working Paper.

While the RAI data is the most suitable, advanced and accurate measure of FMI publicly available, some limitations remain. First, the temporal coverage of the RAI data only ranges from 2012 and end in 2024. Therefore, the historical training data to train the supervised model on is limited to 13 years. Second, the geographical coverage is limited to China and Russia as external state actors and does not cover the REUNIR-relevant (potential) candidate countries Montenegro and Bosnia and Herzegovina. Thus, the level of FMI cannot be compared to other external state actors and does not provide a complete picture about all countries relevant to the REUNIR project.

Second, as noted by Wibbels et al. (2024), deriving data from news coverage inevitably introduces three particularly relevant forms of bias. For instance, more recent reporting is typically overrepresented because older material is harder to retrieve, leading to a gradual increase in article counts over time. Moreover, only outlets with stable and continuous online infrastructures can be included, which limits coverage in countries with weaker web architectures. Finally, the well-known biases of news organisations - such as a preference for urban over rural reporting and for English-speaking contexts - are inherently reflected in the resulting dataset. Despite these limitations, the RAI score is the most suitable indicator for this project due to its spatial and temporal coverage as well as granularity of measurement.

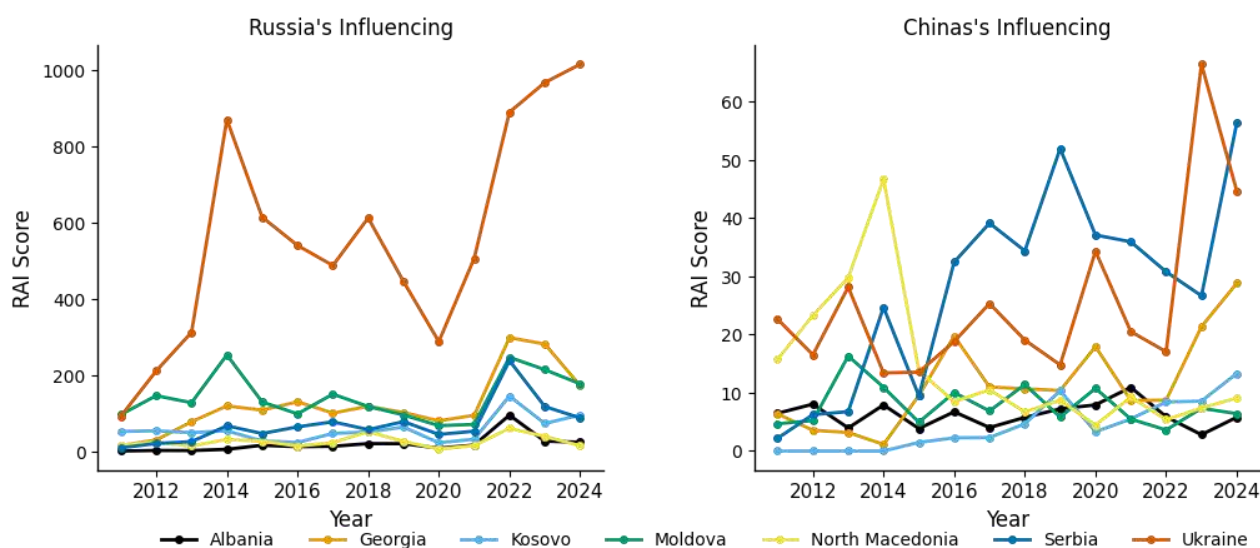
**Table 7:** RAI themes and event categories based on Springman et al. (2022, p. 7)

| Theme                 | Definition                                                                                                 | Category               | REUNIR Domain        |
|-----------------------|------------------------------------------------------------------------------------------------------------|------------------------|----------------------|
| Soft Power            | Attempts to change attitudes or beliefs of public or influence policy through the mobilisation of citizens | Diaspora Activation    | Political / Cultural |
|                       |                                                                                                            | Media Campaign         |                      |
|                       |                                                                                                            | Cultural Activity      |                      |
| Hard Power            | Attempts to strengthen or weaken the military capacity of or military ties with incumbent regimes          | Security Transfer      | Security             |
|                       |                                                                                                            | Security Exercise      |                      |
|                       |                                                                                                            | Security Engagement    |                      |
|                       |                                                                                                            | Security Presence      |                      |
| Economic Power        | Attempts to strengthen or weaken the economic capacity of or economic ties with incumbent regimes          | Aid Operation          | Economic             |
|                       |                                                                                                            | Investment Action      |                      |
|                       |                                                                                                            | Trade Action           |                      |
|                       |                                                                                                            | Trade Agreement        |                      |
| Diplomacy             | Attempts to strengthen or weaken the diplomatic standing of or ties with incumbent regimes                 | Diplomatic Engagement  | Cultural             |
|                       |                                                                                                            | Diplomatic Relations   |                      |
|                       |                                                                                                            | Diplomatic Action      |                      |
|                       |                                                                                                            | Diplomatic Statement   |                      |
|                       |                                                                                                            | Diplomatic Visit       |                      |
| Domestic Interference | Attempts to directly influence the policies or capacity of incumbent regimes through non-military actions  | Intelligence Operation | Security             |
|                       |                                                                                                            | Policy Intervention    | Political / Cultural |
|                       |                                                                                                            | Cyber Operation        | Security             |
|                       |                                                                                                            | Tech Transfer          | Economic             |

Source: Springman et al. (2022, p. 7). The column ‘REUNIR Domain’ was added by the authors.

Figure 3 displays the RAI scores for Chinese and Russian influence in the seven featured (potential) CCs. Most notable is that the scale for both external state actors varies widely, which indicates that the proportion of newspaper articles that report Russian influence attempts is substantially higher in most CCs compared to China. Among the seven investigated CCs, the maximum value for Russian FMI is 1014,23 for Ukraine in 2024, whereas the maximal value for Chinese FMI lies at 66,43 for Ukraine in 2023. The average score across all countries for Russian influencing efforts is 152,19 (std 216) and for China 14,39 (std. 13,45). Hence, Russia's FMI is much larger based on average as well as maximum measurements compared to China. The three CCs that experience the highest Russian FMI on average are: Ukraine (597,23), Moldova (147,51) and Georgia (133,57). For China, the top three countries are: Serbia (30,15), Ukraine (25,59) and North Macedonia (14,12).

**Figure 3:** RAI scores for China and Russia 2012-2024



Note. The Y-axis scales are different

### 3.3.3. Independent Variables – Annual Data

Following the structure of REUNIR's thematic focus areas (security, socio-economic, and democratic), independent variables (IVs) are collected from openly available sources that mirror economic, political/cultural and security domains. In total, the annual dataset features 12 IVs that describe the relationship between a (potential) CC and an external actor. A full list, including the data source and detailed description can be found in Annex D. All variables that describe interdependencies were retrieved from the GEO-POWER-EU Interdependence Database (GEO-POWER-EU, 2025a), unless stated otherwise. The GEO-POWER-EU database is product of the GEO-POWER-EU Horizon research project (GEO-POWER-EU, 2025b) and specifically collects data about the interdependencies between the EN3 and the WB6 and external state actors, making the database suitable and up to date for this paper's research. Overall, all data sources were selected based on the criteria of (1) geographical and temporal relevance, (2) thematic proximity, and (3) common usage in relevant research fields.

The variables describing economic interdependencies in the annual dataset are trade (sum of imports and exports of goods, services and raw materials), financial inflows (sum of foreign direct investment and remittances), and gross external debt between a CC and an external actor. To account for the different impacts

of these absolute numbers on the varying economies of the CCs, the variables are all calculated as a percentage of a (potential) CC's GDP. Moreover, the size of development assistance in absolute terms is included.

To depict political and cultural interdependencies, the forecasting model includes variables on the number of cultural institutions of external state actors in CCs. Furthermore, the share of students and migrants of CCs studying/living abroad in China and Russia, as well as the share of migrants of a China and Russia living in a (potential) candidate country are part of the dataset. Security-related interdependencies are depicted through the number of military troops deployed with consent in (potential) candidate countries by external state actors and the size of military equipment transfers.

To depict materialised influencing activities as a proxy for past intent, the model includes the lagged RAI score from each previous year, including sub-RAI scores for economic, political/cultural and security influencing efforts (based on the 22 categories) (Springman et al, 2022). Moreover, variables about the number of sanctions (military, political and economic) from the Global Sanctions Database (Felbermayr et al., 2020; Yalcin et al., 2025) and cyber-attacks retrieved from the European Repository of Cyber Incidents dataset (Zettl-Schabath et al., 2025) as well as Maryland University's Cyber Event dataset (Harry et al., 2018) imposed by external state actors to (potential) candidate countries and the natural logarithm of the number of conflict fatalities based on the Uppsala Conflict Data Program (UCDP) Georeferenced Event Dataset (Davies et al., 2024; Sundberg et al., 2013) are included in the model. We also include dummy variables for each external actor and CC as well as an indicator variable for the respective year. All in all, the compiled annual data covers a timespan from 2011-2024 (N = 196).

### 3.3.4. Independent Variables – Monthly Data

The monthly dataset includes all the annual variables except the conflict fatalities (UCDP) and holds them constant for each month of the year. Moreover, an annual independent variable on the number of leader meetings is added (GEO-POWER-EU, 2025a)<sup>16</sup>. To better describe monthly variations in the data, we include monthly export and import data in absolute numbers retrieved from the UN Comtrade database (United Nations Statistics Division, 2025) and event data rating the degree of conflictual behaviour between countries based on newspaper articles, retrieved from the Political Event Classification, Attributes, and Types (POLECAT) dataset (Scarborough et al., 2023).

Moreover, monthly conflict data operationalized through a count of conflict events and the natural logarithm of conflict fatalities from the Armed Conflict Location and Event Dataset (ACLED) (ACLED, 2025; Raleigh et al., 2010) are added. As the data availability of ACLED and POLECAT only starts in 2018, the timespan of the dataset is adjusted to 2018-2024 (N = 1,176). To avoid doubling information, the ACLED data replaces the UCDP variable in the monthly dataset<sup>17</sup>. Annual measurements of import and exports were kept, as they are measured in percentage of the (potential) candidate country's GDP, and therefore do not duplicate information of the UN Comtrade statistics. The RAI score and sub scores are available on a monthly basis as well.

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<sup>16</sup> As data availability starts in 2017 for this variable, it aligns with the time horizon of ACLED and POLECAT variables and is added to the monthly dataset as well, yet it's not included in the yearly dataset that starts in 2011.

<sup>17</sup> This paper uses ACLED instead of UCDP to proxy security influencing, as it covers a broader spectrum of event types, which better suits the hybrid nature of foreign malign influencing.

### 3.3.5. Empirical Model

To construct the forecasts, this study employs a supervised learning approach with an elastic net regression model combined with expanding window cross-validation, scaling of the variables, and a 70–30 train–test split with hyperparameter tuning on the train set. Elastic nets integrate L1 (Lasso) and L2 (Ridge) regularisation, offering a robust approach that balances variable selection and coefficient shrinkage (Zou et al., 2005). This modelling strategy is chosen due to the comparatively small sample size, the large number of predictors and their potential multicollinearity, as well as the inherent complexity of forecasting geopolitical phenomena. Other advantages of regularised regressions for forecasting are that they are less prone to overfitting, include automatic variable selection and are offer interpretability (Zou et al., 2005). Other more complex models such as random forests, neural nets or boosted trees are not included to safeguard methodological integrity in face of the small sample size resulting from limited data availability – particularly for the annual model.

Model performance is evaluated on a ~30% out of sample test set, which reduces the risk of overfitting and allows a better assessment of model generalisability (Colaresi et al., 2017). To avoid data leakage, the most recent years/months are chosen for the test set. For the annual dataset, these are the years 2020-2023 (=28.6 %) and for the monthly dataset all months of 2023 and 2024, except for December 2024 (27.4 %). Due to the lagged nature of the dataset, the observation of December 2024 for the monthly and the whole year 2024 for the annual dataset are not included in the test set.

To evaluate the performance of the model, the out of sample model metrics mean absolute error (MAE), root mean squared error (RMSE) and the r-squared score ( $R^2$ ) are compared to the same metrics of a no-change naïve benchmark. This benchmark forecasts the value of a past year/month (time =0) as the value for the following year/month (time +1) for the entire test set. For example, the naïve benchmark assumes the RAI score of 2021 to be the same in 2022, the RAI score of 2022 to be the same in 2023 and so forth. For easier comparison across models, the ratio between the metrics of the model and the benchmark are reported as RMSE and MAE ratios (e.g. MAE Model/MAE Benchmark). Thus, values smaller than 1 signal better performance compared to the baseline and vice versa.

## 3.4. Results

### 3.4.1. Model Performance

The following section displays the model performance for the monthly and annual model, as well as for regional and thematic sub-forecasts. Table 8 illustrates the model results for the elastic net model across all countries and external state actors, tested in the timeframe 2020-2023. Overall, the metrics suggest a modest model fit for the annual model with a mean absolute error (MAE) of 49,1, a root mean squared error (RMSE) of 96,71 and an  $R^2$  of 0,806. This means that, on average, the elastic net forecasts the RAI score with a difference of about 48 points between the predicted and the actual values - on a scale from 0 to 1,014. In other words, the model's predictions deviate from the true RAI scores by around 48 points. Similarly, the RMSE of 97.55 indicates that some of these prediction errors are considerably larger, as this measure penalizes larger deviations more strongly than smaller ones. The  $R^2$  of 0.806 shows that the model explains roughly 80 % of the variation in RAI scores, suggesting that it captures the general pattern of changes in the data well.

**Table 8: Model fit metrics of annual and monthly model**

| Model                            | RMSE   | MAE   | R <sup>2</sup> | RMSE-Ratio | MAE-Ratio |
|----------------------------------|--------|-------|----------------|------------|-----------|
| No-change benchmark (Annual)     | 81,82  | 41,73 | 0,863          | 1,18       | 1,17      |
| Elastic Net regression (Annual)  | 96, 71 | 49,10 | 0,806          |            |           |
| No-change benchmark (Monthly)    | 66,20  | 34,74 | 0,931          | 2,05       | 1,55      |
| Elastic Net regression (Monthly) | 135,62 | 53,99 | 0,711          |            |           |

Compared to the no-change benchmark, which yields an MAE of 41,73, an RMSE of 81,82, and an  $R^2$  of 0,863, the elastic net produces somewhat larger errors and explains slightly less of the variance in the data. Overall, the elastic net's MAE is about 17 % and its RMSE about 18 % higher than those of the benchmark, indicating that while the model reproduces the overall trends in RAI scores reasonably well, it does not outperform a simple no-change forecast in terms of predictive accuracy.

The monthly model shows a similar pattern as the annual model, as it does not outperform the no-change benchmark. However, with an MAE of 53,99, RMSE of 135,62, and  $R^2$  of 0,711, it does not only perform worse than the annual model in absolute numbers, but also in relative terms to the monthly no-change benchmark. The RMSE-ratio increases from 1,18 for the annual model to 2,05 for the monthly model, while the MAE-ratio increases from 1,17 to 1,55.

Table 9 displays the models and error ratios for smaller regional models that only include one of the two external state actors but all (potential) CCs. This seeks to investigate if isolating external state actors improves predictive accuracy by e.g., enhancing the model's capacity to isolate actor specific forms of FMI. The results hint towards the possibility that more geographically focused models can improve predictive accuracy and even outperform a no-change benchmark, but the results are not conclusive. For example, the monthly elastic net algorithm that is trained and tested on the dataset that only includes China as an external actor outperforms the no-change benchmark model with an MAE-ratio of 0,84 and an RMSE-ratio of 0,8. However, as the results for the other annual and monthly do not show substantial improvements over the models in Table 8, this claim requires further investigation.



**Table 9: Model fit metrics of external actor-specific models**

| Model                                | RMSE   | MAE    | R2    | RMSE-Ratio | MAE-Ratio | N   |
|--------------------------------------|--------|--------|-------|------------|-----------|-----|
| No-change benchmark China (Annual)   | 12,75  | 7,37   | 0,39  |            |           |     |
| China Elastic Net Model (Annual)     | 14,88  | 9,78   | 0,16  | 1,17       | 1,33      | 98  |
| No-change benchmark Russia (Annual)  | 115,01 | 76,10  | 0,83  |            |           |     |
| Russia Elastic Net Model (Annual)    | 222,31 | 126,36 | 0,36  | 1,93       | 1,66      | 98  |
| No-change benchmark China (Monthly)  | 34,87  | 15,23  | 0,141 |            |           |     |
| China Elastic Net Model (Monthly)    | 27,79  | 12,75  | 0,275 | 0,80       | 0,84      | 588 |
| No-change benchmark Russia (Monthly) | 86,88  | 54,24  | 0,927 |            |           |     |
| Russia Elastic Net Model (Monthly)   | 170,56 | 88,77  | 0,719 | 1,96       | 1,64      | 588 |

Note. Values below 1,1 are highlighted to show model performance close to better than the baseline

Table 10 holds the results for models that include all CCs and external state actors, but only used economic, security or political/cultural independent variables to predict their corresponding subset of the RAI score. For example, the economic models only included independent variables such as trade or financial inflows and to predict a RAI score that only measures the economic FMI categories. Overall, the results suggest that domain-specific modelling tends to improve the predictive performance when compared to models that predict the level of FMI across all three domains as shown in Table 8. The RMSE-ratios are better for each domain across the annual and monthly models, hinting that domain-specific models tend to make comparatively smaller errors. Although the models in Table 10 suggests performance improvements over the general model and better results than the benchmark in some cases, the domain-specific models do not consistently outperform a no-change model either.

**Table 10: MAE ratios for thematic models (annual)**

| Model                | Economic | Security | Political | All Domains |
|----------------------|----------|----------|-----------|-------------|
| MAE-Ratio (Annual)   | 1,36     | 1,17     | 1,24      | 1,17        |
| RMSE-Ratio (Annual)  | 0,99     | 1,15     | 1,14      | 1,18        |
| MAE-Ratio (Monthly)  | 1,10     | 1,18     | 1,21      | 1,55        |
| RMSE-Ratio (Monthly) | 1,02     | 1,24     | 1,05      | 2,05        |

Note. Values below 1,1 are highlighted to show model performance close to better than the baseline

### 3.4.2. Feature importance

Table 11 presents the feature (i.e., variable) importance for three selected models: the two models presented in Table 8, which include all (potential) CCs and external state actors on an annual and monthly level, as well as the monthly model that outperforms the no-change benchmark (with China as the only external actor) from Table 9. The feature importance of this paper's main model – the annual model that includes all external state actors and CCs – allows several insights into the relative contribution of the different predictors to the model's performance.

First, variables from all three REUNIR domains – economic, political/cultural, and security – are among the six most important predictors. This demonstrates that including indicators from across domains improves the model's ability to predict FMI levels. Among those, economic and political/cultural variables appear to drive the prediction most strongly, as they dominate the first five ranks of important features. Second, some

variables, such as the migration indicators, might not appear as intuitive predictors of FMI at first glance. However, their high feature importance could suggest that migration patterns are consistently related to differences in FMI levels across countries, even if their ability to explain short-term variation might be limited. Third, history-related predictors, in particular the lagged RAI (sub-)scores, are among the strongest predictors in the model. This finding implies that past FMI trajectories are informative for anticipating subsequent FMI.

Table 11: Ranked variable importance across models

| Rank | Full Annual Model                | Full Monthly Model                         | China Monthly Model                     |
|------|----------------------------------|--------------------------------------------|-----------------------------------------|
| 1    | Economic RAI Sub Score (lagged)  | Security RAI Sub Score (lagged)*           | Economic RAI Sub Score (lagged)*        |
| 2    | Share of EA Migrants in CC       | Share of EA Migrants in CC                 | RAI Sub Score (lagged)*                 |
| 3    | Share of CC Migrants in EA       | ACLED monthly event count*                 | Finance Inflows                         |
| 4    | RAI Score (lagged)               | Stationed Military Troops (negative        | Security RAI Sub Score (lagged)*        |
| 5    | Political RAI Sub Score (lagged) | Finance Inflow)                            | Development assistance                  |
| 6    | Security RAI Sub Score (lagged)  | Political RAI Sub Score (lagged)*          | Political RAI Sub Score (lagged)*       |
| 7    | Trade                            | Polecat Security Influence attempts*       | Monthly Imports*                        |
| 8    | Number of Cyber attacks          | Monthly Imports*                           | Number of Leader Meetings               |
| 9    | Stationed Military Troops        | CC Students studying in EA (negative)      | Number of Cultural Institutions         |
| 10   | CC Students studying in EA       | Polecat Political Influencing attempts*    | Gross External Debt                     |
| 11   | Total number of fatalities       | Development Assistance                     | Trade                                   |
| 12   | Number of Sanctions              | Number of cultural institutions (negative) | Polecat Political Influencing attempts* |
| 13   | /                                | /                                          | Monthly Exports*                        |

\* monthly variables

Both monthly models portray a broadly similar picture, though with some differences in the ordering of variables. In the full monthly model, the security RAI sub-score (lagged) replaces the economic RAI sub-score (lagged) as the most important predictor. Overall, security related variables rank higher compared to the annual model. Moreover, event-based and higher-frequency indicators, such as ACLED monthly event count and monthly imports, also gain importance in the monthly specification compared to the annual one. The China-only monthly model shares several top-ranked predictors with the other two models, particularly the economic and security RAI sub-scores (lagged). However, it assigns greater weight to financial and trade-related variables, including finance inflows, development assistance, and monthly imports, as well as to measures of diplomatic and cultural activity such as the number of leader meetings and the number of cultural institutions.

Overall, all three models highlight a consistent set of predictors across domains, with some variation depending on temporal resolution and model scope. Structural variables such as the lagged RAI sub-scores,

and migration measures remain highly important in all models, while the inclusion of monthly data brings more dynamic indicators - especially those related to security events and financial flows - into prominence.

However, it is worth highlighting that these feature importances do not indicate causal relationships, particularly, because the above models are predictive models and not built for causal inference (Pichler et al., 2023). In this paper's case, the elastic net's L1 and L2 penalties shrink coefficients toward zero and can exclude correlated predictors entirely (Zou et al., 2005). As a result, the reported feature importances reflect the relative contribution of variables to the model's predictive performance rather than the strength or direction of a causal effect. The values should therefore be interpreted as indications of which features the model relies on the most to forecast FMI, rather than as evidence of underlying causal mechanisms.

### 3.4.3. Modelling 2030

This section employs the above trained annual model to analyse the potential FMI-related threat levels to the security, economic, and political/cultural systems of (potential) CCs up to 2030. To this end, we adopt a two-step approach that generates simulated long-term forecasts. This allows us to explore plausible future dynamics based on the models' internal logic and observed patterns.

As a first step, we extrapolate all the independent variables with prediction intervals (PI) until 2030 using an exponential smoothing algorithm where the PI's signal the uncertainty of the extrapolation. Second, by taking the mean of the extrapolation and the upper and lower bound of a 95 % PI, three different paths of development are simulated: one where the status quo continues (mean extrapolation); one where the variables decrease substantially more (lower PI bound); and one where the increase is higher (upper PI bound).

Third, this allows us to model how the RAI Score might differ if the values of independent variables in one domain are increasing and compare this to the 'status quo' extrapolation. For example, we create a simulation in which political/cultural and security trends develop 'as expected' but economic indicators for FMI strongly increase. This can be simulated by extrapolating all political/cultural and security variables using the average extrapolation but choosing the higher bound for economic variables. In this example, by fitting the previously trained elastic net regression on this specific combination of extrapolated variables, the predicted RAI score reveals how much more FMI can be expected if economic interdependencies and influence increases more than current trends suggest.

It is important to note that such an extrapolative approach is subject to far-reaching methodological assumptions and that therefore the predictive accuracy must be examined critically. First, extrapolating the IVs with an exponential smoothing algorithm multiple years into the future assumes linear, incremental developments over a long period of time. Very often, real life developments do not mirror such extrapolative behaviour. These results must therefore not be considered in isolation to the uncertainty-based foresight part of this deliverable. For this reason, we opted to restrict the extrapolation and the analysis of the results to 2030.<sup>18</sup> Doing so, we seek to make the results more robust, as the biases introduced through these assumptions as well as overall uncertainty increases over time further into the future.

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<sup>18</sup> For comparison, we tested extending the projection horizon to 2035 and it did not substantially affect the simulated forecast results due to the model's linear structure.

Second, because the previously trained elastic net shows only modest predictive performance, using it to generate simulated forecasts through 2030 is likely to impact the predictive accuracy of the output. To address this challenge, the focus of the following analysis lies on the relative changes in prediction when manipulating individual variables, instead of the absolute predicted values. Moreover, as we apply the same elastic net regression to all combinations of extrapolated variables, we assume the errors of prediction to be constant, meaning they do not bias an analysis of the relative changes. Despite these limitations, this approach allows gaining insights about the level of impact that economic, political/cultural and security developments might have under different courses of development.

In terms of results, Figure 4 illustrates the simulated forecasts for FMI in North Macedonia, Serbia and Kosovo. The plots suggest a similar pattern of potential FMI from China and Russia, as economic influence levels (in blue colour) dominates the possible total level of FMI. In other words, major increases or decreases of the baseline extrapolations are forecasted if economic interdependence and influence happen at higher or lower levels. Changes to the levels of security FMI (green) – even at the higher or lower bound of the prediction interval – do not substantially impact the simulated total RAI score. Similarly, changes in the cultural realm (orange) have little effect. For Kosovo, only changes in the economic domain lead to changes of the simulated average FMI level. Overall, the simulated forecasts stipulate that the total FMI level increases in all countries but North Macedonia, where it slightly decreases (Russia) or largely stays the same (China).

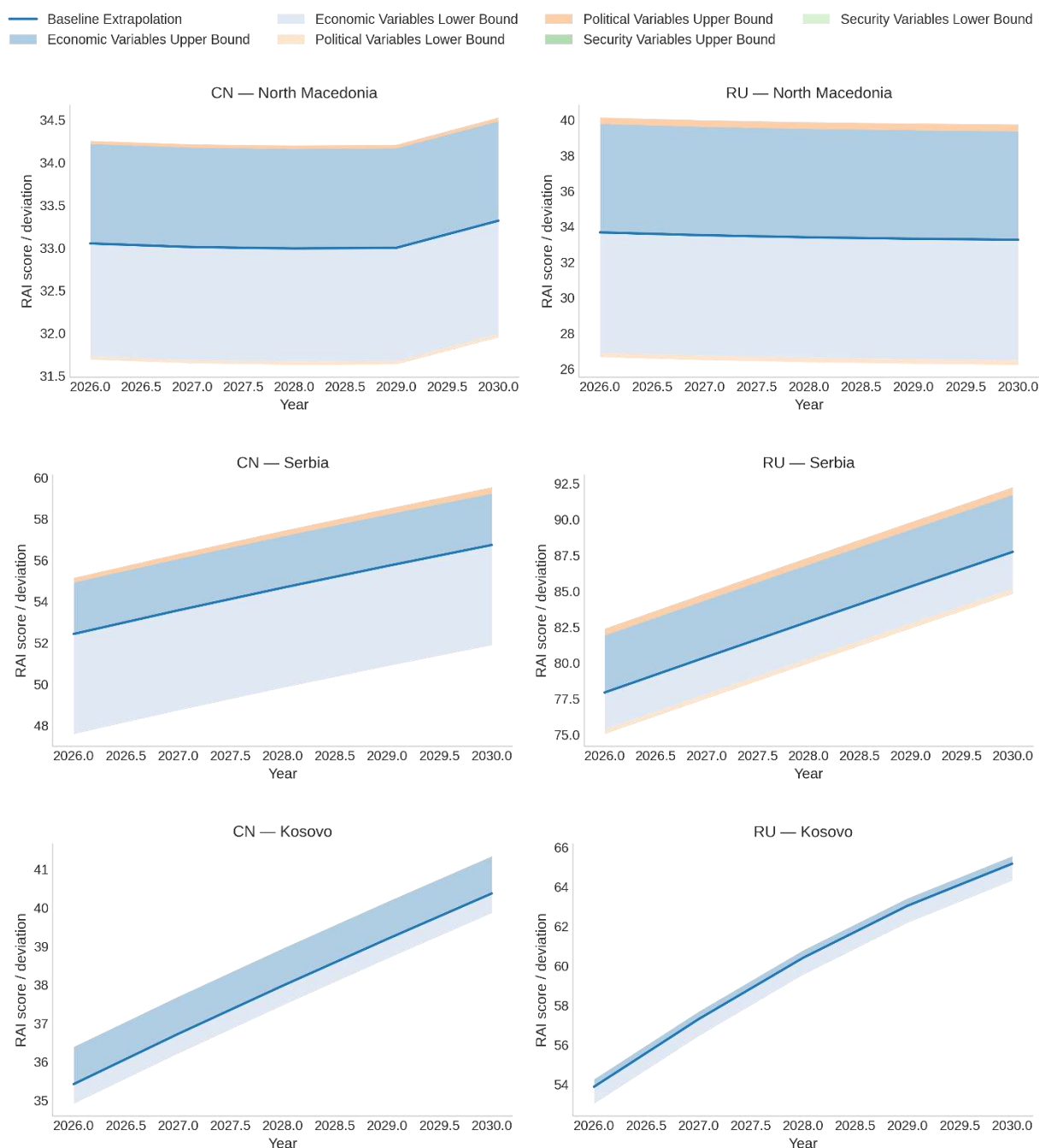
**Figure 4: Simulated Forecasts for North Macedonia, Serbia, and Kosovo**


Figure 5 indicates that shifts in political/cultural FMI contribute more strongly to overall FMI dynamics in Moldova and Albania than in the other country pairs. It is particularly noteworthy that an increase of political/cultural influence for Russia's FMI in Moldova have a larger impact than changes in the economic domain. Apart from that, while economic factors remain the largest influence in the other country-pairs, political/cultural variables still play a comparatively larger role. Overall, the graphs show an increasing trend of Chinese FMI in Moldova and Albania as well as Russian FMI in Albania. Contrarily, based on the simulated forecasts, total levels of Russian FMI decrease in Moldova until 2030.

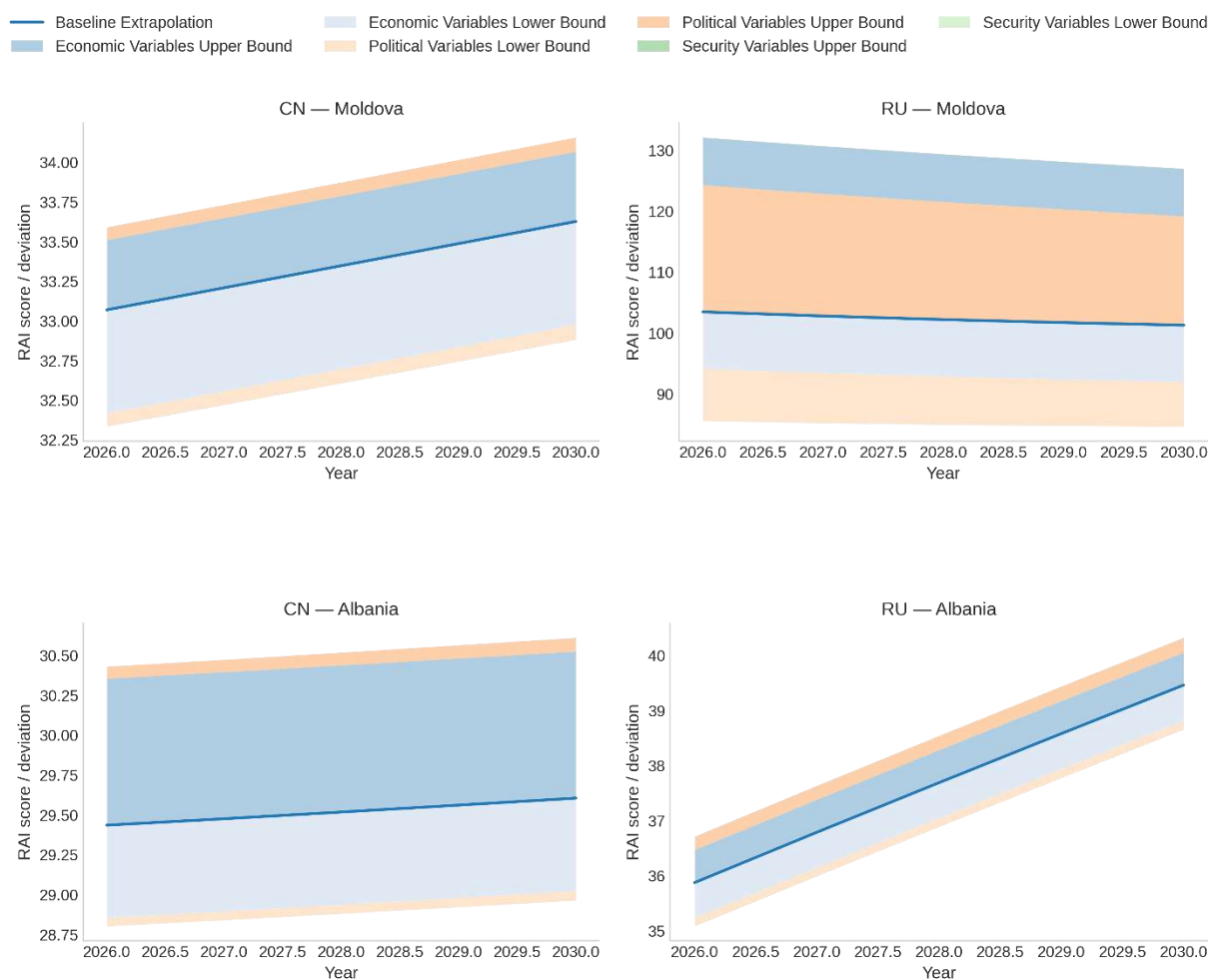
**Figure 5: Simulated Forecasts for Moldova and Albania**


Figure 6 shows that Georgia and Ukraine’s simulated futures are subject to somewhat different FMI dynamics. Ukraine is an outlier, as the security variables have the single largest effect on overall Russian FMI levels until 2030 based on the simulated forecasts. Similarly, Russia’s influence in Georgia is also predicted to be most strongly affected by the security domain, although economic and political/cultural factors also have a minor impact. China’s simulated influence in Georgia and Ukraine up to 2030 is similar to its influence in North Macedonia, Serbia and Kosovo. Changes in economic factors have the largest potential impact on total FMI levels, while political/cultural variations at the upper or lower bound of prediction intervals only factor in slightly. The only difference is visible for China’s FMI in Georgia, where a substantial increase in influence in the security domain compared to the baseline would noticeably increase overall FMI levels. At the same time, a substantial decrease in the security domain compared to the baseline would not substantially decrease total FMI levels.

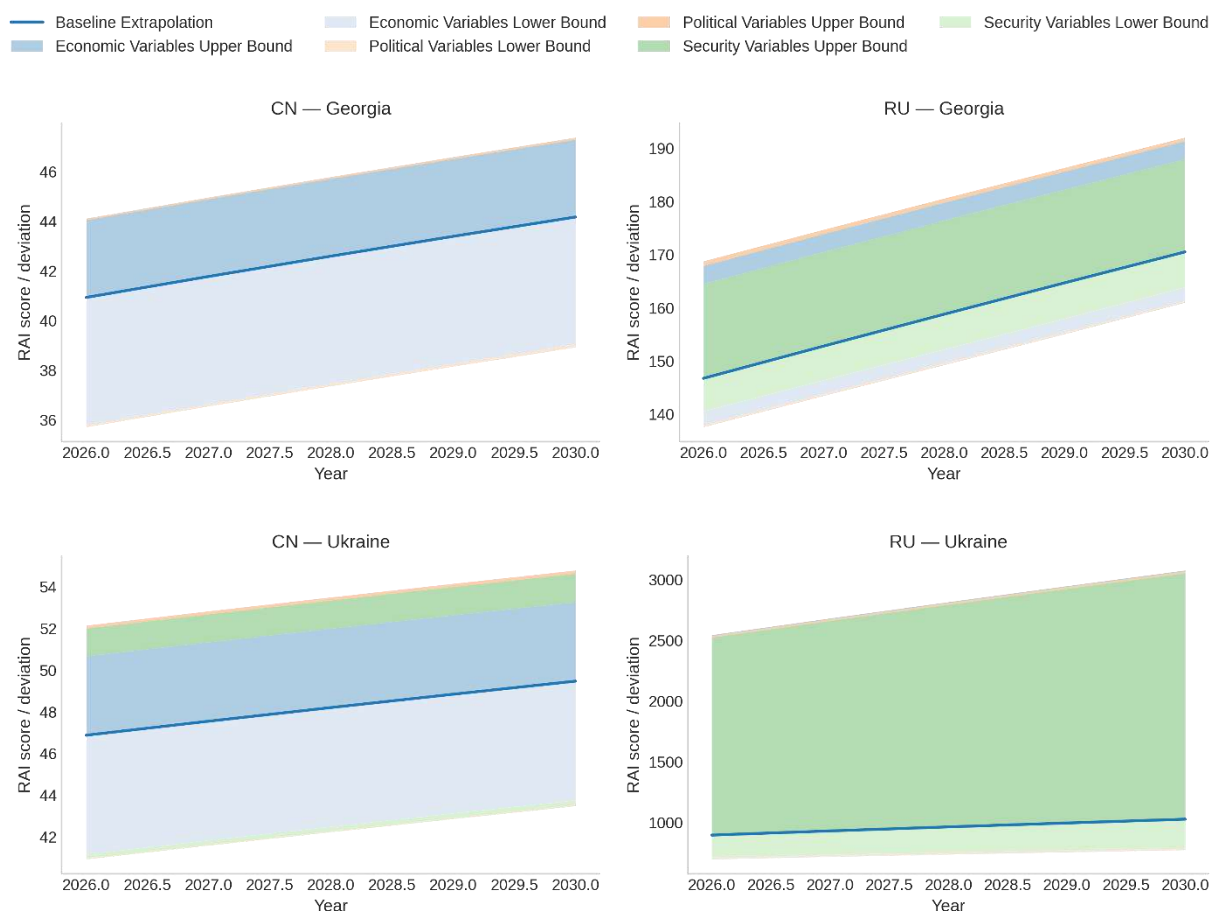
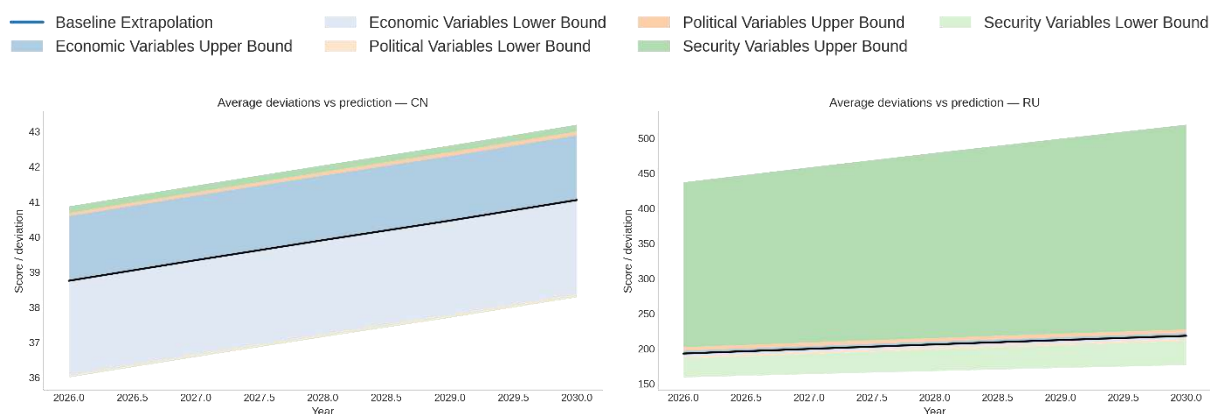
**Figure 6: Simulated Forecasts for Ukraine and Georgia**


Figure 7 shows distinct simulated patterns for Chinese and Russian FMI across the (potential) CCs. China's total forecasted FMI is most sensitive to economic changes, which generate the largest projected shifts overall. Security and political/cultural FMI also contribute to total levels of predicted Chinese FMI, yet at a smaller scale. Noticeably, increases in the security and political/cultural domain have more potential to increase than decrease overall FMI levels. For Russia, the country-level plots above indicate that FMI is also driven by economic and political/cultural domains. However, Figure 7 shows that changes in security FMI are projected to have the largest absolute impact on Russia's total FMI. This is largely driven by the magnitude of potential increases and decreases in Russia's security influence in Ukraine, which lets the effects of political/cultural and economic influence appear minor in the cross-country view.



**Figure 7: Average influence by external state actors across (potential) Candidate Countries**



### 3.5. Discussion of Forecasts

This section sets out to answer the research question ‘Which threats to the security, socio-economic and democratic systems of the EN3 and WB6 (potential) Candidate Countries may result from the malign geopolitical influence of Russia, China and other external state actors until 2035?’ through a data driven approach that extrapolates and forecasts indicators into the future. To this end, we first assess the predictive performance of indicators from the security, political/cultural and economic domain to forecast the level of Chinese and Russian FMI in the investigated (potential) CCs. Second, we develop simulated forecasts that display the relative impacts of increasing or decreasing FMI in the economic, political/cultural and security domains on total FMI levels. However, we limit the quantitative analysis to the period until 2030 to account for the limitations of a data-driven approach to assess the calculable risks and to therewith increase the applicability of the findings. As the uncertainty grows with time, the above foresight approach extends to 2035 to investigate the fundamental uncertainties ten years into the future.

Overall, the simulated forecasts until 2030 show that Russian and Chinese FMI is likely to continue affecting these states in multifaceted ways until 2030, with distinct country- and actor-specific patterns. Table 12 presents an overview about the REUNIR domains with the greatest impact on the total simulated FMI level for each external state actor and (potential) CC. For most investigated country pairs, economic factors are the primary influencing mechanism that can shift the total FMI levels up or down until 2030 (Table 12). This applies for all CCs in relation to China. For Russia, economic FMI is the primary driver in Serbia, Kosovo, North Macedonia, and Albania (all investigated WB CCs), based on the simulations. This means that for those CCs, the calculable risk of Russian and Chinese FMI until 2030 is mostly driven through economic factors, such as shifts in trade volumes, financial inflows, or economic sanction regimes. In other words, this suggest that the expected levels of FMI could most effectively be decreased in the four investigated WB countries by strengthening economic resilience against China and Russia. However, given that this insight is based on predictive modelling coupled with simulated extrapolations, further research is needed to robustly substantiate this claim.

Contrarily, for Russian FMI in Georgia and - unsurprisingly - Ukraine, influence in the security domain is the primary driver for total FMI levels until 2030 based on the simulation (see Table 12). With a similar caveat as above, this suggests that the best way to reduce the simulated level of FMI could be to increase resilience relating to security and military factors. Notably, through its large effect on Ukraine and Georgia, Russian

security FMI shows the largest overall effect size in the cross-country comparison — exceeding economic and political/cultural factors (Figure 7). This indicates that Russian security FMI has the greatest potential to drive simulated overall FMI levels up - or downward. Lastly, the simulated forecasts posit that Russian FMI in the political/cultural dimension in Moldova will be the primary driver that can change FMI levels in this country until 2030. This suggests that bolstering resilience in the areas of cultural influence like foreign cultural institutions, bidirectional migration levels and other forms of political interference could be the most important avenue to reduce overall Russian FMI compared to simulated levels in Moldova or prevent an increase thereof.

While being a primary driver in the Russia-Moldova simulated forecasts, political/cultural factors play a secondary role for Chinese FMI in Albania and Moldova as well as for Russian FMI in Albania (Table 12). So, for these country pairs political/cultural FMI contributes to the overall simulated FMI levels until 2030, yet the effects are smaller and less important than the economic ones. Moreover, for some country pairs, the impact of political/cultural factors is visible but has limited effects in comparison to other drivers. This is the case between both external state actors and Georgia, Ukraine, North Macedonia and Serbia. Lastly, China's simulated FMI developments towards Ukraine are noteworthy, as the secondary drivers of an increase are security factors, after economic factors. This highlights that an increase in Chinese security related dependencies or influence attempts in Ukraine could substantially increase overall Chinese FMI levels in Ukraine, after economic considerations. Notably, however, the effect on a decrease is considerably smaller.

**Table 12:** Level of domain importance for the total FMI levels per external state actor

|        | Security                                         | Economic                                                                                                                       | Political/Cultural                                                                                                                                          |
|--------|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Russia | <u>Primary</u> importance in Georgia and Ukraine | <u>Primary</u> importance in Serbia, Kosovo, Albania and North Macedonia<br><u>Secondary</u> importance in Georgia and Moldova | <u>Primary</u> importance in Moldova<br><u>Secondary</u> importance in Albania<br><u>Limited</u> importance in Georgia, Ukraine, North Macedonia and Serbia |
| China  | <u>Secondary</u> importance in Ukraine           | <u>Primary</u> importance in all CCs                                                                                           | <u>Secondary</u> importance in Albania and Moldova<br><u>Limited</u> importance in Georgia, Ukraine, Serbia, and North Macedonia                            |

These findings have several implications for this Paper's research questions as well as for furthering understanding of FMI in the EU's (potential) CCs. To begin with, the findings of the simulated forecasts stress that emerging calculable risks from FMI up to 2030 need to be investigated and addressed separately for each country and external actor pair. For example, based on the simulations, a policy response to increase political/cultural resilience against FMI would likely have a more substantial effect in Moldova than in Serbia. Similarly, future influence from Russia in Georgia will more effectively be curbed through support for security resilience, while Chinese influence is mostly felt through economic factors in Georgia. Thus, (potential) CCs benefit from tailored policies that reflect the varying risks from Russia and China in their respective circumstances.

Nevertheless, a few broader patterns of FMI are recognisable in the simulated forecasts up to 2030. First, the primary drivers that can impact Chinese FMI in all CCs until 2030 are economic factors. Second, Russia's FMI

is simulated to follow different patterns in the WB and EN. While economic factors are primary drivers for FMI in the former country group, this does not apply to the EN3. Instead, security factors are the main drivers in Ukraine and Georgia, and political/cultural factors in Moldova, up to 2030. Third, Moldova and Albania stand out, as political/cultural factors play a primary or secondary role for the FMI levels of both external state actors. Lastly, for Russian FMI, the results indicate that security-related threats to the CCs have a larger absolute effect on total FMI levels than the other two domains. Accordingly, reducing - or preventing - security influence attempts is likely to yield the greatest reduction in overall FMI.

Apart from the simulated forecasts, the model performance of the elastic net prediction model provides interesting insights about the ability to forecast and measure FMI. While the inability of the main annual and monthly model to outperform the baseline suggests a suboptimal model fit, the overall fit is still acceptable in comparison to similar models. For instance, Springman et al. (2023, pp.22) who build a forecast that predicts the level of FMI one to seven months into the future - based on lagged RAI score, local economic conditions, as well as information about domestic political events - consider their models as ‘high performing’ if the R squared score is higher than 0,6. Compared to this benchmark, both the annual and monthly forecast can be considered as high performing, as their R squared score lie above 0,6 ( $R^2 = 0,8$  and  $R^2 = 0,71$  respectively)<sup>19</sup>.

Furthermore, the smaller predictive power of the monthly model with both external state actors compared to the annual model suggests that increasing the sample size and adding new predictor variables that capture more timely granular trends does not automatically improve the prediction. This may be because many of our predictor variables are only available at an annual frequency and are complemented by relatively few monthly indicators, preventing the model from fully reflecting monthly variation. Nevertheless, when isolating the external state actors, the monthly model including only China made more accurate predictions than the no-change benchmark. This could suggest that more spatially and temporally granular models could capture FMI more accurately. This finding requires further testing, as this trend was not visible across all regional models. Relatedly, the findings posit that domain-specific models perform better than the model including all three domains. Together, these findings reiterate the above claim that understanding and predicting FMI could benefit from focusing on FMI’s subcomponents as well as country specific factors.

Lastly, it needs to be highlighted that the inability of forecasting models to consistently outperform no-change benchmarks is not entirely unique to predictions in the geopolitical domain. For instance, when forecasting highly volatile data on stock markets and exchange rates, Beck et al., (2025) show that none of the tested methods – out of which some are more complex than elastic nets – manage to consistently outperform no change benchmarks. Green et al., (2009) find a similar pattern for climate change forecasting. In the realm of conflict forecasting, which shares some overlaps with this Paper’s methodology, there are similar instances where not all forwarded models beat a no change model (Hegre et al., 2017), or where the proposed model only beats a no-change baseline in some but not all prediction tasks (Mueller et al., 2024).

Moreover, research suggests that such limitations in forecasting are not restricted to machine generated forecasts. For instance, a study involving over 2 000 US national security officials concludes that the overconfidence of many participants negatively impacts their predictive accuracy (Friedman, 2025). As such,

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<sup>19</sup> Due to the different time horizons and geographical focus of this paper’s and Springman et al.’s (2023) forecast, the results are not fully comparable but serve the purpose to illustrate the evaluation of forecast performance of models in similar domains.

the study finds that 68 % of participants ‘would have performed better if they simply said they did not know the answer to every question that the survey gave them’ (Friedman, 2025, p. 42). Furthermore, the authors find that ‘[s]ixteen percent of participants would have received better scores, in expectation, if they had guessed probabilities at random’ (Friedman, 2025, p. 42). While these examples are not directly comparable to the forecasting model of this paper, they illustrate the persisting difficulties across domains and methods – including human forecasting - to create accurate and useful predictions about future phenomena.

Despite the challenges of applying a data-driven forecasting approach to accurately predict FMI, this research provides novel and useful insights for academics and policy makers. Regarding the former, this Paper extends existing forecasts of FMI by building on limited data to produce short- and mid-term projections. It also shifts analytical attention to a geographic area of growing importance for European security and deepens understanding of how external state actors may undermine democratic, economic, and security structures in the region.

As a practical implication, our analysis highlights the complex nature of FMI and the need to further understand its dynamics through better measurements and data, as the predictive model did not consistently outperform the no-change benchmark. Furthermore, the results of the predictive models as well as the simulated forecasts stress the need to investigate FMI comprehensively within the political, security and economic domains. For instance, the feature importance of the predictive models signals that variables from all sectors are important to create the prediction, while the simulated forecasts highlight that changes in different factors have varying influence across the (potential) CCs. Thus, the results suggest that to increase resilience in these countries against FMI, different measures are needed for each country and each external actor.

All in all, several limitations accompany the results of this study. First and most prominently, the limited availability of data resulting in a small sample size decreases the utility of machine learning models. While machine learning models typically benefit from large training data as this increases the chances to learn generalisable patterns, small datasets make predictions more prone to influence from outliers and noise in the data (Karapiperis et al., 2024). This issue is amplified by the fact that many indicators about FMI hold missing values that have to be interpolated, which further introduces potential errors in the predictions. Another limitation due to the limited available data is that not all countries relevant to the REUNIR project could be included in the analysis. Second, the simulated forecasts rely on the linear extrapolation of historical patterns multiple years into the future. As a rule of thumb, the further the extrapolation lies in the future, the more uncertainty surrounds the extrapolation and the resulting simulated forecasts. Additionally, such extrapolations assume a mere continuation of recent trends, which does not account for potential major disruptions. For example, with the values being extrapolated until 2030, a possible EU accession of certain CCs until then is not considered in the simulations.

More fundamentally, it is possible that an underlying problem of forecasting a complex geopolitical phenomenon such as FMI lies in its very definition. In the REUNIR project, FMI threats are defined as a function of capabilities and intent to exploit vulnerabilities. While certain indicators can depict structural vulnerabilities and influence capabilities through measurements of interdependence, (future) intent is a concept inherently difficult to measure (Kuznar et al., 2011). This Paper operationalises intent as past materialised actions of influencing efforts and assumes that historical path dependency where there has been prior FMI can be indicative of future FMI. However, as priorities and motivations change over time, such relationships in the next five to ten years cannot currently be accurately modelled. One possible avenue to

increase our understanding of the role of intentions in geopolitical and foreign malign influence could be agent-based modelling, as discussed in the literature review. However, while this would enhance the understanding of influencing dynamics, this would not *per se* offer concrete forecasts of potential FMI.

Future research should try to address the shortcomings of this Paper by investigating the past relationship between the selected indicators and foreign malign influence more closely, and by investing resources into creating more accurate, regionally diversified and long-term measurements of FMI itself. For example, due to lack of data availability, Montenegro and Bosnia and Herzegovina could not be included in the analysis. Additionally, expanding the research to test other machine learning methods such as boosted trees (if data size allows) or support vector machines could further help to identify suitable methodologies for predicting FMI. Furthermore, research could apply more dynamic simulation strategies, for example as developed in Hegre et al. (2017), or use Bayesian modelling to better account for the trade-off between assumptions and data that long-term forecasts face. Moreover, using the identified indicators of interdependence and measurements of influence attempts to predict domestic consequences of FMI, such as democratic backsliding or increases in disinformation, appear to be another fruitful avenue of future research.

## 4. CONCLUSION

In this Working Paper, we developed and applied a foresight and forecasting approach to identify threats to the military, socio-economic and democratic systems of (potential) CCs for EU membership in the WB6 and the EN3 that could plausibly result from the geopolitical ambitions of China, Russia, Turkey, the United States and the Arab countries of the Gulf (external state actors), up to 2035. Following REUNIR's conceptual and methodological framework, we took a dual approach.

First, we investigated fundamental uncertainties and underrated ways in which FMI may play out in the future, by applying a structured, expert-based scenario building and analysis method (chapter 2). Second, we forecasted future Chinese and Russian FMI levels based on available data on Resurgent Authoritarian Influence (Springman et al., 2022), as well as data on interference and interdependence between the external state actors and the CCs (GEO-POWER EU, 2025a). This was done to show how future risk can be approximated numerically with a data-driven simulation approach (chapter 3). Both approaches integrate the security, socio-economic and democratic domains, in the form of expertise and data respectively, and extend REUNIR's prior threat assessments into the future, with a focus on FMI and external state actors. The detailed results of the scenario analysis on uncertainty-based threats and the data-based forecasting of risk-based threats are discussed in the respective sub-sections (2.5.3 and 3.5). This synthesis focuses on the cross-cutting lessons and implications for further research in REUNIR and beyond.

### ***Scenario-based exploration of uncertain FMI mechanisms***

Compared to the existing literature of scenarios about FMI in the EN3 and WB6, our scenario chapter presents a novel analysis of potential future FMI across the security, socio-economic and democratic domains from a set of relevant geopolitical state actors. The methodology extends existing threat-scanning and qualification methodologies into a theory-driven, structured process to investigate FMI as broad concept, going beyond the conventional narrow focus of FMI on the information domain and seeking to counter analytical biases (see Bressan et al., 2024). This allows a systematic exploration of external state actors' potential future role. Intermediary results include Delphi survey-based expert assessments on underrated FMI mechanisms from external state actors in the CCs, as well as critical uncertainties, trends and weak signals determining the future of FMI in CCs up to 2035. The resulting scenarios and analyses outline plausible consequences of FMI by external state actors, and its interplay with EU policies and (non-)enlargement.

The scenario analysis (see Table 5, section 2.5.3) highlights that Russia is expected to remain the key threat to CC resilience in the coming 10 years, even more so for the EN3 than the WB6, especially in the security and political domains. Among many FMI attempts, regime collapse in Russia and a nuclear attack by Russia are the most consequential developments in our scenarios, which show that despite the trend, developments do not necessarily unfold in a linear fashion. In the former case, it provides opportunities for CCs to increase their resilience in the absence of a Russian threat. US- influence is assessed as one of the most critical uncertainties for the future of the EN3 in the security and political domains, together with NATO's role, but direct FMI by the US and a role independent from NATO remains absent and underexplored in EN3 scenarios – indicating that the US is seen as primarily relevant through its role in NATO. In the WB6, the US is seen as relevant in the near-term future, but its relevance is expected to decline over the years until 2035. In the near-term, the US might undermine democratic resilience by legitimising anti-democratic practices in CCs and could potentially weaken resilience by suddenly withdrawing from Europe unilaterally or meddling in internal disputes between CCs.



China and the Gulf countries are expected to mainly exploit economic opportunities in the absence of EU investments in the CCs, creating dependencies and adverse incentives that undermine resilience in the long-term. Their political competition to the EU remains limited. China has the possibility of leveraging cooperation formats such as BRICS+ to compete with the EU for influence. Chinese FMI is assessed as relevant in the security domain, particularly regarding any support for Russia's war, hybrid warfare and destabilising FMI efforts. The scenarios indicate that Turkey could plausibly step up as a security provider in the WB6, involving itself more to eventually support CC resilience, aligning political, socio-economic and security influence to contribute to stability in the WB6. For the EN3, experts considered a minor Turkish role in intensified arms sales to Ukraine and the creation of economic dependencies in Georgia and Moldova as potential underrated ways of future FMI. While the EU emerges as the most relevant foreign actor for the fate of the WB6 and on a par with Russia's role for the fate of the EN3 up to 2035, EU enlargement is by no means a guarantor for democratic resilience. In one scenario, enlargement turns from a transformative project to a mere geopolitical power project by an increasingly authoritarian EU.

The results need to be interpreted in the context of the project, its methodology and the limitations. Notably, individual scenarios were not designed to be predictive. The aggregate expert-based assessments of key influential factors for the future of the EN3 and WB6, as well as the analysis of overall FMI dynamics, are still relevant sources of expert assessments of the role that external state actors can play in undermining CC resilience up to 2035. The scenario's focus on threats by external state actors are a consequence of the project research question and by no means intended to say that these external states cannot turn into constructive forces for resilience in alternative futures. Further research should include more in-depth expertise on the external state actors, their motivations and interests, to deepen insights into their potential influence on CCs. Future research – or continued work with the scenarios we produced – could also further explore the possibility for cooperation between different external state actors and the consequences of other global shifts that could impact their interplay, as well as the role of individual EU Member States. In general, the scenarios can be used as a basis to further explore consequences of the described dynamics for individual geographic, topical areas or actor constellations.

### ***Simulated forecast-based exploration of calculable FMI levels***

The forecasting chapter demonstrates the potential and limitations of applying data-driven forecasting methods to assess FMI in the EU's (potential) CCs. This approach complements existing scholarship, as we combine multiple established data sources to produce timely, geographically specific simulated forecasts of FMI across security, socio-economic, and democratic dimensions in the WB6 and EN3 until 2030. Building on Springman et al. (2023), we develop an annual forecasting model that adds indicators of interdependence between ESAs and CCs (e.g. GEO-POWER-EU, 2025a) and materialised influence attempts to Springman et al.'s (2023) Resurgent Authoritarian Influence data, and we benchmark its predictive performance against a no-change model. Finally, we extend this approach through simulations of long-term developments up to 2030, providing a purely quantitative contribution that extends related REUNIR Working Papers.

By integrating indicators from the security, economic, and political/cultural domains, this analysis indicates that FMI from Russia and China is likely to continue affecting the EN3 and WB6 (potential) candidate countries in multifaceted ways through 2030, with clear country- and actor-specific patterns. The simulated forecasts show that economic factors are the dominant driver of Chinese FMI across all investigated (potential) CCs, and also the primary lever shaping Russian FMI in the investigated Western Balkans states (Serbia, Kosovo, North Macedonia, and Albania). This implies that, for these countries, the most effective avenue to lower mid-term FMI risks might be to strengthen economic resilience - e.g., by reducing trade and financial



dependencies, and improving insulation against coercive economic tools. In contrast, Russian FMI follows a different logic in the EN3: security-domain influence is the main driver in Ukraine and Georgia and has the largest effect size in cross-country comparison, suggesting that resilience in security and military systems is the most consequential safeguard there. Moldova stands apart, as political/cultural influence is simulated to be the primary driver of Russian FMI, pointing to priorities such as protecting information space, limiting malign cultural and institutional penetration, and strengthening democratic safeguards.

Academically, the study contributes to the emerging field of geopolitical threats by combining limited public data with predictive modelling and simulated forecasts, while explicitly acknowledging rising uncertainty over time. Practically, the findings underscore that policies to counter FMI must be tailored to each country–actor pair, focusing on the domain that most effectively shifts total FMI in that context, and that improved data collection is essential for stronger early-warning and resilience planning. Nevertheless, the simulated forecasts’ limitations - primarily the restricted data availability, small sample size, and uncertainty inherent in long-term extrapolations - suggest caution in interpreting the forecasts as deterministic predictions. Instead, the results offer quantitative indications of possible trajectories and leverage points that can inform academic analysis and policy planning through 2030 but require further validation. Future research should deepen the exploration of causal mechanisms behind FMI in the available data, expand the datasets to include additional countries and more historic data, and test alternative modelling approaches such as boosted trees, Bayesian methods, or agent-based simulations. Ultimately, this research underscores that while forecasting foreign malign influence remains an inherently uncertain task, systematic data-driven approaches can meaningfully advance understanding of its dynamics and help policymakers design more resilient strategies to mitigate its impact.

### ***From FMI to resilience***

Overall, our analysis in this paper shows how risk and uncertainty about future geopolitical developments and threats can be explored with thorough scenario-based foresight and forecasting in a complementary way, leveraging the advantages of each individual approach. The data-based simulation approach to forecasting future levels of FMI shows what we can say about future FMI levels based on the limited currently available data on a select number of CCs and external state actors (Russia and China). In contrast, the scenario analysis highlights both trends and discontinuities in a non-linear fashion (e.g. Russian regime collapse) based on expert assessments of future uncertainties.

Taken together with REUNIR’s prior threat and resilience assessments, the results of this two-tiered forward-looking analysis will form the basis for developing strategic policy options for the remainder of the project, identifying how the EU can strengthen its foreign and neighbourhood policy toolboxes to support CCs’ resilience and counter external state threats. The summarised results in Table 5 (section 2.5.3) and Table 12 (section 3.5) provide guidance for these next steps. Building on this, we will assess if and how the EU already exerts power and influence in the scenarios and use shortfall analyses against the scenarios and forecasts to pinpoint major gaps in resilience and current policy instruments, as well as opportunities and strategic entry points for proactive engagement. The focus will be on making policy options more robust under uncertainty and prioritising them according to the most relevant gaps, threats and opportunities. This process will draw on the REUNIR consortium’s expertise in a strategic foresight workshop using pre-mortem analysis and design thinking (see Bressan et al., 2024, p. 11; Baykal et al., 2021) to improve policy options and enable the EU to support CC resilience and accession trajectory in a robust manner – preventively and strategically across multiple plausible futures.

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## ANNEX A – AGGREGATED FUTURE FOREIGN INFLUENCE MECHANISMS (SURVEY-BASED)

| Western Balkans (WB6)                                                                                                                                         |                                        |        |        |            |                 |         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|--------|--------|------------|-----------------|---------|
| FMI Mechanism / Event                                                                                                                                         | Applicable Countries (marked in black) |        |        |            |                 |         |
|                                                                                                                                                               | Serbia                                 | Kosovo | Bosnia | Montenegro | North Macedonia | Albania |
| The U.S. government supports ethnonationalist leaders and pushes for border changes in Kosovo, Bosnia and Serbia                                              | Serbia                                 | Kosovo |        |            |                 | Albania |
| Turkey sells military equipment to Serbia                                                                                                                     | Serbia                                 |        |        |            |                 |         |
| Turkey funds infrastructure projects in some Western Balkans countries                                                                                        |                                        |        |        |            |                 |         |
| The United Arab Emirates heavily invest in infrastructure projects in the Western Balkans region, creating dependencies                                       |                                        |        |        |            |                 |         |
| Gulf countries support radical Islam in Bosnia with investments, including social support (education, exchange programs, building cultural and business ties) |                                        |        | Bosnia |            | North Macedonia | Albania |
| China doubles down on economic incentives and building ties with Serbia and Montenegro                                                                        | Serbia                                 |        |        | Montenegro |                 |         |
| Western Balkans countries give China access to critical minerals through partnership agreements                                                               |                                        |        |        |            |                 |         |
| China: big push investing in infrastructure across the entire Western Balkans                                                                                 |                                        |        |        |            |                 |         |
| China publishes proposal for BRICS+ with membership option for BiH, Montenegro and Serbia (possibly together with Russia)                                     | Serbia                                 |        | Bosnia | Montenegro |                 |         |
| China: big push to invest in energy infrastructure (gas, electricity), including favourable loans to Western Balkans countries                                |                                        |        |        |            |                 |         |
| China: big push selling military technology and equipment to Serbia                                                                                           | Serbia                                 |        |        |            |                 |         |
| Russia and China offer support to fight public and student protests in Serbia                                                                                 | Serbia                                 |        |        |            |                 |         |

|                                                                                                                                                                                                                    |        |        |            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|------------|
| Russia: big push with funds and weapons to support Republika Srpska and Serbian nationalists in Bosnia                                                                                                             | Serbia | Kosovo | Albania    |
| Russia and China support an armed incursion of Serbia into Northern Kosovo with arm, narratives and diplomatic cover                                                                                               | Serbia |        | Bosnia     |
| Pro-Russian government in Georgia consolidates its power, Russia attempts to export the model to Serbia and Bosnia                                                                                                 | Serbia |        | Bosnia     |
| Russia weaponizes financial and energy dependency, blackmails Serbia, threatens to freeze financial and energy flows                                                                                               | Serbia |        |            |
| Russia pushes electoral interference in the Western Balkans to install authoritarian leaders                                                                                                                       |        |        |            |
| Russia interferes in Montenegro - similarly to the 2016 'coup' about NATO accession through overt disruption                                                                                                       |        |        | Montenegro |
| Russia doubles down to break the international consensus on Kosovo's independence through overt disruption                                                                                                         |        | Kosovo |            |
| [UNCLEAR ORIGIN:] Authoritarian state actors: big push to fund and support secessionist movements within the EU and in the Western Balkans simultaneously under disguise of an ethnic self-determination narrative |        |        |            |
| [UNCLEAR ORIGIN:] Big push of disinformation campaigns to re-educate the youth via TikTok and other channels with revisionist narratives                                                                           |        |        |            |
| [UNCLEAR ORIGIN:] Big push of disinformation and AI-deepfake campaigns about inequality and violence against minorities to mobilize ethnic divisions across the Western Balkans                                    |        |        |            |

| Eastern Neighbourhood (EN3)                                                                                                                                                                                                                                      |                                        |         |         |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|---------|---------|
| FMI Mechanism / Event                                                                                                                                                                                                                                            | Applicable countries (marked in black) |         |         |
|                                                                                                                                                                                                                                                                  | Georgia                                | Ukraine | Moldova |
| Russia and US cooperate, drawing Moldova/Georgia away from the EU-supported security axis                                                                                                                                                                        | Georgia                                |         | Moldova |
| Russia and the US cooperate on tariffs as a means of hybrid warfare/economic coercion following anti-Russia backlash in Moldova/Georgia                                                                                                                          | Georgia                                |         | Moldova |
| Turkey sells military equipment to Ukraine                                                                                                                                                                                                                       |                                        |         |         |
| Turkey massively expands investments in economy& infrastructure in Moldova/Georgia, becomes a key partner for economic growth while creating economic dependencies                                                                                               |                                        |         |         |
| Turkey establishes unsustainable economic dependencies                                                                                                                                                                                                           |                                        |         |         |
| UAE massively expands investments in economy& infrastructure in Moldova/Georgia, becomes key partner for economic growth while creating economic dependencies.                                                                                                   |                                        |         |         |
| China steps up its support to the Russian defence industrial base, supplies more (and more advanced) weapons systems to Russia.                                                                                                                                  |                                        |         |         |
| China starts to become an economic growth guarantor (challenging the EU) in the region through its financing of infrastructure projects                                                                                                                          |                                        |         |         |
| China starts licensing and supplying advanced spyware to the Georgian government to crack down on pro-democratic protest movements.                                                                                                                              |                                        |         |         |
| Increased cooperation between autocratic regimes to fight democratic protests                                                                                                                                                                                    |                                        |         |         |
| Russia increases its ties of dependency in Georgia and Moldova                                                                                                                                                                                                   |                                        |         |         |
| Russia increases its digital mal/disinformation campaigns in 2028 for the Moldovan presidential/Georgian parliamentary elections.                                                                                                                                |                                        |         |         |
| Russia's direct military threat of invasion                                                                                                                                                                                                                      |                                        |         |         |
| After years of neglect, Russia regains an interest in Transnistria and finds a way to funnel money into the Transnistria via crypto currencies. Russia offers Transnistrians money in exchange for them sabotaging business cooperation with Moldova and the EU. |                                        |         |         |
| Russia engages in energy blackmail: (threatens to) turn off gas supply to regions heavily reliant on it, causing political and humanitarian turmoil.                                                                                                             |                                        |         |         |

|                                                                                                                                                                                                                |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Russia manages to covertly amass Russian infantry in South Ossetia that is used for a new military offensive aimed at capturing Gori.                                                                          |  |
| External state actors massively support actors who undermine judicial independence and anti-corruption efforts in Moldova (potentially also Ukraine).                                                          |  |
| Massive propaganda and disinformation campaigns of unclear origins fuelling anti-EU sentiments flood traditional and social media                                                                              |  |
| Unidentified external actors invest in a resurgence of Soviet-era nostalgia through media and pop culture                                                                                                      |  |
| On a trip close to the border of Transnistria, the Moldovan President is kidnapped by armed, but unidentified men. Russian authorities deny any involvement.                                                   |  |
| Russian intelligence start large-scale misinformation campaign on TikTok to spread rumours about a new type of HIV contagious virus in the Ukrainian LGBTQ+ community                                          |  |
| Independent media unveils large-scale infiltration of Moldovan and/or Georgian intelligence services by pro-Russian assets                                                                                     |  |
| The imposition of economic embargos severely fractures exports                                                                                                                                                 |  |
| Russia prohibits remittances being send from Russia to Georgia, thus depriving Georgian households from over USD 25 million a month                                                                            |  |
| The Georgian government comes to a new agreement with Russia, surrendering some of its territories to Russian control. This causes outrage in the EU and puts Georgia's accession status in a precarious state |  |
| Instrumentalising minorities to destabilise                                                                                                                                                                    |  |

## ANNEX B – WESTERN BALKANS SCENARIOS

### WB6 Scenario 1: “Nationalist EU+ without NATO”

**Summary:** By 2035, the EU has enlarged, admitting nine new members including the Western Balkans and post-war Western Ukraine. NATO has dissolved. EU accession happened with relaxed requirements on democracy, rule of law and economic reforms. As a result, the EU includes a mix of democratic, hybrid, and authoritarian regimes. Countries are marked by low democratic resilience against foreign authoritarian interference.

The United States has fully withdrawn its troops from Europe and pushed for border changes in the Western Balkans. Serbia, Bosnia, and Montenegro as EU members have slid into instability with emergency laws, coups, and secessionist movements supported by external state actors, particularly Russia.

Recession plagues European economies. Populist and nationalist leaders dominate EU institutions. Under pressure from Russia and U.S.-American isolationism, EU enlargement is not a transformative project anymore but has become a pragmatic option to stabilise the Western Balkans and strengthen the EU's geopolitical standing. Symbolic projects like the Athens–Belgrade–Berlin high-speed rail sought to signal cohesion, but mass protests and reemerging ethno-nationalism have exposed the Union's limits. Europe in 2035 is weaker: larger but less coherent, deeply divided, and isolated from its former partners across the Atlantic.

#### **Timeline:**

**2026-2027:** In 2026, Marine Le Pen wins her appeal in the court case on the embezzlement of EU funds. The United States proposed border changes in the Western Balkans that would remove Kosovo from the EU enlargement process and tie it to Washington as a protectorate, with annexation as the final aim. The Trump administration also presses for border changes inside NATO. In 2027, Serbia introduces emergency laws and postpones presidential elections, while the EU stays silent. Germany forms a new coalition government that consists of the far-right AfD and the Christian democratic CDU. Marine Le Pen is elected President of France. With national sovereigntists taking over the enlargement logic begins to shift. Conditionality weakens, and accession is reframed as a geopolitical tool to preserve influence.

**2028:** Economic recession hits Europe. Growth stalls, unemployment rises, and households experience a decline in living standards. Governments struggle to respond, being caught between austerity pressures and mounting public anger. The downturn erodes the EU's capacity to inspire reforms in CCs. With prosperity as the main incentive for accession gone, the EU's traditional leverage weakens. By the end of 2028, accession is still on the agenda but now framed less as integration into a prosperous club, and more as a geopolitical Union. This change comes amid an increasingly aggressive Russia on one side, and an isolationist US on the other side.

**2029-2030:** On NATO's 80th anniversary, the last US troops leave Europe, marking the de-facto end of the alliance, with its official dissolution following soon. With transatlantic security guarantees gone, Europe faces a historic vacuum. The same year, European Parliament elections deliver a sweeping victory of nationalist forces, with Viktor Orbán elected president of the Parliament. Between 2029 and 2030, J.D. Vance

wins the US presidency, cementing Washington's isolationist turn. Meanwhile, Montenegro has working towards a future in the EU.

2030: The developments culminate in unexpected tensions, when Montenegro undergoes a soft coup: Spajić and Abazović flee into exile, reinstating Milo Đukanović's regime. The coup is co-orchestrated by the US, in need of Đukanović's influential network in the region, as Montenegro's most influential post-independence politician. US isolationism and Balkan instability convince right-wing leaders in EU capitals to adopt a pragmatic approach to enlargement. Accession is no longer viewed as a transformational project but as a way to stabilise fragile neighbours and increase Europe's geopolitical weight. Illustrating this turn, Đukanović - a pro-EU politician restored to power through a questionable coup d'état – is welcomed back as leader of Montenegro into the European Union.

2031 – 2033: Political power in European capitals and Brussels further consolidates around nationalist leadership. Alice Weidel becomes German Chancellor, and Marine Le Pen secures re-election in France in 2032. Together, they steer the Union toward a pragmatic but illiberal agenda, prioritising sovereignty and borders over democratic standards. In the Western Balkans, North Macedonia passes a constitutional amendment recognising Bulgarians as a national minority, unlocking its path to accession. Serbia elects a former student leader as president, struggling to build a fragile balance between a pragmatist pro-EU approach and Serbia's looming history of nationalism. While such mixed developments would have previously complicated EU accession, they are now welcomed as evidence that accession can move forward regardless of democratic or governance quality.

2034: European Parliament elections bring modest gains for progressive parties but do not reverse nationalist dominance. That same year, the Council adopts the "green line regulation," allowing countries with unresolved territorial disputes to join, explicitly recalling Cyprus's accession. This is the decisive break with the traditional model of conditionality in the past. What once would have been an obstacle is now reframed as manageable after accession.

2035: In June, the Athens–Belgrade–Budapest–Berlin TGV line opens, marketed as proof of Europe's ability to integrate Southeast Europe. In December, the Treaty of Budapest is signed announcing the long-awaited end of the war in Ukraine. Nine candidate countries, including Western Ukraine and Kosovo, join the EU. Kosovo's inclusion reflects the unifying power of geopolitical confrontation with the US, as the five EU states who have not previously recognized Kosovo's independence are forced to change their position to block an impending US annexation of Kosovo. Le Pen and Weidel celebrate the treaty as a pragmatic Europe securing its periphery. Yet in Serbia, mass demonstrations erupt, fuelled by the Orthodox Church and orchestrated by Russia. Enlargement is achieved, but it does not bring stability. The Union is larger, but less cohesive.

**Summary of FMI:** Enlargement with relaxed democratic conditionality leaves ample space for external influence, as democratic protection and resilience are low. The US, after withdrawing troops from Europe, re-enters the Balkans disruptively by pushing border changes and backing controversial political comebacks, such as Đukanović's return in Montenegro. Russia exploits discontent, instrumentalizing the Orthodox Church and using disinformation to stir protests against political agreements, ensuring instability persists despite EU enlargement.

## WB6 Scenario 2: “Hybrid Boom”

**Summary:** By 2035, hybrid regimes in the Western Balkans – stuck midway between democracy and autocracy – experience strong economic growth. NATO’s cohesion and influence have declined. The US has pulled out its last troops from Europe, North Macedonia has left the Alliance, and Turkey now runs former KFOR bases in Kosovo. Russia is back on the scene with intensified cultural diplomacy. China has expanded its role, moving from infrastructure and energy to directly investing in small businesses. Chinese A.I.-powered wind farms in Albania help compensate for the decline in hydropower due to climate change.

Although EU enlargement is temporarily off the table, the EU maintains an economic presence by officially including the Western Balkans in its Global Gateway programme. Investors from Gulf countries have completed a luxury resort and highway project in Bosnia, solidifying their influence. Niche successes, such as Bosnia’s truffle exports to Chinese Michelin restaurants and Serbia’s booming crypto-casino sector, illustrate a thriving but fractured economy. The region is prospering by balancing multiple external supporters, even as democracy stagnates and inequality and hybrid regimes take hold.

### Timeline:

**2025–2027:** In the winter 2025/26, Russia launches a significant offensive in Ukraine, resulting in annexations of territory over the next two years. Governments in the Western Balkans stop supporting EU sanctions against Russia and are rewarded by Moscow with free trade agreement negotiations. Within the EU, enlargement efforts are diminished as DG NEAR merges with DG INTPA, indicating a shift from accession to external partnerships. France holds a consultative referendum on enlargement, with the majority voting against enlargement. Divisive right-wing media narratives about these results further rupture the relationship between the EU and the Western Balkans, further reducing the credibility of any enlargement prospects. Tensions rise in Serbia, with clashes between Orthodox zealots and LGBTQI+ Pride participants.

**2028–2029:** Russia strengthens its cultural influence. The ‘Pioneers for a True Europe’ summer camps appear, and the Moscow Patriarchate receives approval to build a new church in Montenegro. Meanwhile, China promotes a plan for a special economic zone in the Western Balkans, while investors from Gulf countries prepare luxury resort and infrastructure projects in Bosnia. Local economies diversify: Bosnian truffle exports reach Chinese luxury markets, and Serbia’s crypto-casino industry experiences significant growth.

**2030–2032:** The rift in transatlantic security widens. In 2029, newly elected US-President J.D. Vance revokes Trump’s previous mild stance on NATO. As such, the US officially leaves NATO in 2030. In response, the Kosovar government extends an official invitation to its ever-closer ally, Turkey, to take control of KFOR bases, as it fears NATO’s disintegration and its own security deteriorating. Meanwhile, Montenegro adopts anti-LGBTQI+ laws, showing increased conservatism. Albania’s leader hosts a Belt and Road forum with China, while investment from the United Arab Emirates flows into infrastructure and vacation resorts in Bosnia. Gulf states grow their religious presence in Albania, Bosnia, and North Macedonia through schools and exchange programmes.

**2032:** Serbia’s government adopts the Trump coin as its national currency, to flatter the US and signal Serbia’s willingness to cooperate with autocratic states. Serbia’s gestures do not go unnoticed among the EU’s adversaries: in the same year, Serbia is granted observer status in the Eurasian Economic Union. The region’s economic realignment is also demonstrated by China, which presents a BRICS+ proposal inviting Serbia, Bosnia, and Montenegro to join – which they do.



2033–2035: Russia’s cultural outreach peaks with the opening of the Moscow Patriarchate church in Montenegro. Gulf countries’ foundations step up Islamic education initiatives, boosting conservative trends. In Albania, climate change impacts hydropower production, but Chinese-funded AI wind farms stabilise the energy grid. The European Commission announces the Western Balkan states’ inclusion in the Global Gateway framework, showing Brussels’ shift to transactional partnerships.

2035: The US completes its withdrawal from Europe, ending its role as security guarantor in the region. Turkey formally starts managing military bases in Kosovo. North Macedonia exits NATO, reflecting growing discontent with the Alliance and to diversify its relationships with external state actors. China launches a substantial small business investment programme across the Western Balkans. The Emir of Qatar opens Bosnia’s highway and luxury resort project. Serbia’s crypto sector reports record profits, while Bosnia’s truffle industry thrives in Asian markets. Albania’s A.I.-powered wind farms generate economic benefits, representing the region’s ability to adjust despite climate challenges. By the mid-2030s, prosperity relies on hybrid regimes that balance, not reform, under strong external influence.

**Summary of FMI:** By the mid-2030s, the Western Balkans’ stability and growth are sustained by overlapping layers of external influence. Russia’s return is driven by intensified cultural diplomacy, symbolized by Orthodox initiatives such as the Moscow Patriarchate’s church in Montenegro and youth programmes like the ‘Pioneers for a True Europe’ camps. China expands its reach beyond infrastructure and energy into small business investment and A.I.-driven renewable projects, notably wind farms in Albania. The Gulf states consolidate their economic and social footprint through large-scale resort and highway projects in Bosnia and religious education programs in Albania, Bosnia, and North Macedonia. Turkey emerges as a key security actor by taking control of former KFOR bases in Kosovo after NATO’s withdrawal. Meanwhile, the EU maintains a limited, transactional role through its Global Gateway programme. Together, these actors transform the region into a mosaic of competing external influences, where prosperity depends on balancing foreign partnerships rather than pursuing democratic reform or Western integration.

## WB6 Scenario 3: “Authoritarian Crisis”

**Summary:** By 2035, the Western Balkan governments are all consolidated autocracies. The European Commission has formally declared enlargement efforts dead in 2034. NATO remains intact at 32 members and the EU has shifted from offering integration to managing instability and accepting authoritarianism in its neighbourhood. The promise of reform-driven accession has collapsed, leaving the region open to transactional deals with Russia, Turkey, China, and Gulf countries.

Visa-free travel for Balkan citizens to the EU has been revoked, and public anger in the Western Balkans peaks, while inflation surpasses 1990s levels, triggering mass emigration and unrest. Disinformation campaigns continue to reinforce ethnic tensions, while civil society leaders flee into exile. As EU investments dry up, Russia offers energy deals, Turkey becomes a key funder and partner in infrastructure development and weapons production, and China gains a technological foothold. These partnerships ensure local elite’s survival and reinforce authoritarian power and governance.

Europe’s political landscape has at the same time also shifted toward illiberal leadership. In conjunction with the Western Balkans’ consolidation towards autocracies, this leaves the EU to engage pragmatically with a neighbourhood whose former democratic ambitions it has effectively abandoned.

### Timeline:

2025–2026: Russia, facing sluggish growth, seeks long-term energy deals with Western Balkan states, aiming to secure leverage at low cost. Turkey expands its footprint through arms sales to Serbia. In parallel, far-right parties in the EU campaign for limiting Western Balkan migrant workers’ rights, eroding the credibility of integration as a socio-economic pathway. U.S. illiberal factions reinforce these currents rhetorically, giving regional elites a sense that the Balkan countries’ Western partners increasingly tolerate authoritarianism.

2028–2029: Severe heatwaves and droughts reduce agricultural output across the Western Balkans. These shocks intensify economic fragility and create conditions for external state actors to manipulate grievances. Disinformation campaigns, including deepfakes of mostly unknown origins, exploit grievances around inequality and discrimination in society, fuelling ethnic polarization across the region. Civil society organizations, under sustained pressure, relocate their operations to Greece and Turkey, weakening independent oversight in the Western Balkans. Putin’s high-profile visit to Belgrade underscores deepening Russo-Serbian ties. Bilateral agreements expand Moscow’s political influence in the region, competing with the EU for influence. A Eurozone financial crisis sharply reduces European investments and EU financial support for the Western Balkans, deepening perceptions of abandonment, while enlargement prospects become less credible.

2030–2031: Turkey capitalizes on the EU’s retreat, funding major infrastructure projects and offering aid packages. Ankara’s rising economic power makes it an indispensable partner for Balkan governments, while simultaneously eroding EU conditionality. The US brokers an interim peace agreement, leaving Ukraine divided, paired with a mid-term prospect of EU membership in 2033. In the Western Balkans, this prioritization of Ukraine accession over the Western Balkans accelerates disillusionment, fuelling Eurosceptic and nationalist tendencies in the Western Balkans.

2032–2033: After an authoritarian drift, the now militarized EU border agency Frontex deploys 10 000 troops to the Croatia–Bosnia frontier, securing the EU border in an unprecedented hostile fashion. The deployment

demonstrates the EU's exclusionary stance and strengthens local narratives of containment rather than integration. In response, Kosovo and Albania establish a "Union Council," formally presented as an economic initiative. China seizes the opportunity to make significant digital and AI investments in both countries. This development entrenches Beijing's strategic presence in the region, while offering Balkan elites a new external patron unconstrained by democratic governance standards.

2034: The new European Commission president announces that EU enlargement is off the table. Public backlash is immediate: EU leaders are openly booed by crowds in Sarajevo, as some of them visited for damage control after the accession announcement. While this shows that some people are disappointed in the EU's withdrawal, there is also relief among local populations that the process has come to a clear, official end.

2035: The Western Balkans complete their drift into authoritarian rule. Climate shocks contribute to an economic crisis and disinformation campaigns further weaken democratic resilience in society. Inflation reaches historically high levels, causing protests. Governments violently crack down on any dissent and shut down the last democratic civic spaces, with Bosnia and Herzegovina's adopting a foreign agents' law. Serbia exploits its control of the Danube trade routes to further Russian interests. Meanwhile, Turkey and China strengthen their influence through infrastructure, aid, and digitization investment projects. These external connections benefit elites and worsen inequality, while also trapping the region in elite-driven, transactional foreign relations that contribute to its descent into authoritarianism.

**Summary of FMI:** By 2035, foreign influence is the anchor of the Western Balkans' authoritarian consolidation. Russia sustains leverage through long-term energy deals, deepened ties with Serbia, and disinformation campaigns exploiting ethnic divisions. Turkey fills Europe's void with arms sales, infrastructure investment, and aid, becoming indispensable to regional elites. China entrenches its position through major digital and AI projects in Kosovo and Albania, while Gulf countries participate in transactional partnerships that sustain ruling networks. These external ties provide short-term stability but entrench dependency, inequality, and autocratic rule as the EU shifts from integration to containment.

## ANNEX C – EASTERN NEIGHBOURHOOD SCENARIOS

### EN3 Scenario 1: “Nuclear Umbrella”

**Summary:** By 2035, the Eastern Neighbourhood depends on a fragile balance based on nuclear deterrence instead of integration. Ukraine, armed with nuclear weapons from European allies, has become the main security guarantor in the region. Effectively, this dependence on nuclear protection replaces the long-held ambition of EU and NATO membership. Rather than uniting the region, Europe has turned to deterrence for security, leaving Moldova and Georgia trapped in a strengthened buffer-zone logic.

The halt in EU enlargement and NATO expansion leaves space for third actors. Russia, China, and Gulf actors exploit this gap by making transactional deals with local elites and positioning themselves as key supporters. At the same time, democratic freedoms in the EN3 decline, independent media is suppressed, and protests are quelled.

The outcome is a fragile status quo: a nuclear Ukraine in a protective role and Moldova and Georgia effectively relegated to buffer states. The hope for Western integration fades, and foreign influence becomes deeply rooted in local governance structures.

#### Timeline

2025–2026: Moldova undergoes a dramatic shift when pro-Russian forces win the parliamentary election and take political control of the country. At the same time, Russia’s rationale on the economically weakened Transnistria changes. After decades of being a pro-Russian break-away region, Moscow now sees Transnistria’s reintegration with Moldova as a powerful opportunity to increase its overall control of the country. This comes as Russian soft power spreads in both Moldova and Georgia by pushing pro-Russian narratives. Meanwhile, China and the UAE start major infrastructure and investment projects. These investments spur short-term economic growth and create new economic dependencies in the region.

2027: Russia tries to capitalise on its narrative power in Georgia by strengthening discourse on an annexation of Abkhazia and by increasing support for its proxies. While domestic resistance prevents a complete takeover, Moscow shows it is willing to challenge Georgian borders more aggressively. Internally, Georgia’s political system drifts further into authoritarianism in a desperate attempt of elites to cling to power amidst increasing civilian unrest.

2028: Opposition parties in Georgia are merely controlled front organisations - a result of vehement governmental crackdown. Ukraine, stuck in a deadlock with Russia, makes a tough choice: It holds a referendum on the recognition of occupied Crimea as Russian land in exchange for its eastern territories. Open hostilities come to an end, but the political agreement creates lasting wounds that leave Kyiv searching for new ways to prevent a renewed Russian invasion.

2029–2030: The region enters a phase of authoritarian consolidation. In Georgia, politics are tightly controlled, free media and civil society disappear. Moldova’s elites turn to external support, relying on Chinese and Emirati investment to keep stability. Across the region, governments prioritise stability over democratic freedoms, while Western engagement remains unreliable. The lack of credible EU integration

prospects begins to change regional expectations. Stability is now sought not through reform but through deals with foreign powers and deterrence.

2031–2032: The Ukrainian president unveils a plan for nuclear protection of Moldova and Georgia, aiming to turn Kyiv from a vulnerable frontline state into a guarantor of deterrence. The Ukrainian offer divides both societies, drawing attention to the intra-regional political cleavages that only deepened in light of the pro-Russian turn of the past few years. In 2032, Ukraine holds its first post-war election and European allies transfer nuclear weapons to Ukraine as a deterrent from future Russian aggression. Ukraine is granted limited autonomy over its nuclear capabilities, while its European Allies are allowed ultimate oversight. With Ukraine possessing a nuclear deterrent, European leaders step back from their previously integrative rhetoric. EU enlargement stops, NATO expansion is blocked, and Ukraine's nuclear status replaces the security guarantees once linked to the promise membership.

2033–2035: By the mid-2030s, Ukraine is a nuclear power. This new strategy stabilises borders but also traps the region in a system based on weapons instead of cooperation. EU enlargement and NATO expansion remain stalled, which reinforces the idea of a buffer zone, leaving Moldova and Georgia isolated. External forces take advantage of this situation. Russia applies pressure through propaganda and various disinformation tactics. China strengthens its position as the region's economic foundation. By 2035, its infrastructure projects lead in transport and energy routes. Debt trap dynamics give Beijing leverage in policy discussions. Gulf countries, on the other hand, serve as a financial support system for the wealthy, investing in real estate, energy, and logistics centres that reinforce oligarchic networks. Together, these players create a political economy that relies on outside influence, where local governments maintain power by exchanging sovereignty for investment and security.

**Summary of FMI:** With EU and NATO expansion effectively halted, a strategic vacuum emerges that external powers seek to exploit. Russia reasserts itself through covert networks, disinformation, and political manipulation by promoting reintegration narratives in Transnistria and Abkhazia while backing authoritarian elites who trade sovereignty for stability. China leverages major infrastructure and energy investments to create debt dependency and policy influence, quietly aligning regional development with its own economic and strategic priorities. The UAE and other Gulf actors embed themselves through high-level financial partnerships and elite capture, reinforcing oligarchic governance across Moldova and Georgia. By the mid-2030s, these overlapping layers of foreign influence define a new order in which sovereignty is transactional and deterrence, not integration, is the organizing principle of regional stability.

## EN3 Scenario 2: “Emerging from Chaos”

**Summary:** By 2035, the Eastern Neighbourhood has changed significantly but remains unstable. Georgia and Moldova are now part of the European Union, the Eurozone and Schengen. Ukraine, while also in the EU, is struggling with growing concerns over democratic decline as autocratic parties take control of its parliament. Moldova and Ukraine complete a territorial swap. Southwestern Russian oblasts, torn apart by years of chaos, seek to join Ukraine and Georgia.

Russia is still in disorder, divided by domestic unrest following Putin’s death. NATO and the United States keep a strong presence, forcing Moscow to pay reparations for its nuclear strike in Ukraine. China, once an ally of Russia in the war, has shifted to support the West, standing with the United States as a partner to Ukraine. The region emerges from a decade of turmoil, becoming more integrated with Europe. But its future stability is threatened by democratic decline in Ukraine and the uncertain effects of Russia’s collapse after Putin’s death.

### Timeline:

**2025-2026:** In June 2025, independent media reveal large-scale Russian infiltration of Moldovan and Georgian intelligence services. This exposure sparks political crises. External state actors respond by supporting groups aimed at weakening anti-corruption reforms and judicial independence, focusing mainly on Moldova but also targeting Ukraine. By spring 2026, China strengthens Russia’s defence industry by supplying advanced weapons systems that extend Moscow’s military efforts. While this temporarily boosts the Russian war effort, it is also a sign of the growing fragility of Russia’s own war economy.

**2027:** Because its war-time economy is crumbling, Russia becomes desperate to end the war in Ukraine. To force Ukrainian capitulation in March 2027, Russia escalates the conflict with a limited nuclear strike near Kharkiv, destroying a military-industrial computer hub. This attack shocks the world and further isolates Moscow, including from China. It also fundamentally fails to achieve its goal: Ukraine does not capitulate. In September, Putin dies in a plane crash while traveling to Donetsk, forcing interim leaders to cancel celebrations for territorial incorporation. In October, these authorities announce the end of the “special military operation” in Ukraine. By November, Georgian president and oligarch Ivanishvili flees to Brazil, representing the collapse of Russian-aligned networks in the region.

**2028:** In February 2028, a new Georgian government releases political prisoners, marking a clear pro-European shift. In June, Ukraine prepares for its first postwar elections, where pro-European parties are expected to win. The power vacuum left by Putin exposes a deeply fragile and fragmented political landscape where no other actor can concentrate enough power to demonstrate de facto leadership. By the end of the year, Russia is in chaos, filled with riots after a failed paramilitary coup.

**2029-2030:** In spring 2029, Georgia and the de facto authorities in Abkhazia and South Ossetia begin meaningful negotiations without Russia. That autumn, Moldova’s parliamentary elections produce a strong pro-European coalition. In September 2030, Georgia, Moldova, and Ukraine join the European Union. Shortly after, Moldova and Ukraine start negotiations over territorial swaps.

**2032:** Ukraine’s democratic progress stalls as autocratic parties gain dominance in parliament. Meanwhile, after years of unrest, three Russian oblasts hold referendums to join Georgia or Ukraine, further reshaping the region’s geopolitical landscape.

2035: At the Prague EU summit, Georgia, Ukraine and Moldova celebrate five years of EU membership by joining the Eurozone and Schengen. Moldova and Ukraine complete their territorial swap agreement. Concerns grow as Georgia and Moldova lead a campaign warning against Ukraine's democratic backsliding. Meanwhile, southwestern Russian oblasts continue to push for integration with Georgia and Ukraine. NATO and the United States demand reparations from Moscow for its nuclear strike. China aligns with Washington as an ally of Kyiv, supporting Ukraine's sovereignty. While Beijing's support is welcome, it also increasingly raises questions about the outlook of encroaching Chinese influence in a democratically fragile Ukraine.

**Summary of FMI:** Foreign influence in the Eastern Neighbourhood after 2025 has evolved from overt Russian manipulation to a more complex, multi-actor contest. Russia's early infiltration of Moldovan and Georgian institutions set out to obstruct reforms and maintain leverage but collapsed alongside Moscow's internal disintegration. China then filled part of the vacuum, first as a supplier to Russia, later repositioning as a postwar investor and partner to Ukraine. By 2035, Beijing's economic and technological engagement has become a key external force shaping Ukraine's governance and dependencies.



## EN3 Scenario 3: “Dream Team”

**Summary:** By 2035, the Eastern Neighbourhood is fully integrated into the Euro-Atlantic order. Ukraine, Georgia, and Moldova are members of both the EU and NATO, with Moldova also part of Schengen and the Eurozone. Following its democratic transition, Belarus has applied for EU membership, while Armenia has been granted candidate status. NATO maintains a large navy base in Sevastopol, symbolizing NATO’s power in the Black Sea region.

Russia is weakened, facing internal demands for independence and gradual democratization under ongoing UN oversight of its nuclear arsenal. The ICC has found senior Russian officers guilty of war crimes, further reducing Moscow’s international standing. After some internal turmoil, the United States again plays a constructive role in NATO, while the EU has become the primary driver of expansion and rebuilding in the region. Authoritarian nostalgia remains only in small, isolated areas and cannot meaningfully challenge the broader move toward democracy.

### Timeline:

**2026-2027:** China supplies spyware to the Georgian government, which uses it to crack down on pro-democracy protesters and reporters. Despite this threat, an independent media source manages to publish an exposé on previously suspected, but underestimated, Russian infiltration of Georgia’s intelligence services, leading to civic mobilization. As a result of wide-spread political mobilization, in 2027, the reigning Georgian Dream party loses elections in a pro-European political shift. At the same time, the EU starts a treaty reform convention to get ready for enlargement.

**2028-2029:** Putin’s illness weakens his regime’s stability, as fights about his succession start to expose deep internal fractures in leadership circles. In the United States, Trump exploits a constitutional loophole for a third successful presidential campaign. The cementation of Trump’s isolationism pushes the EU to strengthen internal unity and increase military support for Ukraine. Meanwhile, Russia’s festering internal fragmentation over succession and the fatigue over the drawn-out war in Ukraine led to a neglect of supplying its proxies in Transnistria, allowing Moldova to use this momentum to peacefully reintegrate the breakaway region. In the Western Balkans, Montenegro joins the EU, and reforms agreed upon at the Podgorica summit prepare the Union for further enlargement.

**2030-2031:** In early 2030, the Kremlin announces a week of mourning as Putin dies of illness. Ukraine makes use of this moment of chaos and secures victory in 2030, thanks to EU military backing, a divided Russian leadership, and an army plagued by low morale. This leads to the liberation of Crimea, the capture of Russian generals, and their subsequent trial by the ICC. A peace agreement is then signed between Ukraine and Russia. Due to the weakened Russian negotiating position, the Ukrainian delegation succeeds in pushing for conditions that ensure a long-term and expansive peace: Russia renounces its claims for the long-contested Georgian territories and agrees to host a UN nuclear monitoring mission overseeing its nuclear facilities.

At the same time, Russian troops withdraw from Abkhazia and South Ossetia on the condition that the EU remains relatively absent in monitoring and reconstruction efforts. Therefore, the UN establishes a monitoring and transitional assistance mandate in Georgia to confirm territorial integrity. The EU launches a reconstruction plan for Ukraine, but Russia seeks to retain its influence in Europe through energy blackmail by cutting gas supplies.

2031: Trump is impeached after being revealed as a Russian asset. As the larger Russian geopolitical network starts to crumble, Lukashenka is overthrown in Belarus, starting the country's long-awaited transition. Georgia adopts a confederal model to reintegrate its territories, Ukraine holds its first post-war elections without Zelensky, and Moldova joins both the EU and NATO.

2032-2033: Ukraine and Georgia join NATO, strengthening the Alliance's presence in the Black Sea. Armenia applies for EU membership. Russia tries to evoke Soviet nostalgia in the Eastern Neighbourhood through art and popular culture, but the impact is minimal. Meanwhile, Chechnya and Dagestan seek secession, and Russia holds its first competitive democratic elections.

2034-2035: Ukraine and Georgia finish their EU accession negotiations in 2034. In 2035, Moldova celebrates Unification Day, and EU leaders at a summit in Chisinau sign accession treaties for Ukraine and Georgia. Moldova joins Schengen and the Eurozone, Belarus applies for EU membership, and Armenia becomes a candidate. NATO opens its largest navy base in Sevastopol. The ICC convicts several high-ranking Russian officers for war crimes and crimes against humanity. In the US, the Republican Party releases a report on abuses during the Trump years. From his forced exile in Doha, Erdoğan criticises Turkey's pro-EU policies. In Moscow, 5 000 loyalists commemorate the fifth anniversary of Putin's death. At the same time, Russia starts constitutional reform to address secessionist demands, and the UN nuclear monitoring mission is extended until 2037.

**Summary of FMI:** Even as Ukraine, Georgia, and Moldova integrate into the EU and NATO, external state actors attempt to shape outcomes according to distinct strategies. Russia, weakened and internally fragmented, uses media and cultural nostalgia to maintain limited influence. Energy leverage is deployed selectively, but its capacity to project power is constrained by democratic reforms and international oversight. China provides targeted technologies, such as spyware, to influence internal governance, exploiting transitional vulnerabilities while balancing its broader alignment with the West. With Turkey's turn towards the West, Erdoğan's voice from exile fails to assert much influence over CC trajectories.

## ANNEX D – OVERVIEW OF DATA SOURCES

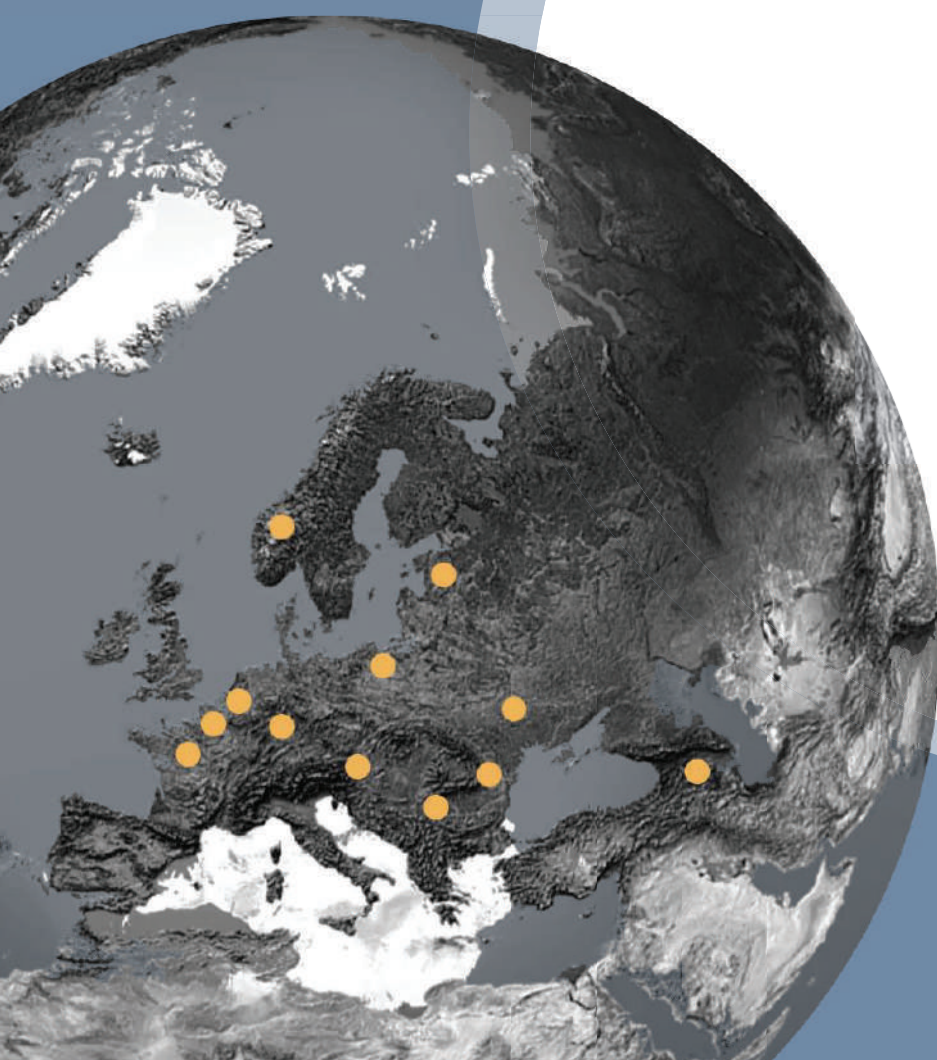
Table D1: Overview of variables included in the forecast and their sources

| Variable Name              | Source                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Composition                                                                           | Description                                                                                                                                                    |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Trade Volume               | GEO-POWER-EU (2025a):<br>- Exports of goods, in % of country's GDP (Indicator code: E_EXP_GOODS_GDP)<br>- Imports of goods, in % of country's GDP (Indicator code: E_IMP_GOODS_GDP)<br>- Exports of raw materials, in % of country's GDP (Indicator code: E_EXP_GOODS_PRIMARY_GDP)<br>- Imports of raw materials, in % of country's GDP (Indicator code: E_IMP_GOODS_PRIMARY_GDP)<br>- Exports of services, in % of country's GDP (Indicator code: E_EXP_SERVICES_GDP)<br>- Imports of services, in % of country's GDP (Indicator code: E_IMP_SERVICES_GDP) | All indicators are added up with equal weighting as they are all measured in % of GDP | The volume of imports and exports of goods, services, raw materials between a CC and EA per year. Measured in % of CC's GDP                                    |
| Financial Inflows          | GEO-POWER-EU (2025a):<br>- FDI inward stock, in % of country's GDP (Indicator code: E_FDI_INWARD_STOCK_GDP)<br>- Remittances, in % of country's GDP (Indicator code: E_REMITTANCES_GDP)                                                                                                                                                                                                                                                                                                                                                                     | All indicators are added up with equal weighting as they are all measured in % of GDP | The volume of foreign direct investment inward stock as well as the remittances. Measured in % of CC's GDP.                                                    |
| Gross External Debt        | GEO-POWER-EU (2025a): Gross external debt, in % of country's GDP (Indicator code: E_EXT_DEBT_STOCK_GDP)                                                                                                                                                                                                                                                                                                                                                                                                                                                     | /                                                                                     | Gross external debt of a CC owed to China or Russia. Measured in % of CC's GDP                                                                                 |
| Development Assistance     | GEO-POWER-EU (2025a): Official development assistance, USD m (Indicator code: E_DEV_ASSISTANCE_INT)                                                                                                                                                                                                                                                                                                                                                                                                                                                         | /                                                                                     | Level of official development assistance (ODA) according to the OECD definition from Russia or China to a CC. Measured in million USD.                         |
| CC Students studying in EA | GEO-POWER-EU (2025a): Students relative to Population (Indicator Code: SOC_EDU_STUDENT_REL)                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | /                                                                                     | Share of students from CCs in tertiary education studying in China or Russia. Measured per 10.000 inhabitants of CC population                                 |
| Share of CC migrants in EA | GEO-POWER-EU (2025a): International migrants as a share of external actors' population (SOC_MIGR_STOCK_ACTORS_REL)                                                                                                                                                                                                                                                                                                                                                                                                                                          | /                                                                                     | Number of international migrants as defined by the Population Division of the UN from CC in China or Russia. Measured per 1000 inhabitants of Russia or China. |
| Share of EA migrants in CC | GEO-POWER-EU (2025a): International migrants as a share of WB6 and EaP3 countries' Population (Indicator Code: SOC_MIGR_STOCK_TARGET_REL)                                                                                                                                                                                                                                                                                                                                                                                                                   | /                                                                                     | Number of international migrants as defined by the Population Division of the UN from China or Russia in a CC. Measured per 1000 inhabitants of CCs.           |

|                                            |                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                        |                                                                                                                                                                                            |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Number of Cultural Institutions            | GEO-POWER-EU (2025a): Cultural institutions of external state actors (Indicator code: SOC_CULTURE)                                                                                                                                                                                                                                                                                                    | /                                                                                                                                      | The number of cultural institutions from China or Russia in a CC                                                                                                                           |
| External Actor Troops                      | GEO-POWER-EU (2025a): Deployment of military troops (Indicator code: S_MIL_TROOPS)                                                                                                                                                                                                                                                                                                                    | /                                                                                                                                      | Number of Russian or Chinese troops permanently stationed in a CC                                                                                                                          |
| Arms Sales                                 | GEO-POWER-EU (2025a): Military equipment Transfers as % of GDP (indicator code: S_MIL_EQ_TRANSFER_VALUE)                                                                                                                                                                                                                                                                                              | /                                                                                                                                      | Value of military equipment in USD supplied by external state actors to WB6 and EN3. Original numbers are from SIPRI TIV.                                                                  |
| Number of Fatalities <sup>A</sup>          | Uppsala Conflict Data Program (UCDP) Georeferenced Event Dataset (Davies et al., 2024; Sundberg et al., 2013)                                                                                                                                                                                                                                                                                         | /                                                                                                                                      | Number of conflict fatalities per country-pair-year                                                                                                                                        |
| Number of Cyber Attacks                    | - European Repository of Cyber Incidents dataset V 1.3 (Zettl-Schabath et al., 2025) retrieved from <a href="https://eurepoc.eu/database/">https://eurepoc.eu/database/</a> in August 2025.<br>- Maryland University's Cyber Event dataset (Harry et al., 2018), requested on <a href="https://cisssm.umd.edu/cyber-events-database">https://cisssm.umd.edu/cyber-events-database</a> in August 2025. | Both databases were merged. To avoid double counting, instances were only counted if they did not have duplicate in the other database | The number of cyber-attacks from China and Russia on all a given CC per year. The data was filtered to reflect only government or government associated Chinese or Russian actors.         |
| Number of Sanctions                        | Global Sanction Database V4 (Felbermayr et al., 2020; Yalcin et al., 2025). Requested from <a href="https://www.globalsanctionsdatabase.com/">https://www.globalsanctionsdatabase.com/</a>                                                                                                                                                                                                            | /                                                                                                                                      | The number of sanctions from China and Russia on all a given CC per year                                                                                                                   |
| CC Imports <sup>B</sup>                    | UN Comtrade database (United Nations Statistics Division, 2025) retrieved from <a href="https://comtradeplus.un.org/">https://comtradeplus.un.org/</a> in September 2025                                                                                                                                                                                                                              | /                                                                                                                                      | Total trade value in USD of imports of goods (HS) from China or Russia                                                                                                                     |
| CC Exports <sup>B</sup>                    | UN Comtrade database (United Nations Statistics Division, 2025) retrieved from <a href="https://comtradeplus.un.org/">https://comtradeplus.un.org/</a> in September 2025                                                                                                                                                                                                                              | /                                                                                                                                      | Total trade value in USD of exports of goods (HS) to China or Russia                                                                                                                       |
| Polecat Political Influencing <sup>B</sup> | Political Event Classification, Attributes, and Types (POLECAT) dataset (Scarborough et al., 2023) retrieved from <a href="https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi:10.7910/DVN/AJGVIT">https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi:10.7910/DVN/AJGVIT</a> in September 2025.                                                                                    | /                                                                                                                                      | Coded as one if the average event intensity per country-pair-month is between 0 and -6 (Event types, request, accuse, reject, threaten, protest, sanction, mobilize). Coded 0 if otherwise |
| Polecat Security                           | Political Event Classification, Attributes, and Types (POLECAT) dataset (Scarborough                                                                                                                                                                                                                                                                                                                  | /                                                                                                                                      | Coded as one if the average event intensity per country-pair-month is between -6.1 and -10                                                                                                 |

|                                              |                                                                                                                                                                                                                                     |                                                                                                                                                             |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Influencing<br>B                             | et al., 2023) retrieved from<br><a href="https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi:10.7910/DVN/AJGVIT">https://dataverse.harvard.edu/dataset.xhtml?persistentId=doi:10.7910/DVN/AJGVIT</a><br>in September 2025. | (event types mobilize, coerce, assault). Coded 0 if otherwise                                                                                               |
| Number of<br>Security<br>Events <sup>B</sup> | Armed Conflict Location and Event Dataset /<br>(ACLED) (ACLED, 2025; Raleigh et al., 2010).<br>Retrieved from: <a href="https://acleddata.com/">https://acleddata.com/</a> in<br>September 2025                                     | The event counts per country-pair-month. Actors were filtered to reflect Chinese or Russian government-related actors. No event types were excluded         |
| Number of<br>Fatalities <sup>B</sup>         | Armed Conflict Location and Event Dataset /<br>(ACLED) (ACLED, 2025; Raleigh et al., 2010).<br>Retrieved from: <a href="https://acleddata.com/">https://acleddata.com/</a> in<br>September 2025                                     | The number of fatalities per country-pair-month. Actors were filtered to reflect Chinese or Russian government-related actors. No event types were excluded |
| Number of<br>Leader<br>Meetings <sup>B</sup> | GEO-POWER-EU (2025a): Leader meetings /<br>(Indicator code: P_MEETINGS_CAT2)                                                                                                                                                        | Count of meetings between the main leaders of a WB6 or EN3 country and their counterparts from each external actor per year and country pair                |

Note. A = only in annual dataset; B = only in monthly dataset



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