



Foreign Interference of China, Russia and Turkey in the EU Enlargement Countries until 2035: Three Scenarios and Policy Implications

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Executive Summary

Foreign Interference of China, Russia and Turkey in the EU Enlargement Countries until 2035: Three Scenarios and Policy Implications

This policy paper examines how Russian, Chinese, and Turkish influence in the Western Balkans and the Eastern Trio may evolve by 2035, combining the InvigoratEU External Influence Index with a structured strategic foresight approach. The Index documents a sharp decline and high volatility in Russian influence since 2013, driven by war dynamics, sanctions, and geopolitical rupture, alongside a more incremental expansion of Chinese and Turkish influence through economic engagement, connectivity initiatives, and socially embedded networks.

Building on these empirical patterns, the paper identifies key drivers of external influence, drawing on political, economic, and societal dimensions, and reorganising them into higher-order strategic clusters that underpin a two-axis scenario framework. The first axis captures the strength of EU anchoring in candidate countries, understood as the interaction between EU credibility and domestic alignment, while the second concerns the nature of the international system, ranging from a rules-based order to coercive, “might-makes-right” dynamics. Crossing these axes yields three plausible scenarios for 2035: Great-Power Chessboard, characterised by intensified external leverage and weakened EU anchoring; Resilient Europe, where credible EU engagement, gradual integration, and domestic governance reforms reduce vulnerabilities; and Strategic Tug-of-War, a baseline trajectory marked by sustained hybrid competition and partial EU anchoring.

Across all scenarios, the analysis shows that external influence is not predetermined but contingent on governance capacity, societal resilience, and the credibility and delivery of EU engagement. While Russia’s trajectory remains uniquely volatile and shaped by critical uncertainties linked to the war in Ukraine, China’s and Turkey’s influence evolves more predictably within structural constraints set by EU policy choices and domestic conditions. The paper concludes that strengthening EU anchoring – through credible enlargement, gradual integration, and sustained support for governance and societal resilience – remains the most effective strategy to limit destabilising external influence and reinforce long-term stability in the EU’s enlargement countries.

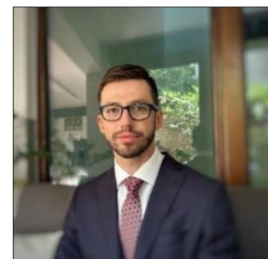
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About InvigoratEU

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

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1 Introduction

The EU enlargement countries are entering a decisive decade, as EU enlargement has regained momentum as a geostrategic imperative after Russia's 2022 invasion of Ukraine. In this context, the Western Balkans (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia) and the Eastern Trio (Georgia, Moldova and Ukraine) – all EU candidate or potential candidate countries – face overlapping challenges shaping their political, economic and societal trajectories, including war, security crises, energy uncertainty, governance fragility, demographic decline and a rapidly shifting global environment. These challenges interact with a growing presence of external actors whose influence affects domestic politics, economic choices and societal perceptions. Russia, China and Turkey, in particular, have long projected power in the region, although the scale, methods and objectives of their engagement have changed. Understanding how these dynamics may evolve over the coming years is therefore essential to counteracting the destabilising effects of external influence and invigorating EU engagement and cooperation with enlargement countries, in support of a more resilient Europe.

The present policy paper addresses this need by combining empirical measurement with strategic foresight. It draws on the InvigoratEU External Influence Index, a systematic tool tracking political, economic and societal influence of Russia,¹ China² and Turkey³ across eleven years and all the EU enlargement countries in Eastern and Southeastern Europe, treating Turkey analytically as an external actor in light of the prolonged suspension of its accession negotiations and its evolving regional role. The Index helps to shed light on why influence expands in some contexts while remaining constrained in others. It suggests that Russian influence follows a highly volatile pattern, with sharp shifts driven by geopolitical ruptures, war dynamics and an increasing reliance on coercive instruments. Chinese influence follows a more stable upward path shaped by investment, connectivity diplomacy and selective institutional engagement. Turkish influence, by contrast, is more socially embedded, sustained by cultural proximity, diaspora networks, education links and pragmatic cooperation.

The empirical findings of the Index provide the starting point for a structured forward-looking analysis exploring how influence trajectories could unfold by 2035. Building on these empirical patterns, the paper then employs strategic foresight methods to identify key drivers, clarify uncertainties and outline plausible future trajectories, rather than making predictions about the future. The exercise identifies two systemic axes that structure the future. The first axis concerns the strength of EU anchoring in candidate states, understood as the interaction between the credibility of EU accession prospects and domestic alignment with reform and integration commitments. The second axis concerns the nature of the international environment, ranging from a rules-based order to a coercive and highly contested global system. Combining these dimensions yields three plausible scenarios: (1) The “Great-Power Chessboard” scenario, which imagines a world in which power-driven

¹ Marko Todorovi: Long Policy Report on Russia's Ambitions and Leverage, May 2025, <https://zenodo.org/records/17338235>

² Matteo Bonomi: Chinese Influence In The Eastern Trio And The Western Balkans: Strategic Fragmentation In The EU's Enlargement Countries, August 2025, <https://zenodo.org/records/17338857>.

³ Marko Todorovi: Long Policy Report on Turkey's Ambitions and Leverage, September 2025, <https://zenodo.org/records/17339529>.

international competition intensifies and EU credibility weakens; (2) the “Resilient Europe” scenario, which shows how the regional environment changes when EU engagement is consistent and transformative; and (3) the “Strategic Tug-of-War” scenario, which captures the mixed and competitive landscape emerging from the incremental and largely linear evolution of many of today’s dynamics.

Across these possible futures, one insight remains constant. External presence is inevitable, but its capacity to become destabilising depends on the interaction between domestic resilience, EU anchoring, and the broader international environment. External leverage expands where governments remain fragile, institutions are easily politicised, EU commitment appears uncertain, and international competition unfolds in a more coercive and permissive global context. Conversely, it recedes where the EU is present, credible, and able to deliver, where domestic institutions strengthen their resilience, and where external competition remains constrained by rules-based frameworks. These dynamics place responsibility on both sides. Candidate states must advance reforms that reduce vulnerability to external pressure. The EU must demonstrate that enlargement is a strategic project supported by political determination, financial resources, and a clear vision of shared security and prosperity.

This paper contributes to these efforts by providing a structured reading of plausible futures and by translating the findings of the External Influence Index into forward-looking analysis. It distils the drivers behind external influence, examines how they interact with domestic and European choices and formulates recommendations for governments, EU institutions, regional bodies, civil society and the private sector. By linking empirical evidence with strategic foresight, the paper aims to clarify how different configurations of domestic capacity, external influence and EU engagement may shape the strategic environment of enlargement countries over the coming decade. The scenarios are intended to inform policy choices by highlighting where structural constraints are likely to persist and where agency and strategic action remain possible.

2 Methodology: From Empirical Index to Strategic Foresight Scenarios

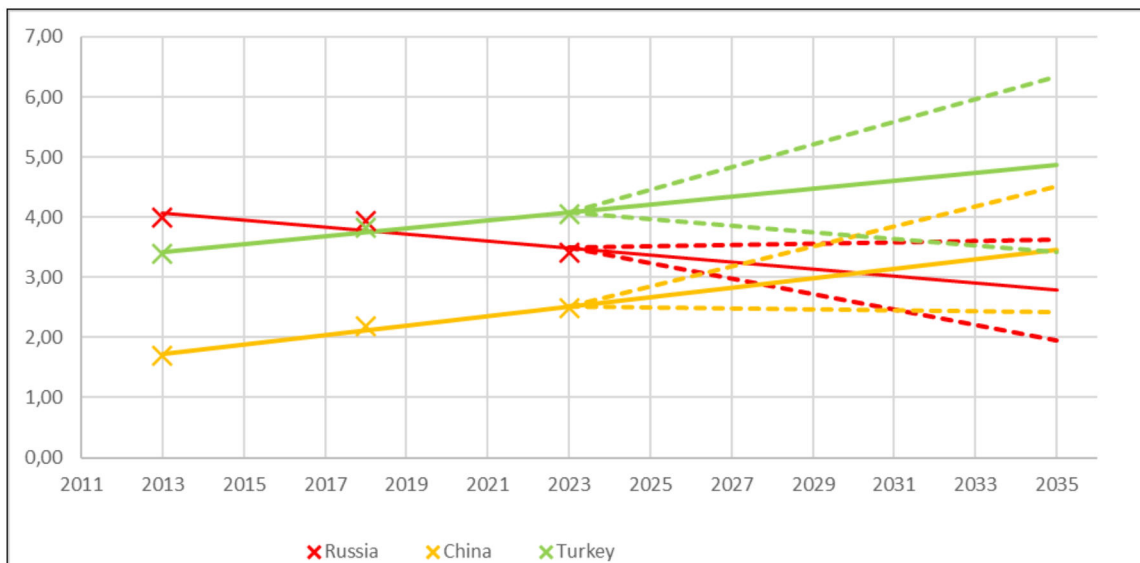
The paper’s methodology combines trend-based projection methods and strategic foresight approaches to build three forward-looking ideal-type scenarios of how the geopolitical ambitions of China, Russia and Turkey translate into external influence under different strategic conditions in EU candidate (and potential candidate) countries of the Eastern Trio and the Western Balkans. It takes stock of these actors’ ambitions and leverage in the political, economic, and societal dimensions as captured by the InvigoratEU External Influence Index. The Index assesses influence trends over an eleven-year period (2013–2023) using 2013, 2018, and 2023 as benchmark years, and evaluates the extent and intensity of engagement of the three countries across multiple channels of external leverage.

The political-security dimension includes participation in bilateral and multilateral forums, interference in domestic politics, military cooperation, foreign-policy alignment, and

involvement in issues of key national interest. The economic dimension covers regulatory frameworks, trade volumes, investment flows, strategic asset ownership, energy dependence, and debt exposure. The societal dimension includes people-to-people interactions, cultural and informational presence, and public perceptions. Each indicator is scored on a 0–3 scale, weighted, aggregated across the three dimensions, and rescaled to 0–10 for comparability across time and countries.

Figure 1 presents the overall influence index by external actor in the two regions (aggregated across all countries) for 2013, 2018, and 2023. It then extrapolates linear projections across those years and extends them to 2035. The InvigoratEU External Influence Index shows a gradual overall decline in Russian influence, reflecting the deterioration of relations mainly with Ukraine between 2013 and 2018, followed by the broader geopolitical rupture with most analysed countries – often including sanctions and strategic decoupling – after the full-scale invasion of Ukraine in 2022. In contrast, Chinese influence has gradually increased, driven by economic engagement, infrastructure diplomacy, and institutional presence. Turkish influence has also strengthened steadily, benefiting from geographic proximity, cultural and religious ties, and pragmatic diplomacy. These trajectories provide a quantitative foundation for the forward-looking analysis.

Figure 1 External Influence Trends, Linear Projections and Stylised Stress-Test Trajectories in EU Enlargement Countries (2013–2035)



To explore future dynamics, the Index is projected to 2035 along three hypothetical paths. The linear trajectory extrapolates past trends, offering a neutral baseline projection. The accelerated (+30%) and decelerated (-30%) trajectories are stylised stress-tests around this baseline, designed to assess the sensitivity of influence trajectories to different strategic conditions rather than to produce probabilistic forecasts. The +/-30% range represents a heuristic stress band: it is sufficiently wide to capture meaningful divergence from observed trends while remaining within historically plausible bounds across the Index dimensions.

Table 1 summarises the results of these projections by presenting country-level influence estimates for Russia, China, and Turkey in 2035 under the baseline and stress-test trajectories. These projections serve as a structured quantitative reference for the

subsequent analytical phase, providing empirical inputs for the identification of drivers and the construction of foresight scenarios, rather than constituting aggregate forecasts.

Table 1 Trend-Based Projections of External Influence in 2035 Across Baseline and Stylised Stress-Test Trajectories (+30% / -30%)

	2035 (Baseline Linear Projection)			2035+ (Accelerated Stress-Test, +30%)			2035- (Decelerated Stress-Test, -30%)		
Country	Russia	China	Turkey	Russia	China	Turkey	Russia	China	Turkey
Albania	very low (1,77) ↑=	low (2,01) ↑+	moderate (5,75) ↑=	low (2,30) ↑+	low (2,61) ↑+	high (7,47) ↑+	very low (1,24) ↑=	very low (1,41) ↓=	moderate (4,02) ↓=
Bosnia and Herzegovina	moderate (5,29) ↑=	moderate (4,73) ↑+	moderate (5,11) ↑=	high (6,88) ↑+	high (6,15) ↑++	high (6,65) ↑+	low (3,71) ↓-	low (3,31) ↑=	low (3,58) ↓-
Georgia	high (6,77) ↑+	moderate (4,62) ↑+	moderate (5,52) ↑=	very high (8,81) ↑++	high (6,01) ↑++	high (7,17) ↑+	moderate (4,74) ↓=	low (3,24) ↑=	low (3,86) ↓-
Kosovo	very low (1,34) ↑=	low (2,02) ↑+	high (6,45) ↑+	very low (1,74) ↑=	low (2,62) ↑+	very high (8,39) ↑++	very low (0,94) ↓=	very low (1,41) ↑=	moderate (4,52) ↓=
Moldova	low (3,96) ↓-	very low (1,84) ↑=	low (2,79) ↑=	moderate (5,14) ↓=	low (2,40) ↑+	low (3,63) ↑=	low (2,77) ↓-	very low (1,29) ↑=	very low (1,95) ↓-
Montenegro	low (3,13) ↓=	moderate (4,06) ↑+	moderate (5,15) ↑+	moderate (4,07) ↑+	moderate (5,28) ↑+	moderate (6,69) ↑++	low (2,19) ↓=	low (2,84) ↑=	low (3,60) ↑=
North Macedonia	very low (0,84) ↓=	very low (1,34) ↓=	moderate (5,25) ↑=	very low (1,09) ↓=	very low (1,74) ↑=	moderate (6,83) ↑+	very low (0,59) ↓=	very low (0,94) ↓=	low (3,68) ↓=
Serbia	moderate (5,41) ↑=	high (7,60) ↑+	low (3,00) ↑=	high (7,03) ↑+	very high (9,41) ↑++	low (3,90) ↑=	low (3,79) ↓-	moderate (5,32) ↑=	low (2,10) ↓=
Ukraine	very low (0,33) ↓-	low (3,66) ↓=	low (4,88) ↑+	very low (0,43) ↓-	moderate (4,66) ↑+	moderate (6,35) ↑+	very low (0,23) ↓-	low (2,66) ↓=	low (3,42) ↓=

Note: Qualitative categories (very low–very high) correspond to rescaled Index values (0–10). Arrows (↑ / ↓) indicate the direction of the projected trend relative to the 2023 value. Category change indicators (= / + / ++ / -) specify whether the projected value remains within the same qualitative category (=), shifts to a higher category (+), shifts across more than one category (++), or shifts to a lower category (-) compared to 2023.

Taken together, the projections reveal contrasting patterns of directional stability across external actors. China's and Turkey's trajectories display relatively consistent directional trends over time, reflecting structural drivers that have evolved in a largely incremental and

path-dependent manner over the past decade. Russia, by contrast, exhibits the highest degree of directional volatility, mirroring the profound disruptions introduced by war, sanctions, and political rupture, resulting in less predictable links between intent and effective influence. Moreover, because the Index captures external influence and soft power rather than coercive control or imposed dominance, it cannot fully anticipate disruptive breakpoints such as decisive military outcomes or territorial annexation. Such outcomes are therefore treated in the scenario narratives as potential wild cards that may push trajectories beyond the logic of trend-based projection. Table 1 should thus be read as a heuristic device: it delineates plausible ranges grounded in empirical evidence, while acknowledging that extreme geopolitical shocks may generate discontinuities beyond the modelled expectations.

To move from trend-based projection to strategic foresight, the analysis draws on a series of structured analytical workshops centred on the Index's trendlines and stylised stress-test trajectories as presented in Table 1. These workshops examined how observed patterns of stability, gradual change, and volatility translate into underlying drivers of external influence, organised consistently along the political, economic, and societal dimensions that structure the Index itself. Through this interpretative process, the observable trendlines and projected trajectories were used to surface the key sources of variation and discontinuity in external influence. The identification of drivers therefore does not result from a mechanical extrapolation of trends, but from an evidence-based synthesis combining empirical patterns with expert judgement, providing the analytical bridge between quantitative projection and the construction of strategic foresight scenarios.⁴

Through synthesis and clustering, the drivers identified through the Index projections and workshop process were condensed into two higher-order structural axes that organise the scenario space. The first axis captures variation in the strength of EU anchoring toward candidate (and potential candidate) states, understood as the interaction between the credibility of EU accession prospects and domestic alignment with reform and integration commitments. The second axis reflects the nature of the international environment, ranging from a rules-based order to a coercive, "might-makes-right" system. These axes do not introduce new variables, but aggregate recurring patterns observed across political, economic and societal drivers into a simplified strategic framework. They provide the organising logic for the scenario space developed in Section 4 and operationalised through the three scenarios presented in Section 5.

Building on this framework, Section 3 examines the key drivers of external influence identified through the projection and workshop process. Section 4 then elaborates the two structural axes and the resulting scenario space, which underpin the three scenario

⁴ The identification of key drivers of external influence was supported by a series of structured expert workshops organised within the project consortium, constituting a key methodological step in the transition from trend-based projection to strategic foresight. Actor-specific workshops were conducted on Russia (led by the Institute for European Policy – IEP), Turkey (led by the European Policy Centre – CEP), and China (led by the Istituto Affari Internazionali – IAI). Each workshop produced written analytical inputs, which were subsequently discussed and synthesised in a joint online workshop involving IAI, CEP, IEP, and the Barcelona Centre for International Affairs (CIDOB), ensuring cross-validation and integration of the identified drivers into a coherent scenario framework.

narratives developed in Section 5. Sections 6 and 7 subsequently interpret the strategic implications and distil conclusions and policy recommendations.

3 Key Drivers of External Influence in EU Enlargement Countries

Building on the trend-based projections of the InvigoratEU External Influence Index and the structured expert workshops described in the previous section, this section identifies the key drivers shaping the future evolution of external influence in EU candidate and potential candidate countries. These drivers are not treated as deterministic predictors of future outcomes. Rather, they capture the main sources of variation and uncertainty that condition how influence trajectories may diverge from their historical paths under different strategic configurations.

Methodologically, the drivers emerge from an interpretative synthesis that combines empirical trend analysis, comparative patterns of variation across countries and external actors, and structured expert judgement. Taken together, this process allows the analysis to move beyond trend extrapolation toward an explanation of why external influence expands, stabilises, or contracts in specific contexts.

For analytical clarity, the dependent variable throughout this exercise is the level, composition, and political relevance of external influence exerted by Russia, China, and Turkey in EU enlargement countries by 2035. The drivers discussed below function as independent or conditioning variables, shaping exposure, resilience, and strategic alignment. While initially surfaced along the political, economic, and societal dimensions reflected in the Index, these drivers are reorganised here into four broader strategic clusters that correspond more directly to the logic of scenario construction.

Together, these clusters clarify what the scenario exercise seeks to explain: not precise influence scores in 2035, but the conditions under which external influence becomes stabilising, competitive, or destabilising across different futures.

The Future of the European Union

The European Union constitutes the single most consequential structural driver shaping the regional environment of EU enlargement countries. Its credibility, openness, and capacity to act as a transformative anchor fundamentally condition whether domestic reforms advance, stagnate, or become reversible – and, by extension, the space available for external actors.

EU enlargement credibility operates as a central driver of resilience. Where accession prospects are clear, conditionality credible, and material support sustained, reform incentives strengthen and external leverage narrows. Conversely, uncertainty, delays, or selective engagement weaken the EU's anchoring role and increase incentives for candidate countries to diversify partnerships or engage in transactional balancing. This

dynamic is visible in the Index data, where periods of stalled enlargement coincide with greater volatility in Russian, Chinese, and Turkish influence.

Beyond enlargement policy narrowly defined, the EU's broader strategic posture also matters. The Union's security and defence engagement toward candidate countries – including intelligence cooperation, counter-hybrid capabilities, crisis response instruments, and coordination with NATO – has become an increasingly salient driver of resilience. A stronger EU security role can limit the effectiveness of coercive and hybrid influence, while weak or ambiguous engagement enlarges the space for external pressure.

The EU's economic model and outreach constitute a further key driver. The scale, speed, and effectiveness with which EU funding instruments (including IPA, NDICI, and enlargement countries' new "facilities") translate into visible outcomes on the ground shape credibility as much as formal accession promises. This interacts directly with the EU's approach to green and digital transitions, industrial policy, regulatory alignment, and economic security. A more open and integrative model supports convergence and resilience; a more selective or protectionist approach risks reinforcing fragmentation and exclusion.

Finally, the prospect of differentiated integration – including staged accession, Single Market access, and gradual or sectoral integration – functions as an important conditioning driver. Such arrangements can either reinforce reform incentives and EU anchoring, or institutionalise ambiguity if not clearly framed.

Taken together, EU political commitment, security posture, internal cohesion, and delivery capacity emerge as high-impact drivers that differentiate futures in which the EU stabilises its neighbourhood from those in which it competes with alternative governance and development models.

The Future of Candidate Countries

A second cluster of drivers concerns domestic trajectories within EU candidate and potential candidate countries themselves. Domestic governance capacity functions as the primary mediating variable between external pressure and actual influence.

Institutional strength, rule-of-law consolidation, elite commitment to reform, and security-sector reform reduce vulnerability to foreign leverage by constraining the effectiveness of coercive, opaque, or transactional influence channels. By contrast, democratic backsliding, state capture, unresolved conflicts, weak administrative capacity, and limited absorption of EU funding create entry points for external actors to shape political outcomes, economic choices, and societal narratives.

The information environment constitutes a critical operational driver within this cluster. Media independence, platform governance, societal trust, and resilience to disinformation strongly condition how external narratives translate into political influence. This is particularly relevant for Russian hybrid strategies, but increasingly also for Chinese and Turkish soft-power instruments.

These domestic trajectories are characterised by medium to high uncertainty and operate as key swing variables across scenarios. Index trends show that small shifts in elite alignment or institutional performance can produce disproportionately large effects on external influence patterns. Domestic politics therefore do not operate in isolation, but interact continuously with both EU engagement and the strategic behaviour of external actors.

Candidate countries are thus neither passive recipients of influence nor fully autonomous agents. Their future positioning depends on how domestic capacity evolves under varying conditions of EU credibility, security provision, and international competition.

The Future of External Actors: Russia, China, and Turkey

A third cluster of drivers concerns the strategic posture, instruments, and constraints of the three external actors examined in this paper. While all three project influence across the region, their trajectories differ markedly in terms of volatility, embeddedness, and dependence on external conditions.

China's strategic posture in the region is characterised by a broadly incremental and adaptive approach, centred on investment, connectivity initiatives, and selective institutional engagement. The scale and pace with which these instruments are deployed depend on external conditions such as global supply-chain reconfiguration, EU investment screening, and the evolution of industrial and trade policy. As a result, China's ambitions and engagement tend to vary more in speed and scope than in direction, while their translation into effective influence remains contingent on domestic and European constraints.

Turkey's regional posture is shaped by socially embedded and path-dependent instruments, including cultural proximity, diaspora networks, education links, and pragmatic sectoral cooperation. The sustainability and strategic weight of these instruments depend on Turkey's domestic political and economic stabilisation and on the broader EU-Turkey relationship. Across scenarios, Ankara's engagement efforts tend to persist, but their ability to generate durable influence varies with local receptiveness and competing anchors.

Russia's strategic posture is the most volatile and capacity-constrained. Beyond war dynamics, sanctions regimes and energy decoupling constitute distinct drivers shaping Moscow's fiscal resources, elite networks, and ability to sustain external engagement. The outcome of the war in Ukraine represents a critical uncertainty that may amplify or constrain Russia's ambitions and tools, but does not function as a structural driver of influence in itself. Moreover, because the Index measures external influence rather than coercive control or imposed dominance, it cannot anticipate outcomes such as force-based political subordination or territorial annexation. Such outcomes are therefore treated as potential wild cards within the scenario framework rather than as extensions of projected trends.

The Future of the International System

The final cluster of drivers concerns the wider international environment in which candidate countries and external actors operate. The configuration of the international system acts as a multiplier of influence, shaping whether competition unfolds within rules-based constraints or through coercive and transactional practices.

United States engagement and transatlantic cohesion remain central in sustaining deterrence, security guarantees, and multilateral norms. U.S. engagement does not mechanically determine the outcome of conflicts such as the war in Ukraine. However, it materially shapes the strategic conditions under which such outcomes become more or less likely, by influencing deterrence, escalation management, alliance cohesion, and the permissiveness of the international environment.

The regional security architecture – including NATO posture and ad hoc coalitions – constitutes an additional driver influencing how security risks translate into political leverage and external influence.

More broadly, the evolution of the global trading system, the use of tariffs and sanctions and geoeconomic instruments, and the erosion or reinforcement of multilateral institutions condition whether candidate countries integrate into cooperative frameworks or face fragmentation and exclusion. These systemic drivers exhibit high uncertainty and interact closely with both EU choices and the strategic behaviour of Russia, China, and Turkey.

Table 2. Core Drivers, Mechanisms, and Use in Scenarios

	Core Drivers	What They Shape (Mechanism)	Used in Scenarios as...
3.1 European Union	<ul style="list-style-type: none"> • Enlargement credibility and political commitment • EU security and defence engagement (hybrid, intelligence, NATO coordination) • EU funding and delivery capacity (IPA, NDICI, EU Facilities) • Economic model (green/digital transition, economic security) • Differentiated / gradual integration 	Sets reform incentives and strategic anchoring; constrains or expands room for third-country leverage	Primary resilience anchor (Resilient Europe); weakened constraint (Great-Power Chessboard); partial anchor (Strategic Tug-of-War)
3.2 Candidate Countries	<ul style="list-style-type: none"> • Governance capacity and rule of law • Elite alignment vs. state capture • Unresolved conflicts and security-sector reform 	Mediates how external pressure translates into actual influence; key swing variables	Explains divergent national paths within each scenario; source of

	<ul style="list-style-type: none"> • Administrative capacity and absorption of EU funds • Information environment (media freedom, disinformation resilience) 		internal variation
3.3 External Actors (Russia, China, Turkey)	<ul style="list-style-type: none"> • China: investment, connectivity, supply chains, EU screening • Turkey: social embeddedness, diaspora, pragmatic cooperation • Russia: sanctions regimes, energy decoupling, fiscal capacity • War in Ukraine as critical uncertainty / wild card 	Shapes ambitions, tools, and capacity of external actors (not outcomes per se)	Determines intensity and modality of external engagement under different conditions
3.4 International System	<ul style="list-style-type: none"> • U.S. engagement and transatlantic cohesion • Sanctions and geoeconomic statecraft • Global trading order • Regional security architecture (NATO, ad hoc coalitions) 	Multiplies or constrains influence by shaping the strategic environment	Defines rules-based vs coercive context across all scenarios

4 Structural Axes and Scenario Space for 2035

The range of plausible futures for external influence in EU candidate countries is structured by two overarching strategic axes derived from the interaction of the key drivers identified in the previous section. These axes do not introduce new variables; rather, they aggregate and recombine domestic, European, and systemic drivers into a simplified analytical space that captures the fundamental sources of divergence across future trajectories.

In doing so, the axes translate the four driver clusters discussed in Section 3 – the future of the EU, the future of candidate countries, the posture of external actors, and the evolution of the international system – into higher-order patterns of exposure and resilience. They also provide the conceptual bridge between the empirical baseline offered by the InvigoratEU External Influence Index and the forward-looking logic of scenario construction. Together, they delineate the strategic conditions under which China, Russia, and Turkey may expand, adapt, or see their influence constrained, and the extent to which candidate states are able to absorb, resist, or channel such influence.

Axis 1: EU Anchoring and Domestic Alignment vs. Strategic Ambiguity

The first axis captures variation in the strength and coherence of European anchoring in

enlargement countries, understood as the combined outcome of EU engagement and domestic alignment within candidate states. It reflects not only the openness and credibility of the EU enlargement process, but also the capacity and willingness of candidate countries to internalise, sustain, and operationalise that anchoring through reforms, institutional consolidation, and strategic choices.

At one end of the axis lies a future characterised by strong EU anchoring and domestic alignment. In this configuration, the EU maintains credible enlargement momentum through consistent conditionality, material support, security and defence engagement, and gradual integration into key EU frameworks, including the Single Market and green and digital transitions. At the same time, candidate countries display sufficient governance capacity, elite commitment, administrative absorption, and societal resilience to translate EU engagement into durable institutional change. Under these conditions, incentives for reform are reinforced, policy convergence deepens, and the scope for external actors to exploit vulnerabilities narrows.

At the opposite end of the axis lies a condition of strategic ambiguity, resulting from a combination of uneven EU engagement and weak or inconsistent domestic alignment. This may stem from EU-side constraints – such as political contestation, enlargement fatigue, budgetary limits, or a more selective and security-driven approach to integration – but also from domestic factors, including democratic backsliding, state capture, unresolved conflicts, or limited administrative and societal capacity in candidate countries. In such settings, EU anchoring becomes partial or contested, reform incentives weaken, and candidate states face stronger pressures to hedge, diversify partnerships, or engage in transactional balancing. External actors find greater room to cultivate leverage through economic dependencies, political ties, or information influence.

Importantly, this axis allows for asymmetries across policy domains and countries. EU anchoring may remain strong in economic or connectivity terms while weakening politically or normatively, or vice versa. Likewise, domestic alignment may advance in some candidate states while stagnating or reversing in others, producing differentiated integration pathways and a multi-speed enlargement. The axis therefore reflects the interaction between EU choices and domestic trajectories, rather than attributing outcomes to either side alone.

Axis 2: Rule-Based Order vs. “Might-Makes-Right” Geopolitics

The second axis captures the evolution of the wider international environment in which EU enlargement countries and external actors operate. It ranges from a rules-based, cooperative international order to a coercive and transactional international system defined by power competition and weakened normative constraints. This axis conditions not only the permissiveness of the international environment, but also the scope, ambition, and effectiveness of external actors’ engagement strategies.

At one end of the axis lies an international context characterised by sustained U.S. engagement, transatlantic cohesion, effective deterrence, and the continued relevance of multilateral institutions and international rules. In such an environment, security guarantees

are more credible, hybrid interference is more constrained, and democratic governance retains normative appeal. These conditions narrow the operational space for Russia, China, and Turkey by increasing the costs of coercive leverage, opaque economic practices, and norm-contesting narratives. This setting reinforces EU policy coherence and limits the ability of Russia, China, and Turkey to instrumentalise instability or challenge European influence through coercive means.

At the opposite pole lies a multipolar competitive order characterised by coercive leverage and strategic hedging. Here, authoritarian or transactional governance models gain traction, hybrid tactics intensify, and global governance erodes. In this environment, external actors face fewer constraints in translating ambition into influence: Russia relies more heavily on coercive, security-based and energy-linked leverage; China expands connectivity, investment, and supply-chain integration with weaker normative constraints; and Turkey capitalises on pragmatic, security-driven and socially embedded channels. The erosion of rules and enforcement mechanisms lowers the costs of coercion and transactional bargaining, amplifying zero-sum dynamics and increasing pressure on smaller states to accommodate competing demands and extract short-term benefits.

Crucially, while this axis captures structural features of the international system, the war in Ukraine is treated as a potential wild card rather than an axis-defining variable. Its evolution may amplify or redirect trajectories along this axis, but does not determine its endpoints. The axis remains anchored in the broader configuration of the international order – including the distribution of coercive capacity, the strength of multilateral institutions, and the balance between power-based and rules-based interaction – which conditions how external actors translate ambition into influence.

Scenario Space and the Logic of Interaction

Crossing the two structural axes generates a four-quadrant analytical space that serves to map the full range of plausible configurations shaping external influence in EU enlargement countries. However, the scenario exercise deliberately develops three ideal-type scenarios rather than four mechanically derived quadrants, in order to maximise analytical clarity and policy relevance.

Two scenarios correspond to clear directional shifts away from present dynamics. At one pole, Resilient Europe reflects a future in which strong EU anchoring and domestic alignment coincide with a rules-based international order, producing a consolidated neighbourhood in which reform incentives are reinforced and the scope for external influence is structurally constrained. At the opposite pole, Great-Power Chessboard captures a trajectory of deterioration, where strategic ambiguity in EU anchoring combines with a coercive and contested international environment, enabling external actors to expand leverage and pushing candidate countries toward hedging, dependency, or drift.

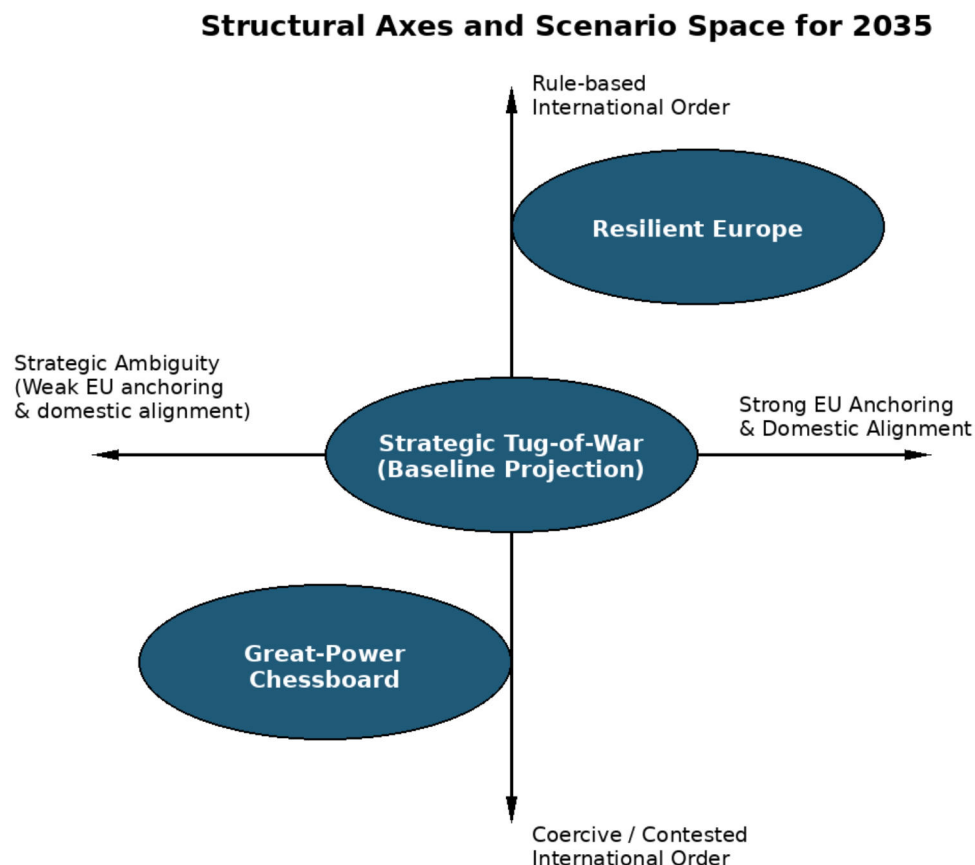
The third scenario, Strategic Tug-of-War, is explicitly conceptualised as a forward projection of the current status quo, rather than as a residual or hybrid quadrant. It occupies the central space of the matrix and reflects the continuation – and gradual intensification – of today's mixed conditions: partial and uneven EU anchoring, differentiated domestic

alignment across candidate countries, and an international system characterised by persistent rivalry without full systemic breakdown. In this scenario, rule-based and transactional logics coexist, external actors compete through parallel channels, and influence neither collapses nor decisively consolidates.

This design choice acknowledges that present dynamics already combine elements associated with multiple quadrants, and that projecting them forward as a distinct baseline scenario provides greater analytical precision than artificially separating them into mutually exclusive categories. The four-quadrant matrix thus functions as a structuring device, while the three scenarios represent coherent, internally consistent trajectories: two marking clear departures from the present, and one extending existing trends under conditions of sustained uncertainty.

Read in conjunction with Figure 2, the scenario space should therefore be understood as centred on a baseline trajectory (Strategic Tug-of-War), flanked by two alternative futures that emerge if the balance between EU anchoring, domestic alignment, and the international order shifts decisively by 2035.

Figure 2 Structural Axes and Scenario Space for External Influence in EU Enlargement Countries (2035)



The figure maps three ideal-type scenarios within a two-axis analytical space defined by (i) the degree of EU anchoring and domestic alignment in candidate countries and (ii) the

nature of the international order, ranging from rules-based cooperation to coercive geopolitics. Resilient Europe and Great-Power Chessboard represent divergent trajectories away from current dynamics, while Strategic Tug-of-War is conceptualised as a forward projection of the present mixed configuration, characterised by partial EU anchoring and sustained international rivalry. The four-quadrant matrix functions as a structuring device, while the scenarios represent coherent and policy-relevant future trajectories rather than mechanically derived quadrants.

5 Scenario Narratives to 2035

The scenario space translates the analytical drivers identified in Section 3 and the structural axes introduced in Section 4 into three plausible future scenarios on how external influence may evolve in EU candidate states. These narratives are not forecasts; rather, they illustrate distinct but plausible futures, grounded in the trend projections of the InvigoratEU Index and structured around uncertainty ranges and geopolitical contingencies. Each scenario articulates the interaction between domestic reforms, EU strategy, and the strategic behaviour of China, Russia, and Turkey, as well as the broader international order. Together, they support forward-looking reflection on how to reinforce resilience and anticipate external challenges.

While the war in Ukraine constitutes a critical contextual factor across all scenarios, its role differs markedly. It acts as a central amplifier of power- and leverage-driven international competition in the Great-Power Chessboard scenario, while functioning primarily as a stress test for EU credibility and resilience in the Resilient Europe scenario. Accordingly, the evolution of the war is treated not as a deterministic driver, but as a potential wild card whose effects depend on the broader configuration of EU engagement and the international environment.

Scenario A – Great-Power Chessboard

By 2035, the Western Balkans and Eastern Trio are shaped by open strategic confrontation. In this scenario, the war in Ukraine acts as a powerful amplifier of power-driven international competition, accelerating trends already embedded in a fragmented and coercive global environment. The war in Ukraine evolves toward an outcome that consolidates Russian leverage and signals the continued effectiveness of coercive power in shaping regional order. The United States remains engaged but increasingly selective, prioritising the Indo-Pacific. Within the EU, fragmentation and political fatigue limit external coordination. The result is a competitive landscape in which external actors expand their reach while the EU struggles to uphold credibility.

Enlargement enters 2035 with a structural trust deficit. No country has joined the EU since 2013, and the accession process entirely loses its transformative power. Conditionality remains on paper but no longer shapes political behaviour. Reforms become transactional, timelines blur and domestic elites adjust to a setting where EU alignment is one option, not the defining horizon. Gradual integration instruments, including early access to the Single Market or sectoral participation, remain largely unavailable or politically hollow, further

weakening the EU's capacity to anchor reforms. The turning point comes from Ukraine: an externally constrained settlement leaves the country formally sovereign but strategically subordinated, excluded from the EU track and open to reconstruction largely shaped by Russia and China. Moldova accelerates toward EU out of fear; Georgia and Serbia deepen pragmatic coordination with Moscow; Bosnia and Herzegovina polarises; Montenegro, North Macedonia and Albania remain Euro-Atlantic countries but increasingly explore alternatives; Kosovo stays firmly Western but vulnerable to hybrid pressure.

Turkey becomes the most consistently engaged external actor. A decade of domestic stability enables Ankara to sustain reliable diplomacy, targeted investment and security cooperation. Albania and Kosovo deepen ties across defence, education and culture. Bosnia and Herzegovina sees Turkey as a stabilising partner. Montenegro and North Macedonia broaden economic and energy cooperation. Serbia maintains cautious but functional channels in logistics and manufacturing. In Georgia, Black Sea connectivity drives a special partnership. Moldova remains guarded except in Gagauzia, where cultural diplomacy keeps a symbolic bridge. By 2035, Turkish influence is institutionally embedded and socially anchored.

Russia re-enters the region with narrower but potent tools. In a more permissive international environment, partial sanctions erosion and renewed energy revenues revive limited state capacity. Moscow focuses on receptive elites and identity-driven networks. Serbia and Georgia deepen political-security channels, Republika Srpska becomes a consolidated outpost, and Russian narratives maintain influence in parts of Montenegro and North Macedonia. Moldova oscillates between fear and residual affinity. Albania and Kosovo remain resistant to Russian influence.

China leverages supply-chain realignments, US retrenchment and EU fatigue to expand footholds. Serbia becomes Beijing's regional hub, hosting industrial corridors, digital systems and youth-political programmes. Republika Srpska intensifies cooperation with China. Montenegro remains moderately exposed. Georgia balances Europe, Turkey and China around transport corridors. Elsewhere, Chinese presence stays modest due to EU and NATO alignment. The erosion of the global trading order, combined with selective decoupling and competing trade blocs, further lowers the costs of transactional economic engagement and reinforces zero-sum competition.

The region enters 2035 practising sovereignty through diversification. States keep Europe as an anchor but no longer rely on it alone; they balance external ties, optimise opportunities and hedge risks in an open geopolitical marketplace. Influence is contested, alignment is conditional and power is distributed across multiple poles. In this world, countries navigate the future not by choosing a side, but by learning to diversify.

Scenario B – Resilient Europe

By 2035, the Western Balkans and Eastern Trio operate in a re-Europeanised strategic environment. Competition among external actors persists, yet the desired direction has shifted decisively toward the EU. Enlargement regains momentum, and several countries complete accession while others advance through late-stage negotiations, reflecting the

EU's renewed capacity to integrate new members. Serbia and Ukraine advance through late-stage negotiations, while Georgia reopens structured cooperation. The EU, strengthened by defence integration, a rapid energy transition and renewed internal cohesion, reasserts strategic and normative primacy.

In this scenario, the regional trajectory is not defined by the outcome of the war itself, but by the EU's capacity to sustain credible engagement and absorb prolonged geopolitical stress. The war in Ukraine evolves without producing a decisive victory, leaving Russia territorially entrenched in parts of Ukraine but economically exhausted, politically unstable and institutionally weakened by prolonged war pressures, sanctions, and internal strain. For years, internal power struggles and the pressures of a war economy restrict Moscow's external reach. Influence networks persist in Serbia, Georgia and Republika Srpska, but with declining ambition. Elsewhere, Russian presence becomes residual.

The EU's consolidation changes the regional calculus. A strong defence pillar within NATO, combined with large investments in energy resilience and critical infrastructure, reinforces the Union's strategic profile. The green transition permanently reduces dependence on Russian hydrocarbons and boosts competitiveness. The EU becomes more credible: reforms in candidate states receive increased funding, administrative embedding deepens and political alignment tightens. Crucially, the EU operationalises gradual integration through early and expanded access to the Single Market, EU programmes, and regulatory frameworks, reinforcing reform incentives well before full accession. Improved administrative capacity and absorption of EU funds become a key differentiator among candidate states, accelerating convergence where institutions are capable and exposing bottlenecks where governance remains weak. Domestic turbulence does not disappear, but the overall trajectory leans clearly toward Brussels.

China adjusts to this environment. Fragmentation in the global order slows down but does not disappear, prompting Beijing to pursue a more cautious and selective approach. Its role in the region becomes pragmatic, focused on green infrastructure, renewable energy and targeted technology cooperation. Serbia remains its main partner, though under tighter EU oversight and regulatory convergence. Influence in Bosnia and Herzegovina and Montenegro continues at modest levels. Albania, North Macedonia, Kosovo and Moldova leave minimal space for Chinese initiatives. Georgia and Ukraine maintain limited cooperation shaped by infrastructure needs and political caution.

Turkey's presence narrows but persists. Domestic volatility in the late 2020s reduces Ankara's external ambitions. Influence endures where historical, cultural and security ties are strongest: in Albania, Kosovo and Bosnia and Herzegovina. Cooperation continues in construction, commerce and policing, but geopolitical weight wanes relative to the EU's stronger anchor. In Montenegro and North Macedonia, Turkey retains visibility without strategic leverage. In Serbia, pragmatic coordination continues but diminishes as EU accession intensifies. In Georgia and Ukraine, Turkish outreach becomes complementary rather than central.

Across the region, democratic standards improve, though unevenly. EU frameworks press hardest in the four new member states (Albania, Montenegro, North Macedonia and Moldova). Serbia and Georgia progress more slowly, while Bosnia and Herzegovina and Kosovo remain fragile but anchored in European security structures. Public attitudes shift

accordingly: Russia loses appeal, China is seen as a useful but peripheral partner, and Turkey remains culturally close but politically distant. The EU regains both relevance and attraction.

By 2035, external competition still exists but no longer dictates strategic choices. EU institutions, markets and security guarantees shape most incentives, anchoring reforms and stabilising expectations across the region. Europe does not dominate by default; it prevails because it offers clearer pathways, stronger protection and more predictable gains. The neighbourhood gravitates toward the Union because the EU has learned, once again, to deliver.

Scenario C – Strategic Tug-of-War (Baseline)

By 2035, the Western Balkans and Eastern Trio inhabit a world of managed competition. The international system remains fragmented, not anarchic but not sufficiently rule-based to reduce uncertainty. US engagement continues with variable intensity. The EU deepens in some sectors but is still often politically divided. China remains pragmatic, Turkey active and Russia a constrained spoiler. None of these forces dominates, but they all remain relevant.

Enlargement resumes but gradually. Albania and Montenegro have joined, while North Macedonia and Moldova advance toward accession in the late 2030s. Serbia oscillates. Ukraine and Georgia progress unevenly under security pressures and internal politics. Bosnia and Herzegovina stays stuck in the governance deadlock, and Kosovo advances institutionally without full political settlement with Serbia. Gradual integration and selective access to EU markets and programmes provide partial anchoring, but fall short of restoring the full transformative leverage associated with credible accession. The EU regains importance relative to the stagnation of the previous decade (2013–2022) but does not recover the transformative leverage of earlier periods.

Turkey strengthens its footprint through steady engagement rather than dramatic shifts. Kosovo becomes its closest partner, followed by Albania. Bosnia and Herzegovina maintains wide political and cultural cooperation. North Macedonia and Montenegro continue pragmatic platforms in defence and commerce. Serbia manages a functional, cautious partnership. Georgia and Ukraine engage Ankara on Black Sea security, while Moldova interacts mainly through cultural ties in Gagauzia. Turkish influence becomes a durable feature of the regional landscape.

China advances through targeted, selective expansion. Serbia remains its central platform, with deep industrial, political and digital ties. Georgia and Ukraine maintain strategic channels driven by infrastructure and technology needs. Republika Srpska stays an important node; Montenegro maintains moderate exposure. Elsewhere, Chinese influence remains limited due to strong EU and NATO alignment.

Russia remains weakened but not irrelevant. A prolonged and unresolved conflict environment leaves Moscow under sanctions, economically strained and partly dependent on China, yet still capable of selective interference. It remains influential in Serbia and

Georgia and intermittently active in Republika Srpska. Its presence declines elsewhere as capacity diminishes and Western resilience grows. Russian narratives continue to resonate culturally in segments of society but hold less strategic weight. Across the region, contested information environments and uneven resilience to disinformation shape public perceptions and periodically amplify external influence, without fully overturning strategic orientations.

Domestic politics across the region remain mixed. Some states strengthen institutions and governance; others cycle through reform and regression. Civil society grows in some places but stagnates in others. Demographic decline and emigration remain structural challenges. Economically, EU entrants gain predictable access and investment, while other countries continue multi-vector balancing to secure financing and infrastructure.

Public opinion reflects this pluralism: the EU is the main anchor, China a source of development, Russia a fading but still meaningful identity reference, and Turkey a familiar partner. Exclusive alignment is rare.

By 2035, the Western Balkans and Eastern Trio operate in a hybrid equilibrium: no actor dominates, none of them disappears since all remain in play. Influence is negotiated, layered and conditional. Leaders balance relations adjusting to shifting pressures and preserve strategic flexibility in a plural environment. This is a world where alignment is rarely exclusive and where resilience depends less on choosing a pole than on learning to manage the complex environment.

6 Interpreting the Scenarios: Strategic Insights and Implications

The scenarios developed in this paper do not predict the future. They offer structured ways to think about how external influence may evolve across the Western Balkans and the Eastern Trio depending on the interaction between domestic governance trajectories, European choices, and the wider international environment. Taken together with the empirical evidence from the InvigoratEU External Influence Index and the dedicated reports on Russia, China, and Turkey, they help clarify what is structural, what is contingent, and where policy can still shape outcomes.

A first insight, already evident in the Index analysis and reinforced by the scenario exercise, is that external influence in the region is rooted less in formal alignments than in informal networks, narratives, and societal perceptions. The Index shows that no candidate country displayed high overall influence of Russia, China, or Turkey in 2023, and that societal penetration is systematically stronger than political or economic channels of influence. External actors have made the greatest gains where local institutions are fragile, information ecosystems polarised, and public expectations unmet. This is the arena where competition is most fluid and where the EU has historically been at its weakest.

A second insight is that the EU remains the central gravitational force across all futures, even in the most adverse scenario. In Scenario A (Great-Power Chessboard), states diversify out of necessity, but they do not realign away from the EU. In Scenario C (Strategic Tug-of-War), the EU anchors regional trajectories even as competition intensifies around it. Scenario B (Resilient Europe) makes this dynamic explicit: when the EU delivers consistently,

most external influence – especially from Russia – recedes sharply. Across the scenario space, the EU is never absent, it is either decisive or insufficient.

A third insight concerns Russia's unique volatility. The *Long Policy Report on Russia's Ambitions and Leverage Russia*,⁵ based on the index, shows that Russian leverage is structurally discontinuous, shaped not by long-term soft-power trends but by coercive tools, conflict dynamics, and geopolitical rupture. This explains why Russia is the only actor for which the analysis identifies a very high degree of directional uncertainty, reflecting the potential for sharp divergence across scenarios rather than variations in trend intensity alone. A forced settlement in Ukraine produces a completely different strategic reality from a negotiated stalemate or a prolonged military impasse. Trend extrapolation can describe influence under stable conditions, but cannot capture the consequences of coercive breakpoints – precisely the scenarios where Russia has historically reshaped the regional environment.

China's trajectory is different. The report on *Chinese Influence In The Eastern Trio And The Western Balkans*,⁶ identifies a consistent, upward – but highly selective – pattern of engagement, driven by investment, connectivity diplomacy, and institutional partnerships. The scenarios confirm this: China expands most rapidly when the EU hesitates, moderates when EU conditionality and regulatory alignment strengthen, and stabilises at modest levels when candidate countries tighten governance safeguards. China is structurally present in the region, but speed-sensitive.

Turkey, by contrast, shows resilience and continuity. As the *Long Policy Report on Turkey's Ambitions and Leverage*⁷ highlights, Ankara's influence is anchored in cultural proximity, diaspora networks, education, religion, and long-standing political and security ties. As a result, Turkey remains embedded across all scenarios. Its strategic bandwidth fluctuates, but its social and political presence endures. This makes Turkey a structural actor in the region, not an episodic competitor.

Across all scenarios, however, domestic governance emerges as the most important variable – and the one most directly influenced by EU policy. Weak institutions, corruption, fragmented media environments and unresolved disputes are the most durable entry points for external leverage. This is true for Russia's hybrid networks, China's opaque financing channels, and Turkey's political and religious outreach alike. Conversely, rule of law, administrative capacity, independent media, and civil-society strength are the most reliable long-term stabilisers. The three Index reports converge on the same conclusion: governance is the most important anchor of resilience.

For the EU, the implications are clear. What matters most is not matching Russia's coercion, China's investment scale, or Turkey's cultural proximity, but outperforming these actors where the Union holds structural advantages: credibility, institutional depth, regulatory power, societal mobility, and the transformative potential of accession. The three scenarios

⁵ Marko Todorovi: Long Policy Report on Russia's Ambitions and Leverage, May 2025, <https://zenodo.org/records/17338235>

⁶ Matteo Bonomi: Chinese Influence In The Eastern Trio And The Western Balkans: Strategic Fragmentation In The EU's Enlargement Countries, August 2025, <https://zenodo.org/records/17338857>.

⁷ Marko Todorovi: Long Policy Report on Turkey's Ambitions and Leverage, September 2025, <https://zenodo.org/records/17339529>.

show the alternative outcomes: Scenario A, what happens when these strengths weaken; Scenario C, the ambivalent reality that emerges when they are only partially deployed; and Scenario B, what is feasible when they are used consistently.

This leads directly to the need for a more deliberate European strategy. Credibility must be restored through clearer timelines, staged integration, and incentives that match political commitments. Governance reforms require political will and enforcement, not just technical assistance. Economic engagement must become faster, more visible, and more responsive to local needs. Societal presence must expand well beyond elite channels to match the breadth of Turkish outreach and respond to the social narratives targeted by Russian and Chinese actors. The information environment must be treated as a strategic domain. Conflict management must be proactive, continuous, and insulated from external manipulation. All this requires more than funds; it requires political attention and long-term consistency.

In essence, the foresight exercise shows three different futures: one shaped by coercive competition and fragmented governance, one anchored by credible EU delivery, and one defined by the management of competing pulls in a partially constrained international environment. The difference between them does not lie in the behaviour of Russia, China, or Turkey. It lies in the EU's own willingness to act early, remain present, and follow through. External actors tend to expand precisely in the gaps left by European ambiguity, while they retreat when those gaps close.

7 Conclusions and Recommendations

The foresight exercise shows that external influence in the Western Balkans and Eastern Trio is shaped less by geopolitical determinism than by a combination of domestic governance, EU credibility, and shifting global dynamics, including the evolution of the international environment from more rules-based to more coercive configurations. Russia's trajectory remains volatile and discontinuous, China's influence grows selectively through economic and technological channels, and Turkey's societal and cultural embeddedness ensures a structurally durable presence whose strategic weight varies across scenarios. The EU remains the central gravitational force, yet its impact depends on whether it provides consistent rules, credible progress, and visible delivery.

Across all three scenarios, one message is clear: vulnerability is not inevitable, since it is produced where governance is weak and where the EU hesitates. Strengthening resilience therefore requires tailored action from the EU, national governments, civil society, business actors, and regional bodies. Recommendations on how to better prepare for different possible futures are organised below according to these main groups of stakeholders.

For the European Union:

- **Rebuild the credibility of enlargement:** Signals must be stable, clear and politically backed. A predictable and merit-based accession process narrows the space for hedging.

- **Scale up and accelerate MFF-linked pre-accession funding:** Faster, more visible and more predictable disbursement under IPA, NDICI, and the Pre-Enlargement Facility increases EU presence and reduces reliance on finance tied to strategic strings.
- **Deepen access to the Single Market:** Sector-by-sector integration – energy, digital, transport, industrial goods, and services – should deliver early economic gains, anchor candidate countries more firmly in EU regulatory space, and lock in reform incentives well before accession.
- **Strengthen governance and rule-of-law instruments:** Governance and rule-of-law reforms should be supported as core long-term resilience measures, while conditionality and enforcement tools should be more explicitly mobilised to counter foreign interference. This requires tying EU support to measurable outcomes and targeting state capture, opaque financing, and political interference by Russia, China, Turkey or other countries.
- **Extend the EU's economic-security toolbox to candidate states:** FDI screening, critical-infrastructure protection, subsidy control and cyber resilience should be aligned with EU standards since early pre-accession phase.
- **Increase societal engagement and local presence:** Support for youth mobility, culture, civil society, public diplomacy and independent media strengthens resilience in the societal and informational domains where external influence remains most persistent across all scenarios, countering narrative-based interference and reinforcing long-term societal alignment even when formal political leverage is limited.
- **Reinforce conflict-management engagement:** Sustained EU leadership in the Belgrade-Pristina dialogue, Bosnia and Herzegovina and Moldova limits the scope for destabilising interference in increasingly competitive international environments.

For National Governments in Candidate States:

- **Prioritise governance reform as a security imperative:** Rule of law, administrative capacity, procurement transparency and independent oversight are among the main channels through which Russia, China and Turkey exert influence.
- **Reduce exposure to opaque financing:** Transparent procurement, debt safeguards and stronger regulatory oversight reduce vulnerability to politically motivated projects.
- **Speed up energy diversification and strengthen infrastructure resilience:** Lower the dependence on Russian hydrocarbons and increase compatibility with EU energy and connectivity standards.
- **Build economic and institutional alignment early:** Adopting EU rules ahead of accession reduces regulatory ambiguity, anchors investment expectations, and narrows the scope for external actors to exploit governance gaps and exert economic leverage
- **Treat societal resilience as a core state function:** Support independent media, invest in education and digital literacy, and strengthen strategic communication in local languages.

For Civil Society and Local Stakeholders:

- **Push for accountability and reform continuity:** Civil society should monitor governance, expose corruption and keep enlargement credible by demanding implementation, not just formal compliance.
- **Strengthen public understanding of geopolitical risks:** Local civil society actors can counter disinformation, highlight the costs of external dependency and reinforce democratic norms.
- **Build regional networks for societal resilience:** Cross-border partnerships among NGOs, journalists, youth groups and academics help resist polarisation and reduce vulnerability to external narratives.
- **Enhance economic and community-level linkages:** Local business associations, municipalities and universities can foster practical cooperation that complements EU-level initiatives and strengthens local resilience regardless of external competition.

About InvigoratEU

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

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

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



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

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

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