

Working paper



D5.5: Pathways to the East, Pathways to the West: Four Scenarios of Eastern Europe in 2035



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WORKING PAPER

Pathways to the East, Pathways to the West: Four Scenarios of Eastern Europe in 2035

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SUMMARY

This paper examines geopolitical futures of Eastern Europe through four exploratory scenarios. The analysis centers on the dominant political cleavage shaping the region: the struggle between pro-democracy movements and various forms of authoritarianism, intertwined with geopolitical alignments between Russia/China and the West, conceived as the competition between open and closed societies at both domestic and international levels. The four ideal-type scenarios—Going West, Going East, Wavering, and Resisting—emerge from this juxtaposition of internal regime contestation against external power struggles and outline a potential geopolitical environment that will take shape over the next decade. In conclusion, the paper discusses the implications of these different trajectories for EU policies in the region.



Introduction

This scenario paper aims to outline the contours of the future geopolitical landscape in Eastern Europe. It builds on the premise that the dominant political conflict in Eastern Europe over the past decade (and arguably even longer) has taken the form of a competition between different shades of authoritarianism and pro-democracy movements on the domestic level, and, on the international level, a conflict over geopolitical alignments: Russia and China (the East) versus EU and NATO (the West).¹ While such a (geo)political cleavage manifests differently in various contexts, it is, in general, a dominant feature of the politics in the region, especially in the three countries studied by the RE-ENGAGE project (Ukraine, Georgia, and Moldova). Such a (geo)political cleavage can also be observed in the competition between democratization and the persistence of various forms of hybrid orders, as identified and studied by RE-ENGAGE (Daniel et al. 2024, Machavariani and Bolkvadze 2025, Metodieva 2024, Sterpu, Morari, and Teosa 2025, Strazzari et al. 2024a, Strazzari et al. 2024b).

For heuristic purposes and following a longer tradition of liberal social theory, we label this political cleavage a competition between open and closed societies (Popper 2013; Hayek 2012). While Russia, China, and their regional allies would represent the proponents of the principles of a closed society. On the other hand, the United States and the European Union (or the West at large) have traditionally been associated with liberal democracy and the principles of open societies, namely equality before the law, freedom, and critical reasoning.

Admittedly, this Cold War-inspired reading is now, however, much more complicated than before (Moyn 2023). This is not only because there are numerous open societies beyond the West, but also because the struggle between the principles of open and closed societies has extended from the international level to domestic politics as well. There is a real possibility now that some major open societies may undergo an authoritarian turn, potentially shaking the stability of the world order over the next 10-15 years. Moreover, a similar pattern of rising populism, often accompanied by strong (illiberal) leadership, can be observed in almost all open societies (Nord et al. 2024). However, we believe that these two general labels could be fruitfully used to capture the terms of the main political conflicts in the studied

¹ For a more critical take on a geopolitical reading of regional political conflicts and potential overextension of such a labelling, see Eberle and Daniel 2022, Müller 2018.

countries, as well as the desires of some regional social movements, and the terms of great power competition in the region (Daniel et al. 2024, Machavariani and Bolokvadze 2025, Kroenig 2020, Strazzari et al. 2024).

The four scenarios presented in this paper—Going West, Resistance, Wavering, Going East—follow the above-mentioned logic of a competition between open and closed societies at the level of international and domestic politics. It is the result of a 2x2 matrix (see Figure 1) that juxtaposes internal contestation over the nature and character of a regime against an external struggle between open and closed societies over power and influence in international politics. The fact that we tend to separate domestic and international levels for analytical reasons, of course, does not mean that they are isolated in reality (Hamilton 2019). Quite the contrary, competition between open and closed societies at the international level can profoundly affect a struggle between actors that promote mutually incompatible principles of governance at the domestic level, while the same applies the other way round as well. The goal of this paper is thus to render visible possible development paths, which would then enable discussion of responses tailored to specific geopolitical situations.

		International level	
		<i>Open</i>	<i>Closed</i>
Domestic level	<i>Open</i>	(1) Going West	(2) Resistance
	<i>Closed</i>	(3) Wavering	(4) Going East

Figure 1: Which side prevails in the contest.

The scenarios presented in this paper are exploratory in nature and aim to sketch the contours geopolitical environment over the next decade. Although they should remain within the realm of plausibility, the scenarios outlined on the next pages do not, per se, assess the likelihood of how the future might turn out. Rather, they should make the future more legible by structuring our thinking (Daniel and Ditrych

2024).² While the scenarios follow the logic of the matrix, each outlines its core assumptions about how it will arrive at such a situation and sketches the strategies and interests of the involved actors. By doing so, it provides the general indicators to assess which trajectory seems to be materializing. Moreover, each scenario contains a “Wild Card,” a transformative low-probability, high-impact event that would alter the core logic and trajectory of the scenario. The Wild Cards, as conceived in this paper, are thus supposed to highlight the core assumptions of the respective scenario and how they can unfold differently.

The scenarios were conceived at two online workshops³ with members of the RE-ENGAGE consortium and invited experts from Eastern Europe, whose insights were critical in shaping the scenarios. The workshops took place in April and June 2025⁴. Based on these discussions, desk research, and research conducted throughout the rest of the RE-ENGAGE project (in particular, Daniel et al. 2024, Machavariani and Bolkvadze 2025, Metodieva 2024, Sterpu, Morari, Teosa 2025, Strazzari et al. 2024), we formulated and revised predetermined elements, key driving forces, and critical uncertainties (see Daniel and Ditrych 2024). The basic scenario plotlines and key images of the regional futures, illustrated by the 2x2 matrix, were constructed around these scenario building blocks by the authors of the paper throughout the Summer and Autumn of 2025⁵. Naturally, this presents some limitations to this study, as it reflects the information and data available as of December 2025. The result of the negotiations between Ukraine, Russia, the USA, and the involved European states over the terms of the end of the War in Ukraine thus represents one of the main critical uncertainties, as many specific trajectories of future scenarios revolve around the shape and form of the arrangement.

Four possible outcomes are general images, a sort of Weberian ideal types, that serve the purpose of structuring our thinking about the future (Daniel and Ditrych 2024)

² The process of developing the scenarios was slightly different for Eastern Europe than in the case of scenarios of the Western Balkans (see Metodieva and Daniel 2025). Since the geopolitical situation of the Eastern European countries is different and Russian interests are much more present relatively to interests and capabilities of the other involved actors, we decided to emphasize the conflict between the pro-Russian and pro-European forces much more strongly use the open x closed societies structuring.

³ We thank Anna Jaskina for her logistical and communication support during these workshops.

⁴ Each of the workshops was attended by about 12-15 experts, ranging from academics to think tankers and political advisors. We decided to keep their identities anonymous as we held the discussions under the Chatham House rules.

⁵ We would like to thank in particular Jan Švec, Martin Laryš, and Pelin Ayan Musil for their inputs in this phase.

and that are especially relevant with respect to the region of Eastern Europe. At the same time, they can serve as possible development paths for specific countries within the region—namely, Georgia, Moldova, and Ukraine. Bearing in mind that domestic and regional dynamics, along with specific conditions, may affect individual countries differently, it is entirely possible that some actors (unlike others) will follow a separate trajectory, mirroring an alternative scenario. The future might thus resemble a mixed result combining various development paths.

Scenario Roadmap

The four scenarios combine the agency of individual countries and various domestic actors with global and regional dynamics. The most optimistic scenario—*Going West*—is one in which the principles of open societies prevail not only domestically in relevant countries of Eastern Europe, but also at the level of global politics. This represents a victory of liberal and democratic forces over autocratic tendencies in the politics and society of Moldova, Georgia, and Ukraine, which is further reinforced by a relative decline of Russia and China. A contrasting scenario, *Going East*, is the exact opposite of a liberal, democratic victory. Authoritarian and oligarchic politics prevail over open society principles, both domestically and internationally. In the remaining two scenarios, the domestic and international dynamics are misaligned. While *Wavering* scenario expects a continuous domestic contestation of liberal democratic principles of governance, which prevents a speedy and comprehensive integration with the West despite a gradual decline of authoritarian great powers abroad, *Resistance* scenario counts on a reversed logic of a strong civil society resilience vis-à-vis domestic authoritarian tendencies that are bolstered by a growing relative power of countries like Russia or China.

The scenarios revolve around the main building blocks. During the scenario-building process, we deliberately focused on the main external actors and excluded several other potentially relevant players for the sake of simplicity and coherence. Similarly, we decided to consider the EU as a single actor and point out divergences between the member states and other relevant players only in cases where it is necessary for the logic of the scenario. The elementary dynamics of all four scenarios, together with a residual possibility to move back and forth between individual development paths, rest on three core building blocks that shape the character of alternative futures. These building blocks consist of *predetermined elements*, *driving forces*, and *critical uncertainties*. The *Wild Cards*, stemming from the

specific trajectory of the scenarios, are then introduced within the scenarios themselves.

Predetermined elements

Two factors that can be considered as given at least until the ultimate horizon of the proposed scenarios in 2035 are seen as the so-called *predetermined elements*

- **Continuous contestation of established principles of governance at the domestic level.** This can take on different forms such as the rise of populist or authoritarian leaders (Arato and Cohen 2021; Berman 2021; Baro and Todal Jensen 2025), oligarchic politics and democratic backsliding (Haggard and Kaufman 2021; Grillo et al. 2024), but it can also include protest movements that challenge autocratic leadership (Jones and Newlee 2019; Lo et al. 2021) or civil society mobilization campaigns (Bernhard et al. 2020; Jacobsson and Korolczuk 2020). It is a story of an intensifying and polarizing conflict between proponents of open society principles and those who see the same principles as a threat to their (ascent to) power.
- **Great power competition between open and closed societies at the international level.** This is usually imagined through the lenses of a rivalry between the United States and China (Mazarr 2022; Johnson 2023), but it must also take into account the foreign policy of autocratic Russia (McFaul 2020; Stoner 2023) and a rising populism within the West that can undermine its unity or can even turn some of the main proponents (Spatafora et al. 2025; Cadier and Lequesne 2020).

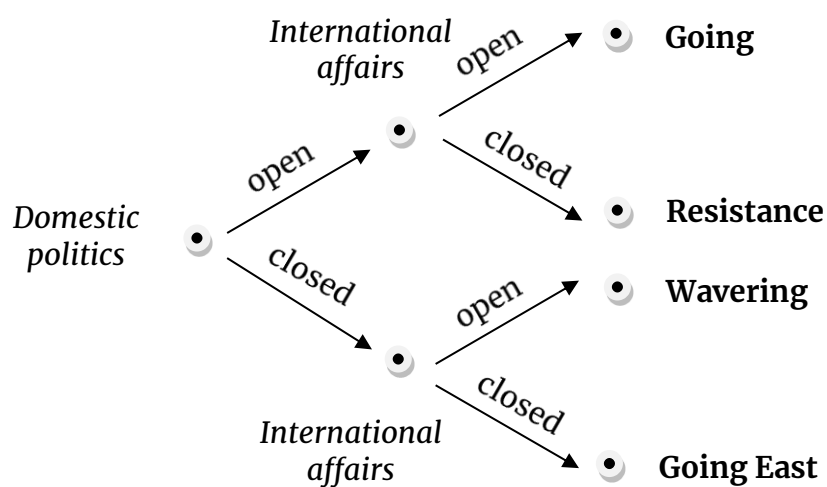


Figure 2: Extended form of the competition between open and closed societies.

Driving Forces

If the predetermined elements provide the basic structure of the scenario analysis, but it is the *driving forces* that navigate actors on their way toward one of the four possible end-states (see Figure 2). They motivate, push, and pull countries, leaders, and other players in their mutual interactions.

- **Populist nationalism** (Jenne 2021; Destradi et al. 2021; Hafner-Burton et al. 2019) as one of these driving forces, for example, largely affects the consensus in transatlantic relations and also the action-readiness of the EU itself. It is not just about being able to effectively help Ukraine in its struggle against the Russian aggressor, but also about offering a viable perspective of integration to countries in the neighbourhood, which can then have the second-order effects on the attractiveness of open society principles and the feasibility of necessary economic and political reforms.
- **Societal polarisation** (Levin et al. 2021; McCoy et al. 2018; Friedrichs and Tama 2022) as another important driver of scenario dynamics that affects the struggle between proponents of open and closed society principles is often fuelled by domestic structural factors like regional economic inequalities or city-countryside cleavages, but it might have important international implications too. One of the most visible manifestations of this trend is an emerging gap between the political elite, often embracing authoritarian principles and the logic of hybrid rule (Strazzari et al. 2024), and civil society actors that fight against democratic backsliding. The linkage between the political elite and society is also the Achilles heel of any autocratic regime, the stability of which depends on manipulating this linkage (see McFaul 2021), and together with a top-dog status-seeking desire (Wigen and Neumann 2018) drives its behaviour.
- **The willingness and ability of the West to integrate the Eastern European countries.** While the discussions about the EU enlargement experienced a significant push with the start of the war in Ukraine, the sustained EU activity in this respect and the ability to maintain internal unity on this issue represent a crucial variable and one of the main driving forces of the following scenarios.

Critical uncertainties

While driving forces serve the purpose of fuelling scenario dynamics, and predetermined elements define the structural relationship between individual outcomes, *critical uncertainties* can supercharge, reverse, or freeze the scenario dynamics by radically reshuffling the relations among key actors or by closing off some development paths.

- **Escalation of a conflict between the United States and China** can be one such event (Rudd 2022), the repercussions of which will be felt also in Eastern Europe because, other things being equal, there won't be much attention left for this part of the world.
- **The change in leadership or regime in Russia** is another example of a transformative contingency (Kolesnikov 2023, Fix and Snegovaya 2024), with a profound impact on neighboring countries and their ability to chart their own course.
- **Sudden domestic developments and other external eventualities** such as a decision-making crisis of the EU due to Franco-German domestic paralysis (Alipour 2025), the US-Russia collusion including the American departure from Europe (Chivvis 2025), major electoral interference undermining a democratic resilience, new interstate conflicts, and severe economic crises (Douthat et al. 2025) affecting a political stability are all possible too. They can bring about changes in dynamics that, together with the driving forces and predetermined elements, jointly construct the path toward the four scenarios presented below.

Scenario 1: Going West

The most optimistic scenario for the three candidate countries from the EU Eastern neighbourhood would be their partial or full integration into the Western institutional structures commonly associated with the EU and/or NATO in particular. There is arguably a long journey ahead for Moldova, Georgia, and Ukraine before they can secure a coherent and undisputable pro-Western domestic orientation and turn their candidacy status to EU membership (Nakashidze 2024). It would require careful management of domestic societal polarisation, taming of oligarchic state capture, and a hybrid nature of the regional regimes, implementation of significant domestic reforms (Konończuk et al. 2017, Strazzari et al. 2024). Furthermore, such a scenario would require a favourable international

context, including an increased EU action-readiness and a Russian domestic crisis, if not paralysis.

At the same time, one must bear in mind that the three countries are in different positions with respect to the prospects of Western integration. Georgia would need to capitalise on its pro-European civil society and pro-European public imaginaries and make a full U-turn regarding ongoing democratic backsliding (Meladze and Asaad 2025) and growing international isolation (Kakachia and Bechná 2025). It will have to bridge the gap between pro-democratic non-governmental civic actors, the population at large, and an increasingly authoritarian elite supported by oligarchic interests (Demytrie 2025, Machavariani and Bolkvadze 2025). This is difficult to imagine without profound domestic reforms, including a transformation of its judiciary (Tsereteli 2022). Rigorous, democratic electoral processes and effective pro-European mobilization campaigns, together with a strong push from the European side aimed at the Georgian population beyond urban centers, form a baseline on which other factors naturally depend. However, this scenario also assumes a more radical push against the authoritarian governmental actors, including potentially a mass popular mobilization.

Moldova also has a deeply polarized society (Koldomasov 2025, Sterpu, Morari and Teosa 2025) and its own problems with oligarchic influence, particularly in relation to democratic reforms (Marandici 2025). Yet, despite the unresolved issue of the separatist Transnistria region, which has a Russian military presence that can potentially put the progress of integration in doubt, the country has a crucial anchor within the EU in the form of close social, cultural, and economic relations with Romania. In the *Going West* scenario, Chişinău maintains its current pro-Western orientation and overcomes regional differences, including a city-countryside cleavage.

The situation of Ukraine is comparatively more volatile compared to that of Georgia and Moldova due to an ongoing conflict with Russia. On the one hand, strong national feelings triggered by the war with Russia (Howlett 2023) can be channelled toward a positive outcome thanks to the prospect of European integration. That, however, depends not only on a continuous implementation of domestic reforms and anti-corruption policies (Razumkov Centre 2025), but also on a plethora of important factors beyond Kyiv's control.

A pro-European and pro-Western foreign policy orientation for Moldova, Georgia, and Ukraine must emerge from a bottom-up movement within the respective

societies, but it cannot be isolated from the international context. The prospect of integration heavily depends on the EU's (and NATO's) ability to turn words into deeds and overcome internal divides in order to facilitate enlargement. Public support for the enlargement can shift relatively rapidly and often depending on external events like the war in Ukraine (Panchuk 2024; Forsberg 2024). It is thus crucial to lock in the possible shifts in public and/or leadership support for enlargement in individual member states in order to build consensus and move from words to deeds, while taking advantage of the gradual integration in the meantime.

A continuous engagement of the United States in Eastern Europe remains indispensable for the prospect of NATO enlargement in particular, but the EU action-readiness and support of reformist and pro-democratic forces in Moldova, Ukraine, and Georgia is a *sine qua non* condition of a sustainable pro-Western orientation in general (see Bechev et al. 2025). An unrelenting America-first foreign policy can even prompt the EU to fill the vacuum in the event of US withdrawal and act on its promise of enlargement, provided domestic conditions in individual member states permit this, of course. However, the trajectory of this scenario assumes a certain level of the US reengagement with the region.

Moscow and its policy *vis-à-vis* its neighbourhood will continue to shape the security environment in Eastern Europe, and the feasibility of the Going West scenario largely depends on the Russian ability to act beyond its own borders. A significant window of opportunity would open up if the domestic political and/or economic situation in Russia worsens substantially. Potential military failures on Ukraine's battlefields, a sharp economic downturn, and an increase in domestic discontent may result in major destabilization of Putin's regime. In the economic realm, Russia has lost tens of billions of USD in export revenues, exacerbated by a drop in oil prices, inflation, sharply reduced household consumption, and drastically decreased business investment. Various factions within the Russian elite could temporarily join forces to engineer a transition of power through a "palace coup," aiming to make Putin a scapegoat for all of Russia's ills and introduce some limited reforms and reduced repression to alleviate domestic discontent.

Under this scenario, Russia would reduce its aggressive actions against Ukraine and neighboring countries, while being willing to conclude a peace treaty with Ukraine that would not resemble the unconditional surrender of the Ukrainian state. The new technocratic, reformist regime would not be democratic, but it would be able to reset relations with the West to some extent (Deen, Drost and Carstens 2023). Concentrating on domestic problems and efforts to improve relations with the

surrounding world, Russia would also limit the willingness and determination of the Russian state to allocate substantial funding for blackmailing, interfering in, and manipulating domestic affairs in Georgia and Moldova — including their election processes — or assisting in rigging elections in favor of pro-Russian incumbents. Strictly implemented and harsh sanctions from the EU and the US can significantly contribute to worsening the situation in Russia (Luck 2025), while any deterioration of conditions in China due to rigid decision-making and authoritarianism will limit Beijing's ability to bail out Moscow. But domestic factors in Russia, including a possible leadership transition or political crisis, will play a crucial role.

If regional countries move towards the West, China will adopt a low-key approach aimed at increasing its leverage through economic ties. Moldova and Ukraine have not established as close a connection with China as Georgia, and the Chinese foreign policy tools of influence (beyond diplomatic ones) are somewhat limited. As there are no huge infrastructural projects, the potential decoupling from Chinese political influence, which is perceived as supporting too closely Putinist Russia, is not a difficult task. Georgia is a different case (see Daniel et al. 2024, Strazzari et al. 2024). However, as the elite co-optation is closely tied to Georgian Dream and Ivanishvili, the fall of Georgian Dream might lead to China losing its established networks. Despite this, the Chinese footprint is already strong, and China will thus continue to exert some level of influence on the following more liberal government. When the three countries embark on EU accession, China seeks to benefit from this, offering substantial and attractive projects, such as the construction of lithium battery factories, or increasing its role in telecommunications and the reconstruction of Ukraine. China attempts to increase its stakes ahead of the countries entering the EU, thereby gaining greater access to EU infrastructure and enhancing its influence across the EU to achieve its foreign policy objectives.

In the *Going West* scenario, Turkey repositions itself as a regional powerbroker, rather than a follower of the EU, seeking to ensure that Brussels is not the sole center of gravity in the Black Sea region. Turkey intensifies its bilateral ties with Ukraine, Georgia and Moldova to avoid marginalization (seeking new infrastructure, energy, and defense deals), and invests more in soft power among Turkic communities (Gagauzia and Crimean Tatars), without necessarily being a spoiler of the regional integration in the European institutions. Ankara will also invest in alternative geopolitical platforms (e.g., Organization of Turkic States or Black Sea cooperation formats) to keep non-EU multilateral options. In the case of a pro-Western, pro-democratic government following the wave of regional democratization, Ankara

would not keep this power-broker position or challenge Brussels, but it would continue to intensify bilateral, primarily economic, relations with these countries.

All in all, the scenario is based on the assumption of a Sino-Russian retreat, EU-US economic and political revitalization, and the ability of local populations in Eastern Europe to overcome internal problems and capitalize on the window of opportunity to gradually integrate into Western institutions. Free and fair elections, judicial and anti-corruption reforms, and diminishing regional differences might serve as good indicators that Ukraine, Georgia, and Moldova would be able to follow the *Going West* path. A severe demographic crisis, sluggish growth, and political instability in Russia or China, combined with Western efforts to develop independent supply chains and curtail the economic leverage of Beijing and Moscow, suggest that 'Going West' becomes an increasingly plausible scenario.

Wild card: The Great Power Competition Gets Hot

There are several difficult-to-predict events that might, of course, derail any progress within this scenario and shift the dynamics toward other development paths. One of such wild cards is a renewal of conflict in Georgia, or a possible political violence in Transnistria (and Ukraine) as a form of Russian response to increased Western engagement. Yet an open conflict in the Indo-Pacific region can have a transformative effect on Western integration of Georgia, Moldova, and Ukraine, too. It is one thing to have a simmering cold war between China and the US, but a hot war over Taiwan would shift the attention of virtually all relevant global actors away from Eastern Europe. The question of enlargement would no longer be an issue, and as the world is hit by an economic crisis, the EU and China turn inwards to focus on their own economic and security affairs. This leads to regional realignment as local elites seek new patrons among regional powers and hedge their allies against Russia.

Scenario 2: Going East

The most pessimistic scenario for Eastern Europe is the one in which closed society principles prevail both domestically and internationally. Increasingly polarized societies, populist nationalism, economic struggles, and structural cleavages together undermine the resilience of civic actors and enable democratic backsliding triggered by the rise of authoritarian leaders who consolidate power across Eastern Europe. The West will gradually decrease its engagement in the region while Russia and China coordinate their efforts to reshape the international order to their

advantage (Korolev 2025). Georgia, Moldova, and Ukraine either drift toward or are pushed into a sphere of influence dominated by Moscow.

At the domestic level, oligarchic state capture and societal polarization curtail open political competition in Eastern Europe (see Grzymala-Busse 2007, Strazzari et al. 2024). A perceived betrayal of the West gives rise to a new generation of populist leaders who pivot towards pragmatic authoritarianism and promote a balanced foreign policy, maintaining good relations with all international actors. Elections continue to exist but gradually lose credibility due to manipulation, rigged procedures, and media control. Civil society actors and independent media face repression, while corruption remains deeply embedded as a mode of governance. Instead of aligning with Western democratic standards, regional states assume more hybrid characteristics, merging formal and informal methods of rule and sharing power with informal authorities and oligarchs (Strazzari et al. 2024, Zielonka and Rupnik 2020).

In Moldova, an increasingly polarized society (Koldomasov 2025), witnesses a series of tight, highly contested elections. An attempted further intensification of relations between Moldova, Romania, and the EU backfires due to disinformation campaigns, political developments in Romania, and lagging progress on the EU side, leading to more Eurosceptic and populist attitudes among the public and a wave of emigration. A combination of domestic disillusionment with unfulfilled Western promises of full integration (see Sterpu, Morari, and Teosa 2025), together with foreign interference, enables pro-Russian parties to gain influence and shift Chişinău's priorities away from the integration path. Transnistria's unresolved status becomes a pretext for Moscow's rising influence and the EU's inability to proceed with enlargement negotiations, thus effectively neutralizing Chişinău's European aspirations. Another attempt at oligarchic state capture (Marandici 2024) proves successful also due to the rapidly changing international context.

The continuation of the war in Ukraine prevents reconstruction, peaceful development, and democratic revival. Kyiv's domestic population becomes increasingly tired of the conflict and frustrated with the lukewarm, dwindling support of the West. This creates fertile ground for populist leaders who promise 'stability' through pragmatic compromise. Grassroots nationalist groups (Howlett 2023) oppose any form of cooperation with Russia, which only further divides the already disillusioned society. A negotiated settlement ultimately brokered by Washington freezes the conflict, leaving parts of eastern Ukraine under Russian control and acquiescing to Moscow's demands as regards foreclosing Kyiv's NATO

membership. The government's legitimacy erodes as corruption resurfaces, economic problems intensify, and external funding declines. Oligarchs accumulate power and promote strong-handed leadership while competing with each other, further eroding the state institutions and cementing the hybrid regime in place (Strazzari et al. 2024).

Georgia is becoming an increasingly authoritarian society, similar to Turkey, and is eager to cooperate with Russia. Elite co-optation completes the authoritarian transition already underway. European criticism of democratic backsliding (Meladze and Asaad 2025) is framed as interference, while Russia and China offer 'respect for sovereignty.' The country becomes a testing ground for hybrid governance models blending oligarchic capitalism with illiberal stability (Zielonka and Rupnik 2020, Strazzari et al 2024). Russian-backed disinformation narratives, significantly enhanced by China, spread easily, portraying Western democracy as chaotic, decadent, and unreliable. Civil society, without tangible support from abroad, continues its anti-authoritarian mobilization, but with limited success.

At the international level, Russia, re-energized by the result of its war with Ukraine, further capitalizes on Western strategic distraction caused by increased tensions in the Indo-Pacific, tensions and distrust in the US-EU relations that never fully recovered from Trump's and Vance's foreign-policy adventurism and attacks on the EU, and Europe's internal paralysis. Moscow takes this opportunity to solidify and expand its suzerainty (see Wigen and Neumann 2018) in the immediate neighborhood, including Moldova, Georgia, and Ukraine. Russian influence manifests not only through coercion and military threats but also through Europe-wide information operations and post-conflict remodelling of energy dependency.

Despite incurring massive losses for only modest territorial gains, Putin proclaims victory in the "struggle against the collective West," securing a significant surge in domestic support as well as greater approval across the Global South. Russia further consolidates cooperation among revisionist authoritarian regimes in Eurasia, united by their ambition to challenge Western dominance. Although strategic and economic ties between Russia and China deepen considerably, the Kremlin retains sufficient leverage to avoid excessive dependence on Beijing and is able to strike new deals with European private actors as the enforcement of the sanctions regime fell apart (Deen, Drost & Carstens 2023). This geopolitical situation would likely lead Putin to view an escalation of confrontation with the West and pro-Western neighboring states as a unique opportunity to fulfill his historical mission of restoring the Russian empire.

Beijing's 'development without democracy' model becomes aspirational for many members of local elites in Eastern Europe. China provides economic incentives and political cover through increased diplomatic cooperation, propaganda support, while channelling investment through digital infrastructure projects that tie Eastern European economies to Chinese technologies and data systems (Erie and Streinz 2022). Rather than providing actual substantial investments overall, China would focus on gaining a stake in strategic sectors in the three countries (transport infrastructure, energy infrastructure, extraction of natural resources, modern technologies, automotive, telecommunications, surveillance). It thus builds its leverage over sectors, which can be used as direct or indirect political influence. Supporting clientelist, non-transparent connections, China contributes to weakening democratic resilience. Moreover, China significantly increased its influence over local media through advertisements and direct shares. Finally, Beijing's tightening control of key industries and raw materials, as well as its intensifying competition with Washington in the Indo-Pacific, are some of the crucial factors driving the Western inward reorientation. Furthermore, if the Western democracies fail to ensure decent post-war arrangements for Ukraine and its reconstruction, China's role may significantly increase.

Turkey recognizes the Russian victory, and while respecting the Russian sphere of influence, it expands construction projects in the region, alongside business networks with regional oligarchs as much as Russia allows. Without confronting Russia, Turkey would present itself as an alternative to the EU's fading influence and as an external supporter of the hybrid regimes in place.

Meanwhile, the EU remains paralyzed by internal decision-making crises and enlargement fatigue, while the US reduces its European engagement (Momtaz 2025). Internal divisions within the EU hinder any progress toward enlargement, and a prolonged war in Eastern Europe, combined with domestic economic problems related to the green transition, pose severe competitiveness challenges for European industry. The EU redirects financial flows toward domestic interests and away from partnership support and post-conflict reconstruction. The EU is increasingly turning inwards and vacating the Eastern European space.

Driven by its growing security interests in the Indo-Pacific, Washington is pushing the Europeans to take on a greater share of the burden for their own security. This development, together with the redeployment of troops from Western to Eastern members of the Alliance, leads to a shift of attention within NATO toward its own internal redesign. The vision of further NATO enlargement slowly dissipates into

thin air, and a negotiated solution to the protracted conflict in Ukraine ultimately removes the enlargement from the agenda (Siddiqui 2025). The US turns increasingly isolationist (Kupchan 2020) and effectively vacates Eastern Europe.

By 2035, Eastern European societies are expected to resemble hybrid regimes, characterized by limited freedoms and a lack of rule of law, with foreign policies increasingly aligned with those of Moscow, Beijing and authoritarian Turkey. The idea of European integration survives only rhetorically. The *Going East* scenario thus represents not only a geopolitical reorientation but the consolidation of closed societies at both domestic and international levels. It stands for Western withdrawal and a local succumbing to pressure from the East, indicated by rigged elections, increased corruption, weakening civil societies, and increasingly authoritarian leadership.

Wild Card: The New Russian Empire Crumbles

This entire trajectory might, however, be significantly derailed or alternatively supercharged by unexpected events, such as a change of leadership in Russia. After the sudden death of Putin, a new President emerged from the ranks of Putin's technocrats. While he inherited a state that supposedly regained its great power status by self-declared victory in Ukraine and international recognition, the hollowness of institutions weakened by corruption and mounting economic problems have soon taken its toll. As a large-scale disaster in a chemical factory exposed corruption and graft at the upper levels of the regime, a new popular movement, joined by dissatisfied war veterans, started to call for accountability of top state figures and investigation into corruption. Massive protests shook the foundations of the Russian regime and while they do not necessarily lead to a democratic transition, they opened the way for similar movements in the Eastern Europe. While these were driven less by the desire to integrate with the West than with dissatisfaction with the local mismanagement and failures of authoritarian social contract, they nevertheless manage to reopen the question of moving the Eastern Europe out of the Russian sphere of influence.

Scenario 3: Wavering

The *Wavering* scenario envisions a favourable international context—the decline of autocratic great powers and renewed Western unity—but continued domestic uncertainty within Eastern European countries, which hinders their full integration

into the EU and/or NATO. While external conditions encourage democratic reforms, resilient civil society, and Western integration, decisive progress is prevented by internal divisions, societal polarization and preservation and deepening of hybrid features of regional regimes. Georgia, Ukraine, and Moldova continuously waver between pro-European policies and post-Soviet stability.

At the global level, Russia enters a prolonged internal crisis following a deep economic crisis and a leadership change. Moscow was unable to fully achieve its goals in Ukraine. US sanctions, a European shift away from Russian energy supplies, and a global oil glut severely reduced the state budget's revenues from oil exports, while China refused to financially support Russia amid a domestic economic slowdown. The economy almost collapsed, and the Kremlin agreed to the US-brokered peace deal, which included a de facto recognition of the conquered territories, albeit without an explicit prohibition on Kyiv's NATO membership. The immense amount of wasted human and material resources leads to a deepening social and political crisis in Russia (Luck 2025). The regime becomes increasingly rigid. As Russia's population shrinks (by 25-50% by the year 2100 according to the UN), the country faces stunted economic growth and a smaller workforce to sustain its industries. Russia's role in the global economy, particularly in energy and manufacturing, would also be diminished (Gutkovich 2025). Crisis and a lack of resources will result in a dramatic increase in anti-Western resentment, which will serve as a tool for consolidating Russian society and a rally-around-the-flag effect. Russia turns into North Korea on steroids—a paranoid, longing for empire-status but inward-looking, nuclear-armed, rogue state that dares not to repeat the Ukraine adventure by attacking a NATO member state, and which is consumed by internal corruption and mismanagement. This will generate tensions within Russia, as the accumulated resentment will need to be released. Therefore, Moldova, Georgia, and Ukraine continue to be targets of hostile Russian action. However, the lack of resources and internal destabilization will result in only limited subversive operations.

China's increasingly authoritarian Communist Party rule is facing a gradual economic slowdown that is undermining its global ambitions (Johnson 2023), while having second-order effects on Eastern Europe through a decrease in the leverage of the Beijing-Moscow partnership within the region. China, due to domestic economic issues, refocused on individual strategic projects that would have a high cost-benefit ratio in terms of improving China's image. This might include, for example, relatively small but visible aid to the health sector, or investments in

individual highly visible projects, such as bridge construction. China will also attempt to maintain ties to clientelist structures and co-opted elites, albeit with limited political impact.

In this scenario, Turkey steps into the regional space, offering partnerships without demanding reforms and building influence through construction, trade, and soft-power projects, including TIKA development initiatives. Turkey also assumes roles such as crisis mediator in various regional conflicts, provider of emergency or humanitarian aid, as well as military supplies and security equipment, even in specialized areas, such as border security. Turkey offers an alternative to EU conditionality tailored to the needs of power elites and their constituencies, thus contributing to the preservation of regional hybrid regimes. Although Turkey may not be able to match European funds, especially in Ukraine, it ensures that its activities are delivered promptly and highly visibly. Turkey's involvement further undermines the prospects of regional integration, as it prioritizes bilateral ties over EU-driven frameworks.

Foreign actors, particularly the EU, play an increasingly activist role. The US and the EU coordinate their positions more effectively to secure their supply chains and access to rare earth materials, independent of China. Their renewed commitment to a mutual free trade agreement proves to be an efficient measure to curb Chinese economic power and trade deficits. Washington, which has overcome its most anti-European MAGA phase, did not foreclose NATO enlargement, but the prospect of it looks bleak given the lack of progress in Eastern European countries and the lack of sustained diplomatic activity from the side of the West. Western markets open up for regional exports, yet these opportunities are not fully seized due to internal economic problems, oligarchic capitalism, and corruption.

Conditionality and support for civil society actors are essential to maintaining critical scrutiny when populist and nationalist leaders succeed in elections; however, they are not sufficient to facilitate profound reforms in a polarized environment, and they are often perceived as benefiting the narrow liberal bubble at the expense of the population at large (Burlyuk and Shapovalova 2018, Machavariani and Bolokvadze 2025). A narrative that authoritarian elites are eager to support. The U.S. maintains a half-hearted security presence, but its priorities lie elsewhere as local elites thwart a foreign push for reforms for their own benefit. Russian influence recedes but is replaced by internal populism and disinformation, often domestically generated rather than imported.

In Ukraine, despite relative stability following the end of active conflict, corruption scandals, populist politics, and competing oligarchic networks have slowed down important reforms. Western aid is conditional, but enforcement remains inconsistent. Citizens are growing increasingly disillusioned with the slow pace of EU integration (Razumkov Centre 2025), creating space for nationalist or technocratic alternatives. The tension between reformists and entrenched elites supported by oligarchic interests keeps the country in a perpetual state of ‘incomplete transformation.’ The peace deal with Russia does not prevent NATO membership, but the momentum fails to build up.

In Moldova, integration prospects are the best in years, but domestic politics remain deeply polarized (Koldomasov 2025). Regional and linguistic cleavages, combined with populist opposition that exploits social inequality, hinder the implementation of profound reforms. EU conditionality helps to modernize institutions, yet implementation is uneven due to the opposition of powerful oligarchs (Marandici 2021). The Transnistria question remains unresolved but contained. Yet an unfortunate series of violent events in Gaugazia attracts the attention of Turkey and further complicates domestic dynamics in Moldova.

Georgia remains the least advanced country in terms of EU enlargement and Western integration. The geopolitical environment favors a Western alignment, but domestic polarization between ruling and opposition forces continues to paralyze society (Meladze and Asaad 2025). The judiciary, media, and electoral system privilege incumbent authoritarian leadership. Pro-Western rhetoric dominates civil society and marginalised opposition, yet the government sides with oligarchic interests and increasingly isolates the country (Kakachia and Bechná 2025). A political regression toward closed-society principles is primarily a domestically driven process that leverages economic stagnation and societal cleavages.

By 2035, the region finds itself “in-between”—politically pluralistic and rhetorically aligned with the West, yet unable to consolidate liberal democracy. Elections are free, but not entirely fair, and reforms are frequent, yet inconsistent and reversible. Societies remain polarized and divided between a sense of reform fatigue and a hope for progress. Despite the new window of opportunity related to the gradual decline of the East, the countries of Eastern Europe do not capitalize fully on this moment. The *Wavering* scenario thus reflects the fragility of open societies when confronted not by external enemies but by their own internal contradictions—a mirror image of *Going West*’s optimism tempered by realism. This also leads to further outward emigration that further weakens the pro-democracy

and pro-Western forces. The key indicators of the *Wavering* scenario, therefore, appear to be good working transatlantic relations with intensified policy coordination, a profound domestic crisis in Russia, a slowdown in Chinese economic growth, and a lack of consistent societal-wide pro-European consensus in Eastern European countries.

Wild Card: A pro-Western Mayoral Alliance

Of course, nothing is pre-determined, and individual countries might still move in different directions. Some Eastern European countries may ultimately achieve a preservation and expansion of civic space, as well as a renewed push for EU membership from society. Although civil society movements remain fragmented and suffer from authoritarian repression and disillusionment, a new movement has begun to emerge around pro-Western mayors of several urban centres (see Musil and Yardımcı-Geyikçi 2024). While these politicians initially gain popularity by focusing on low-profile, good governance issues at the municipal level, they nevertheless develop a significant national profile over time. Moreover, through linkages with their peers from EU member states and other Eastern European countries, they are able to protect themselves from overt repression at the national level and build a sustained pro-European movement. Such a movement becomes a significant political force that pushes for the pro-Western reforms.

Scenario 4: Resisting

In this scenario, the EU and the US will largely vacate the space in Eastern Europe, much like in the *Going East* scenario. International conditions deteriorate for open societies, with autocratic powers—Russia and China—maintaining their global influence and constraining the West’s ability to act decisively beyond its borders. Yet, domestically, despite continuous pushing and probing by Moscow and Beijing, who are aided by a coalition of fellow authoritarians and opportunists, civil societies in Eastern Europe appear more resilient than expected. They resist authoritarian tendencies, sustaining democratic institutions and pro-Western aspirations against the odds (Nakashidze 2024) and with only limited support from Europe and the US.

The international environment is defined by Western strategic overstretch. The US attention shifts to the Indo-Pacific and the Western Hemisphere, while the EU experiences prolonged political fragmentation, decision-making paralysis, and economic stagnation (Momtaz 2025). Both NATO and the EU increasingly look

inwards. An overly cautious approach and internal divisions within the EU and NATO hinder progress toward the full integration of Ukraine, Georgia, and Moldova into Western structures, which in turn causes further resentment among member states. Internal disputes regarding the costs and benefits of further enlargement of both organizations make it impossible to move forward and admit the new countries, while both the EU and NATO look inwards and seek to consolidate the increasingly fractious organizations.

The war in Ukraine stops with a peace deal brokered by Beijing after Russia seizes the entire Donetsk oblast. Russia then tries to solidify its top-dog status in the neighbourhood through coercion and domestic interference, while China solidifies its influence via trade and technological dependency, offering aggressively better short-term deals than the EU. However, Russia cannot push hard and integrate Moldova, Ukraine, and Georgia fully into its orbit either. A prolonged war strained the resources of Moscow (Luck 2025), and although Beijing helped Moscow withstand Western sanctions (Korolev 2025), a worsening demographic crisis, together with other domestic problems, limit Russian space for manoeuvre.

Beijing continues to help Russia, but its own struggles with global and regional rivals make it difficult for China to do more and tip the balance. Facing public backlash over its ties with corrupt figures connected with authoritarian forces, Chinese companies move below the surface and continue low-key cooperation with individuals or selected companies and associations from the business sphere. This allows China to maintain its ties and influence while remaining a non-visible actor and avoiding further public controversies connecting it with unpopular politicians. China has acquired a significant stake in the telecommunications sector and the energy sector (particularly renewables), but refrains from tying it to political influence, unless it directly impacts core Chinese interests. With its role in ending the War in Ukraine, China's global image significantly improves, and China benefits from it in its propaganda, including in Eastern Europe. However, this might not necessarily translate into wide political support.

In Ukraine, despite the loss of a war and the slow pace of reconstruction, civic engagement remains robust. Volunteer networks born out of wartime solidarity transform into watchdog organizations that monitor corruption and defend public accountability. Grassroots nationalism (Howlett 2023) is channelled toward positive outcomes, with a strong role being played by veteran associations. Local governance and citizen initiatives help sustain democratic norms, even as the central government struggles to reform its institutions. Western funding becomes scarce,

but the robust Ukrainian diaspora keeps many places afloat, and non-governmental and municipal partnerships with Europe persist, maintaining Ukraine's partial integration into the Western normative orbit.

In Moldova, a weak central government faces periodic Russian interference and continuous pressure. However, pro-European segments of society—especially youth and diaspora communities—form the backbone of democratic resilience (Sterpu, Morari, and Teosa 2025). Digital activism and independent journalism play a significant role in countering foreign propaganda and combating the influence of local oligarchs. The Orthodox Church and conservative populist parties retain influence (Togt 2025), yet do not fully capture the state apparatus due to continuous civic mobilization and pressure to sustain the rule of law. Societal polarization and regional cleavages persist, but they fail to undermine democratic political processes that resist succumbing despite frequent underperformance.

In Georgia, the regime tries to consolidate authoritarian control but faces constant protests and international scrutiny. Western NGOs, although increasingly less influential and facing multiple restrictions, continue to support local civic initiatives. It is, nevertheless, the domestic political activism that contests populist leadership (Panchulidze and Youngs 2025) by repeatedly securing important seats in municipal elections. Polarization becomes an advantage because it prevents the consolidation of populist authoritarianism. The country's full integration into the Russian orbit remains improbable due to strong domestic opposition to Russian interference. Civil society and its constant mobilization around different causes related to the independence of state institutions, in effect, keeps the European idea alive, even when the political elite occasionally tries to suppress it.

By 2035, Ukraine, Moldova, and Georgia exist in a grey zone—generally democratic but continuously contested. They resemble post-communist societies shortly after the fall of the Iron Curtain or countries of former Yugoslavia at the end of the Yugoslav wars: internally pluralistic, socially restless, and institutionally unsettled. The dynamics in this scenario are complex. The EU and U.S. adopt a defensive posture (Siddiqui 2025), offering symbolic support but limited resources. Russia keeps coercive pressure through cyberattacks, disinformation, and economic means, but cannot force a political change in the region. China focuses on economic penetration and selective coercion of anti-Chinese activists rather than direct political control.

Under these circumstances, Georgia, Ukraine, and Moldova resist attempts to turn them into Moscow's suzerainties. They succeed in maintaining political independence, democratic institutions, and a pro-European orientation. The *Resisting* scenario thus embodies the idea of 'open societies under siege,' surviving in an unfriendly geopolitical environment while keeping alive an alternative vision of governance. Domestic opposition, grassroots mobilization, significant support from the diaspora and other countries with similar conditions, and the resilience of civil society to anti-Western populism and social media-fueled pro-Russian sentiments prevent a full-scale authoritarian relapse.

Wild Card: DOGE Comes to the EU

What remains unknown is how long civil societies in Eastern European countries can remain resilient to Russian pressure without more significant support from Europe. Although many of the activities of local civil society are self-funded, a significant number of these organizations also receive or have received support from the EU. However, as EU member states, as well as some EU institutions, became increasingly dominated by far-right and illiberal forces, calls for increased oversight, transparency, and cuts in foreign aid and democracy support have mounted. Taking inspiration from the series of wide-ranging cuts at the beginning of the Trump administration's second term, far-right parties managed to put some programs on hold for further review and cancel others. As a far-right politician provocateur launches a high-profile social media channel aimed at exposing the beneficiaries of EU funding, a coordinated campaign of disinformation, AI-generated fakes, and slander ensues, crippling the activities of some civil society organizations and opening others further to regime repression.

Conclusion and Recommendations

The four scenarios outlined in this paper—*Going West*, *Going East*, *Wavering*, and *Resisting*—represent possible futures for Eastern Europe shaped by the interplay between domestic political dynamics and the broader global struggle between major powers and the forces promoting open and closed societies and politics. They illustrate that the future of countries such as Ukraine, Moldova, and Georgia will depend not only on their internal capacity for democratic resilience and reform, but also on the trajectory of great power competition and the West's willingness to remain engaged.

The analysis shows that no outcome is predetermined. While *Going West* offers the most optimistic vision of integration into Western institutions and the consolidation of liberal democracy, it relies on sustained external support and robust domestic transformation. *Going East*, by contrast, warns of a relapse into authoritarianism facilitated by Western disengagement and coordinated autocratic assertiveness from Russia and China. Between these poles lie the more ambivalent paths of *Wavering*—where external conditions improve but internal weaknesses persist—and *Resisting*—where domestic actors maintain democratic values despite a hostile international environment.

Taken together, these scenarios reveal that the dividing line between open and closed societies is increasingly defined by domestic politics within each state, rather than solely along geopolitical boundaries. The endurance of open societies will depend on the strength of civil society, institutional accountability, and the ability of citizens to defend democratic norms even in the absence of strong international backing. For policymakers, this means that long-term stability and alignment of Eastern Europe with liberal democratic principles require continuous engagement, targeted support for reformist and civic actors, and a renewed Western strategic coherence.

Consequently, the competition between open and closed societies is not just a structural feature of international relations—it is a test of political will, institutional adaptability, and societal resilience. Societal polarization, populist nationalism, and the status-seeking behavior of closed, autocratic societies will drive a scenario dynamic; however, many difficult-to-predict intervening factors and events may derail development paths and shift the future towards alternative end-states. The choices made in the coming decade, both within Eastern Europe and across the transatlantic community, will determine whether the region moves toward integration and openness or succumbs to fragmentation and authoritarian regression.

The main task for the European Union is both to preserve its own cohesion and capacity to act internally, as well as to remain actively engaged externally, especially in the region of Eastern Europe, while supporting local democratic forces and civil society actors. The EU should not merely rely on existing tools and policies, but also strive to develop innovative new approaches and ways of supporting key interest groups and partnerships. To avoid *Going East* or *Wavering* scenarios, it is crucial to promote inclusive policies that ameliorate regional, ethnic, and other structural cleavages that can weaken local civil society and undermine trust in democratic

institutions. Developing a capacity of civil society through the provision of long-term support to local activists—not only in urban centres but also in small towns and regions, with a focus on activists’ ownership and protection of civil space as dialogue platforms—is essential. It represents the easiest way to facilitate the *Going West* scenario, or, alternatively, to preserve locals’ ability to resist a democratic backsliding or foreign interference. However, the EU’s support and outreach cannot target only narrow circles of urban elites, but it needs to be able to react to social polarization and reach out to the population at large. In this respect, it also proves crucial to monitor factors, such as media freedom, fairness of elections, and judicial independence, in order to assess the ability of countries to resist foreign interference and preserve functioning democracy even under adverse conditions.

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ABOUT RE-ENGAGE

Russia's war against Ukraine has radically altered European security. Confronted by the direst security crisis in decades, EU policymakers are forced to fundamentally

rethink their security policies. Europe has demonstrated unexpected unity and resolve, adopting a series of sanctions against Russia, increasing national defence spending, but also by deciding on a historic revival of the EU enlargement process.

Still, there is an urgent need to make sure that this process contributes to democratic, well-functioning and stable neighbourhood states, capable of countering external threats, particularly those posed by hybrid warfare. A thorough investigation is required to determine how this can be achieved without compromising the EU's values and security in the current context.

RE-ENGAGE's overarching ambition is to assist the EU in refining its foreign policy toolbox, including its enlargement and neighbourhood policies. This will enhance the Union's geopolitical leverage and provide better tools for democracy promotion in its neighbourhood. To achieve this goal, RE-ENGAGE will conduct in-depth studies in six candidate countries – three in the Western Balkans (Albania, Bosnia & Herzegovina and Serbia) and three in the Eastern Neighbourhood (Georgia, Moldova and Ukraine).