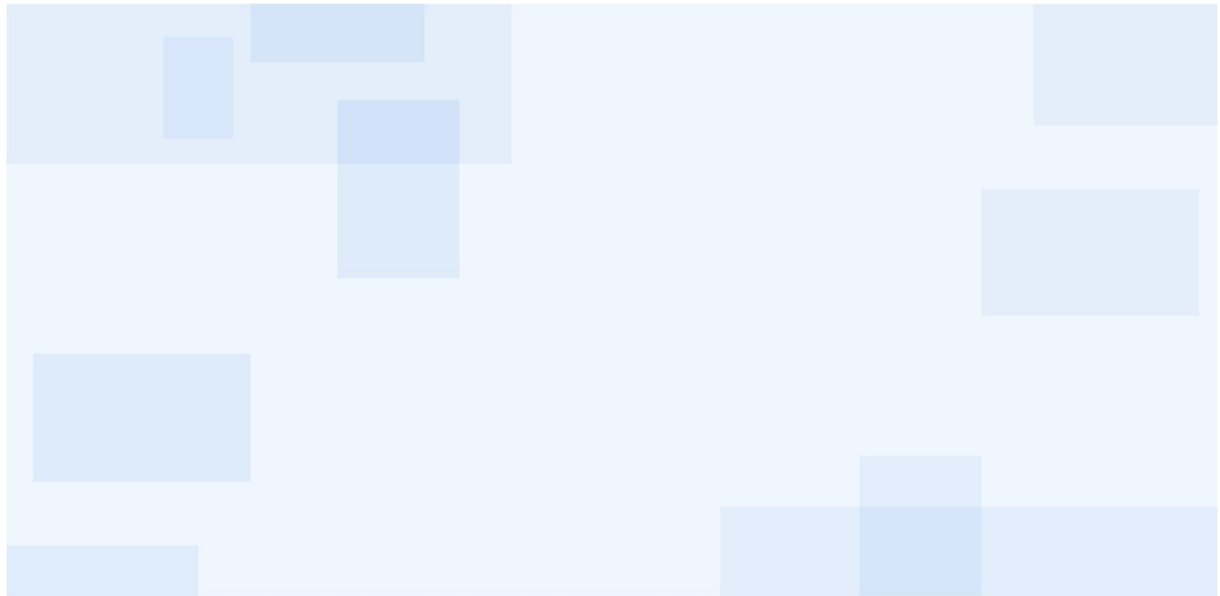


Policy brief



The EU and External Actors in the (Im)Possible Futures of the Western Balkans and Eastern Europe



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POLICY BRIEF

The EU and External Actors in the (Im)possible Futures of the Western Balkans and Eastern Europe

Asya Metodieva
Jan Daniel

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SUMMARY

- The policy brief reflects on findings of scenario analyses sketching alternative futures for Eastern Europe (Ukraine, Moldova, Georgia) and the Western Balkans by 2035, set against a backdrop of structural competition between Russia and China, the US, Türkiye, and the EU and the analysis of the strategies of these actors.
- Aggressive Russian behaviour and other forms of international challenge have turned the EU Enlargement into a key instrument of strategic engagement in both the Western Balkans and Eastern Europe.
- Two main trends are defining the situation in both regions – the international order marked by competition between the EU and rival main powers, as well as more competition between great powers on the international stage, and the intensifying tensions between ruling establishments and pro-democracy civil society. What varies across scenarios is how US policy, domestic governance in the region's states, and selected external shocks play out.
- The scenarios highlight that the impact of US disengagement from both regions is asymmetric for the EU. Vacuums in transitional regions are



filled by rival powers, leaving the EU to bear greater stabilisation burdens alone. Moreover, democratic backsliding in the two regions combined weakens the EU's credibility and thus its leverage.



Introduction

What happens if the US pulls out diplomatically and militarily from Europe? What if China expands its presence and economic footprint in the European neighbourhood? What if Russia escalates the war by increasing disruptive efforts in other Eastern European and Western Balkan countries? All these questions are a stress test of the EU's foreign policy. The brief maps the nature and limits of Russian, Chinese, and Turkish influence in the EU's neighbourhood, while identifying how these powers' influence might play out in the future and where the EU has leverage to counter it.

The 2022 full-scale invasion of Ukraine made it clear that developments in the EU's neighbouring regions can no longer be treated as purely domestic. The war has shown that Russia is ready to use force to redraw the political map. Additionally, changes in the EU's relations with China and the USA, and in the forms of engagement of both great powers in the European neighbourhood, are crucial for the Western Balkans (WB) and Eastern Europe (EE), and the fate of both regions is closely linked to the EU's internal cohesion. As we observe across both regions, the active civil society is a consistent variable: even in the most pessimistic scenarios, bottom-up pressure persists.

Domestic struggles in both regions intersect with intensifying great-power competition. Domestic governmental and civil society actors have significant autonomy in decision-making, but their choices intersect with and are influenced by external actors' behaviour. This brief's focus on external actors does not aim to ignore domestic dynamics. Instead, we recognise that at this specific historical moment, in the WB and EE, the domestic and the geopolitical are inseparable. The regional focus is to highlight big-picture developments, yet each country has its own unique position.

This policy brief outlines the commonalities and differences between the WB and EE regarding alternative futures tied to external actors. It draws on studies produced within the Re-Engage project, moving from empirical diagnosis to strategic foresight. Daniel et al. (2024) mapped the interests and tools of Russia, China, Türkiye, and the US across both regions, and Metodieva (2024) examined how EU officials perceive these competitors. These two background papers feed directly into the scenario analyses by Metodieva and Daniel (2025) on the Western Balkans and Daniel and Halás (2025) on Eastern Europe. On the following pages, we first map the strategies of external actors in both regions, then discuss the most important trends associated with the developed scenarios and their impact on the EU.

External Actors' Strategic Approaches to the Western Balkans and Eastern Europe

The EU has found itself in an increasingly contested environment in Eastern Europe and the Western Balkans. Forms of engagement of the main EU's competing actors – Russia, China, Türkiye, and the USA already define the regional geopolitical environment. The EU faces diverse combinations of assertive diplomacy, hybrid warfare, military aggression, and economic and cultural leverage that external actors use to engage with local hybrid regimes. Russia has challenged the regional order in Eastern Europe by invading Ukraine and supporting illiberal actors and anti-Western groups and figures elsewhere, whereas China's economic incentives represent a promise for a geopolitical alternative. Türkiye's investment and cultural outreach to particular communities, especially in the Western Balkans, leaves it with a light footprint and low-scale leverage, whereas the USA, under the Trump administration and its unilateral initiatives, counters longstanding EU policy positions. Each external actor represents a type of influence that operates through different channels.

Table 1. External actors' toolkit in the Western Balkans and Eastern Europe.

Russia	China	The USA	Türkiye
• Energy dependencies; • FIMI • Nationalist networks, support for secessionist movements; • Destabilises rather than builds.	• Infrastructure investment; • Regime-security support; • Avoids ideological conditionality; • Enables kleptocracy and sustains illiberal and hybrid regimes.	• Security architecture (NATO) that underpins regional stability; • Key diplomatic actor on a global scale • Its presence or absence changes the entire risk calculus for local actors.	• Cultural, religious, and ethnic ties alongside economic interests; • Swing actor that can either complement or undercut EU goals depending on its own domestic situation.

Russia is both a spoiler and an aspiring hegemon and is by far the most aggressive actor in both regions. In Eastern Europe, Russia pursues a full-spectrum influence strategy: it weaponises energy dependencies, funds pro-Russian political parties such as the now-banned Shor Party in Moldova, backs oligarchic networks, uses the Russian Orthodox Church as a soft-power vehicle, and deploys disinformation and

other FIMI (Foreign Information Manipulation and Interference) campaigns that exploit socioeconomic grievances, conservative values, and ethnic cleavages. In the Western Balkans, Russia's goals are more limited: it acts primarily as a spoiler, exploiting political and societal frustrations with the slow pace of EU enlargement, supporting Serbian nationalist narratives, and encouraging separatist dynamics in Republika Srpska. Unlike in Eastern Europe, Russia does not seek to draw the Western Balkans into its own institutional orbit, but is content to keep the region destabilised and EU integration blocked.

China operates on a different logic, centred on expanding its economic footprint by creating dependencies. Chinese state-owned enterprises have built highways in several Western Balkan countries, acquired copper mines in Albania and Serbia, and constructed energy infrastructure across the region, often financed by opaque loans from Chinese state banks. Unlike the EU, Chinese investment comes without conditionality on the rule of law or governance standards, making it attractive to local elites embedded in patronage networks who stand to benefit personally from deals. However, a moment of "sobering up" is evident, as many countries are reassessing their cooperation with China due to unfulfilled promises and corruption scandals.

Türkiye pursues a "balancing strategy" across both regions. It leverages neo-Ottoman ideology, ethnic and religious ties to "kin communities," and growing military capabilities. In the WB, Türkiye has positioned itself as a mediator and a limited security actor. It channels development aid, funds mosque construction and cultural programmes, and organises youth and educational outreach. In EE, Türkiye is more hesitant, constrained by Russian dominance and its own ties with Russia. Nonetheless, it has consistently supported Ukrainian and Georgian territorial integrity while refusing to join Western sanctions against Russia, a balancing act that can be seen as a feature rather than a bug of Turkish foreign policy.

The USA is an increasingly reluctant and erratic actor with limited instrumental interests. In the WB, the US engagement peaked in the 1990s and has since oscillated between crisis-driven interventionism and benign neglect. The Trump administration introduced several unilateral initiatives and supported destabilising figures, such as Milorad Dodik. Russia's full-scale invasion of Ukraine initially transformed US engagement in Eastern Europe as Ukraine received over \$106 billion in military, budgetary, and humanitarian aid. Although the US has not formally ended military support for Ukraine, it has dramatically reduced it since January 2025 and shifted the financial burden to Europe. The asymmetry of interests between the

USA, Ukraine, and the EU has caused frictions that will have a long-term impact on the transatlantic relationship.

The EU thus faces competitors with various interests and strategies, but complementary effects. Russia actively erodes trust and impedes democratic reform, China builds parallel networks of elite dependence, Türkiye cultivates alternative loyalties, and the USA pursues interests that do not always align with EU values and enlargement goals. However, none of these actors can substitute for the EU in terms of overall economic presence or public support. Moreover, individual states' agencies play a key role in how Russia and China are treated. In EE, Ukraine's resistance to Russia's aggression is central to how the region and the EU engage with each other and with Moscow. In the WB, Serbia's case shows how Russian influence could be institutionalised and formalised. Serbia pursues EU membership while refusing to impose sanctions on Russia and signing a "community with a shared future" agreement with China in May 2024. Polls and the research carried out in Re-Engage consistently show that majorities across both regions prefer EU integration. Therefore, the challenge for the EU is to develop a policy that takes local governments' agency seriously while addressing structural vulnerabilities, such as corruption, weak institutions, and state capture, that external actors consistently exploit.

The Drivers and Scenarios of the Regional Futures

The foresight scenarios posit that the political trajectories of the WB and EE over the coming decade will be shaped by a combination of EU engagement, Russian and Chinese influence, and domestic societal resilience. Scenarios for both regions feature a number of specific trends, ranging from future economic developments to particular domestic political tensions. A structural tension that appears across all scenarios is the EU's dilemma between prioritising security and stability for itself and its neighbouring states and maintaining the integrity of democratic conditionality. Wherever the EU has tolerated stabilocratic arrangements that privilege stability over democracy, it has facilitated democratic backsliding and created institutional vacuums that external competitors, Russia and China in particular, have exploited. Thus, the EU's willingness and ability to integrate the EE and WB countries, and its capacity to maintain unity both internally and with the USA on this matter, represent a crucial variable in foresight.

The diminishing US interest in the WB and EE is a trend that, in one way or another, underpins all the scenarios. A US-backed deterrence posture has constrained

Russian and Chinese influence in the region. Its erosion or withdrawal would likely give them more room to expand their political and economic presence. A continuous US engagement in EE remains indispensable for the prospect of NATO enlargement in particular, but the EU's readiness to act and support for reformist and pro-democratic forces in Moldova, Ukraine, and Georgia are essential conditions for a sustainable pro-Western orientation in general. In the case of a continuous Western fragmentation and a rift in the transatlantic relationship, the EU's external relations with other geopolitical actors will define the regional environment and shape regional economic dependencies and political alignments.

The international order is increasingly defined by competition between different blocs. This dynamic used to be framed as a rivalry among the USA, the EU, and China, but it must also account for Russia's assertive, autocratic foreign policy and the rise of populist movements within Western democracies themselves. This cleavage, which we call a competition between open and closed societies, operates at both the domestic and international level, and it is the dominant framework through which political developments in the WB and EE should be understood. Populist nationalism represents one of the key forces shaping scenario dynamics, with consequences that extend well beyond domestic politics. It affects transatlantic consensus, constrains the EU's capacity for collective action, and weakens the bloc's ability both to support Ukraine against Russian aggression and provide an ideology that can align with Russian interests.

The struggle between pro-democracy movements and various forms of authoritarianism in both regions is inseparable from the broader geopolitical alignments: Russia and China versus the EU and NATO. The most consequential manifestation of polarisation is the gap between political elites gravitating toward authoritarian practices and civil society actors that resist democratic backsliding. This tension between the elite and society is not just a symptom of political dysfunction but also a structural vulnerability of any autocratic regime, whose stability depends on managing and manipulating that relationship. Combined with status-seeking behaviour at the elite level, it becomes a central driver of how such regimes act both domestically and in their external relations.

Scenarios of Eastern Europe's geopolitical development



Scenarios of the Western Balkans' geopolitical development



Key Takeaways from the Scenarios for the Western Balkans and Eastern Europe

Across both regions, the scenarios point out that domestic and international dynamics do not change simultaneously, and outcomes are most uncertain where the two diverge. The scenarios for Eastern Europe and Western Balkans should not be read as forecasts of the most likely outcome, but as a range of plausible futures against which EU policy can be stress-tested.

The first key takeaway is that the success or failure of the EU's conditionality model depends on an external variable it cannot control, namely, the perceived threat from rival powers. Across both regions, the scenarios indicate that EU reform leverage tends to strengthen when Russian or Chinese influence is most visible and international and domestic actors are aware of it, and to weaken when that influence decreases. This means that if external rivals retreat, hybrid elites do not automatically reform and align with the EU; instead, they can simply substitute one source of patronage for another, whether internal oligarchic capital or a different external partner. A key policy implication is that the EU's enlargement strategy should not be driven reactively by external actors' actions, since such forces are unpredictable and beyond the EU's control.

The second key finding is that civil society resilience may, in some cases, operate independently of the international climate. The scenarios in which civil society sustains pressure for reform despite an unfavourable external environment show that domestic resilience can hold ground even in the absence of international alignment. This suggests that civil society can be built and sustained, rather than simply emerging when conditions in the international system allow. The implication is that civil-society support should be protected as a resilience investment in its own right, rather than merely treated as a secondary outcome tied to geopolitical circumstances.

The third key finding concerns the asymmetry in the EU's agency across the two regions. On the one hand, in some countries, the EU's influence is largely dependent on domestic political outcomes, meaning that the EU's leverage depends on whether local liberal forces are in charge. On the other hand, in some scenarios, the EU's influence is filtered through the actions of other external powers. Most scenarios are determined by the degree of US, Russian, or Chinese presence rather than by EU policy choices. This creates a challenge, as the EU balances its own initiatives with its ability to respond to shifts in external actors' engagement with the two regions.

Implications for the EU and Recommendations

External actors' behaviour in Eastern Europe and Western Balkans requires strategies tailored to both regions and the individual needs and priorities of each country. Based on our scenario analyses, we list the following recommendations to

the European Commission (EC), the European External Action Service (EEAS), and the member states.

Scenarios involving US disengagement, deeper Chinese and Russian influence, or more assertive Russian behaviour all point to the same strategic priority: the EU should invest in democratic resilience and economic independence in both regions as a key step against external dependency.

The EU already deploys a substantial toolkit toward this end, including IPA/ENI financial assistance, EULEX rule-of-law missions, the European Peace Facility, sanctions regimes, energy diversification initiatives (the Trans-Adriatic Pipeline, the Ukraine Energy Support Fund), and counter-disinformation bodies such as the East StratCom Task Force and EUvsDisinfo. However, implementation continues to suffer from a gap between these instruments and their enforcement.

- The EC should continue supporting civil society and independent media as a resilience investment in the broader geopolitical climate.
- The EC should strategically invest in critical infrastructure, particularly in energy and digital sectors, to reduce dependence on non-EU sources and protect digital sovereignty.
- The EEAS should maintain its response capacity for disinformation in Eastern Europe and the Western Balkans. This response capacity should reflect each external actor's distinct toolkit, given that Russia, China, and Turkey rely on different channels.
- The EC should match accession-progress rhetoric to verified reform results rather than encouraging signals, so candidate-state governments cannot read optimistic statements as permission to delay reforms or maintain prioritised relationships with Russia or China over their commitment to the EU.
- The EC needs a proactive China strategy for both regions, particularly as Ukraine's post-war reconstruction opens new entry points for Chinese capital that could complicate EU membership conditionality.
- Member states should coordinate bilateral and EU-level communication on enlargement to avoid the kind of uncoordinated diplomatic initiatives in the Western Balkans previously associated with Hungary.

- The EEAS should make the recent opening of accession negotiations with Ukraine and Moldova a central node of its public diplomacy, together with specific examples of benefits such as single market access, energy and transport integration, etc., so citizens see EU progress as tangible, not abstract.
- In its strategic communication, the EEAS should contrast Ukraine and Moldova's progress with Georgia's frozen accession process using this gap to demonstrate that domestic political choices have direct, visible consequences for EU integration.
- The EEAS should use the Ukraine–Moldova negotiation breakthrough to sustain support for local democratic forces and civil society. In the Western Balkans, the EU has the opportunity to further support new resistance movements in Serbia and Albania.

ABOUT AUTHORS

Asya Metodieva is a senior researcher at the Institute of International Relations in Prague. Her research interests include political violence, radicalisation, disinformation campaigns and polarisation. Asya analyses political developments in Central and Eastern Europe and the Balkans.

Jan Daniel is a senior researcher and the Head of the Centre for the Study of Global Regions at the Institute of International Relations Prague. His professional interests include politics and security in the Middle East (with a focus on Lebanon and Syria), Czech foreign and security policy, and the idea of societal security, particularly concerning debates on hybrid warfare, foreign influence, radicalization, and external intervention. He is a member of the Editorial Team of the *Czech Journal of International Relations*.

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).