

SHAPING EUROPE — SCENARIOS FOR THE EUROPEAN UNION IN 2030

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At a Glance

The European Union faces critical challenges that will shape its future. This publication explores future scenarios for the EU in 2030, focusing on security, the economy, and enlargement. Based on this scenario analysis, recommendations for strategic action are made:

European Security: Strengthening Resilience

- › Russia's war on Ukraine underscores the need for stronger EU defense cooperation and a robust transatlantic partnership.
- › Critical external dependencies and cybersecurity are major vulnerabilities.

Key Policy Actions:

- › Proactively shape the geopolitical environment by demonstrating unity.
- › Strengthen energy security and critical infrastructure protection.
- › Invest in defense technologies and deepen NATO cooperation.

Economic Development: Innovation & Competitiveness

- › The EU needs economic strength to meet its climate goals, strengthen its resilience and address its demographic challenges.
- › Strategic investments in AI, digitalization, and resilience are crucial.

Key Policy Actions:

- › Conclude more and stronger trade alliances.
- › Create a common EU defense market.
- › Implement targeted policies for skilled migration and workforce modernization.

EU Enlargement: Strategic Expansion

- › The EU must ensure a clear, structured accession process while safeguarding political cohesion and market stability.

Key Policy Actions:

- › Build a stronger political consensus on enlargement.
- › Support candidate countries in key reforms.
- › Address security risks linked to enlargement.

The EU must act decisively to enhance security, strengthen the economy, and manage enlargement strategically. Three in-depth essays further explore these challenges in more detail.

Table of Contents

| | |
|--|-----------|
| 1. Introduction | 3 |
| 2. Methods | 5 |
| 3. Portfolios for Policy Areas | 7 |
| 3.1 Portfolio for European Security | 7 |
| 3.2 Portfolio for the European Economy | 9 |
| 3.3 Portfolio for European Enlargement | 10 |
| 4. Scenarios for the EU in 2030 | 12 |
| 5. Policy Recommendations | 17 |
| 5.1 Security | 17 |
| 5.2 Economy | 18 |
| 5.3 Enlargement | 19 |
| 6. Issue Analysis | 20 |
| 6.1 Energy as a Crisis Amplifier: A Strategic Challenge for Security Policy | 20 |
| 6.2 EU Trade Policy for the Future | 23 |
| 6.3 EU Enlargement – What Needs to Happen for a ‘Good Tango’ to Come True | 26 |
| References | 30 |
| The Authors | 32 |

1. Introduction

The European Union stands at a critical crossroads. As a unique political and economic project, the EU has demonstrated that cross-border cooperation and integration not only safeguard peace but also promote economic prosperity and political stability. However, the world today is marked by rapid change and uncertainty. Global crises, geopolitical tensions, and technological revolutions call for bold decisions and innovative approaches. At the same time, member states face complex challenges, such as addressing climate change, reforming the European asylum system, and combating growing social and economic inequalities. Moreover, managing global instability – whether stemming from Russia’s war of aggression against Ukraine, tensions in the Indo-Pacific, or the reorganization of trade relations – will be pivotal in shaping the EU’s future direction.

The next five years offer a crucial window of opportunity to lay the groundwork for a strong, resilient, and future-oriented Europe. Achieving this goal requires a clear vision, collective solidarity, and the capacity to translate shared values and interests into concrete action. That is why the Konrad-Adenauer-Stiftung organized a ‘Workshop on European Issues’, which discussed in depth key questions concerning the future of the European Union. Three core issues emerged as particularly significant for the EU’s development over the next five years: security policy, economic development, and the enlargement of the Union to include new member states. These issues are closely interconnected, presenting both challenges and opportunities that necessitate a strategic and coherent approach.

The next five years
offer a crucial window
of opportunity.

Security Policy: Strengthening Resilience in Uncertain Times

European security policy faces significant challenges arising from geopolitical tensions, hybrid threats, and the reorganization of global power structures. The war against Ukraine has highlighted the urgent need to intensify military cooperation within the EU and to strengthen the transatlantic partnership. At the same time, the concept of strategic autonomy has gained prominence: How can Europe reduce its dependence on external actors without compromising its multilateral commitments? Over the next five years, the EU must substantially expand its defense and cybersecurity capabilities. This includes better integration of national armed forces, increased funding for the European defense industry, and the development of joint strategies to counter cyberattacks and disinformation campaigns. Equally vital is the EU’s cooperation with partner countries to ensure stability in the EU’s immediate neighborhood.

Economic Development: Harmonization and Innovation as Drivers

The economic future of the European Union will largely depend on its ability to navigate the challenges posed by digital transformation, climate change, and global competition. The goal of achieving climate neutrality by 2050 will require significant investments in renewable energy, sustainable infrastructure, and the green transformation of industries. In doing so, the EU must strike a delicate balance between economic competitiveness and ecological responsibility. Equally critical is the digital economy. Advancing technologies such as artificial intelligence, quantum computing, and 5G will be pivotal not only for economic performance but also for Europe's technological sovereignty. At the same time, the social dimension must not be overlooked: measures to reduce inequalities among member states and to promote employment – particularly for young people – are essential to fostering social cohesion across the Union.

EU Enlargement: Opportunities and Challenges

The debate on EU enlargement has once again taken center stage, particularly with regard to countries in the Western Balkans, Ukraine, and Moldova. Enlargement presents an opportunity to promote stability, democracy, and prosperity in the EU's eastern neighborhood. However, it also poses significant challenges: How can the Union ensure that new member states meet its political and economic criteria without slowing down the integration process? Over the next five years, the EU will need to reform its accession policies to provide clear pathways for potential candidate countries while preserving the Union's functionality and cohesion. This will require not only institutional adjustments but also addressing how an expanded single market can be structured to ensure fair competition and equal standards for all members.

Enlargement presents an opportunity to promote stability, democracy, and prosperity.

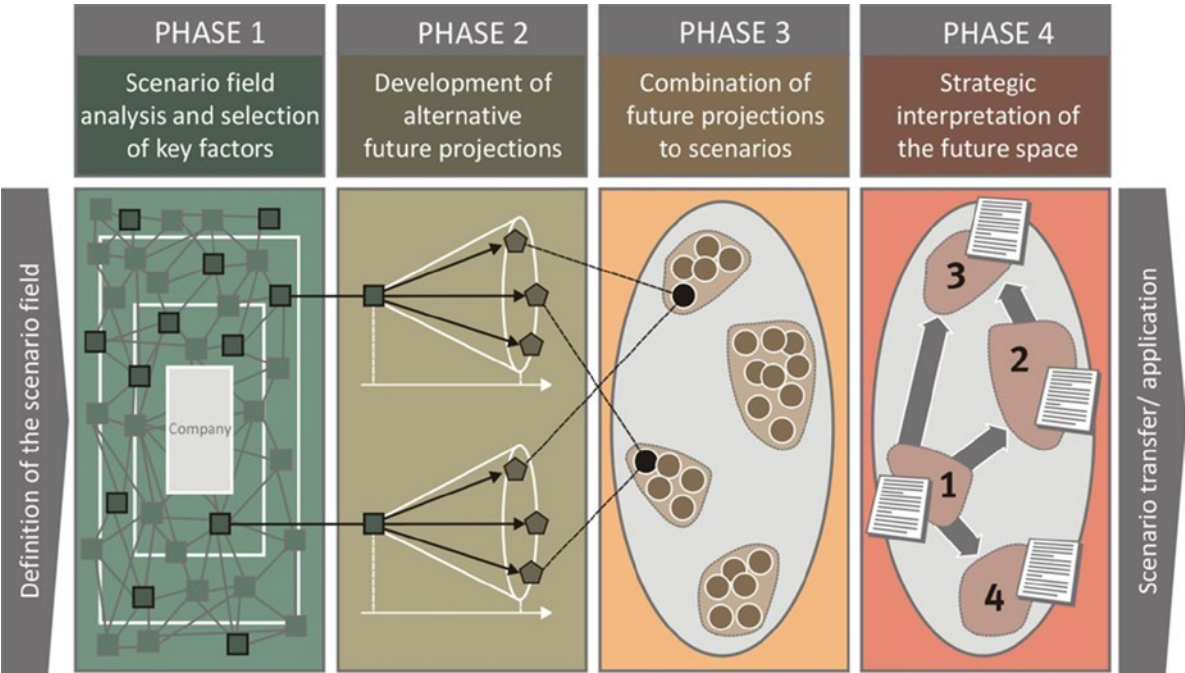
2. Methods

As part of the ‘Workshop on European Issues’, a scenario game was conducted. Scenarios are a highly effective method for exploring future questions and systematically examining complex developments. In the uncertain and dynamic environment faced by the European Union, scenarios enable the exploration of various possible futures and the development of well-informed strategies. Their strength lies in embracing uncertainty rather than attempting to eliminate it, fostering holistic thinking and opening fresh perspectives on potential developments. This facilitates decision-making and cultivates a shared understanding of the challenges at hand.

The strength of scenario games lies in embracing uncertainty rather than eliminating it.

The Scenario Game provided a platform to explore the three core themes: security policy, economic development, and EU enlargement. Participants not only analyzed opportunities and risks but also identified interdependencies among these themes, leading to the development of strategic approaches. This engaging yet structured format encouraged in-depth discussions and resulted in well-informed policy recommendations for the European Union. The scenario creation is based on the Scenario-Management methodology, which unfolds in four distinct phases (Figure 1):

Figure 1: Scenario Methodology



Scenario Field Analysis and Key Factor Selection (Phase 1): The defined scenario field is systematically structured and described by a larger number of precise influence factors. The dependencies among these factors are evaluated and analyzed in an influence analysis. Based on the results, a smaller set of key factors is selected. These factors either play an important role for the future development of the focused system or are essential for the planned application of the scenarios.

Development of Alternative Future Projections (Phase 2): Possible future developments – so-called future projections – are identified and verbalized for each key factor. These projections describe strategically relevant, characteristic, and qualitative alternatives for the future development of the individual key factors. The goal is not to find only the most likely option, but to develop a variety of images that describe the whole window of opportunities within a defined future horizon.

The goal is to develop a variety of images that describe the whole window of opportunities.

Combination of Future Projections to Scenarios (Phase 3): Scenarios are concise descriptions of possible, alternative futures. Their creation is based on the identification of highly consistent combinations of future projections. The result is three to six alternative future images that cover the entire ‘window of opportunity’. The scenarios are calculated using a specific scenario-software based on the evaluation of the logical fit of the future projection. The calculated scenarios are analyzed separately and described either as business files, future stories or newspapers of the future.

Strategic Interpretation of the Future Space (Phase 4): After their development, the scenarios are interpreted: Who are the winners and losers? Which are the most relevant or likely scenarios? Which indicators might signal the occurrence of a scenario at an early stage? What are the implications of the scenarios for us and how should we act within the different environments? This step forms the basis for the scenario application within the strategic planning process.

The scenario process was conducted through interactive workshops, enabling participants to engage with the four phases of the process in a structured and collaborative format. The workshops were divided into three groups, each focusing on one of the core issues – security policy, economic development, and EU enlargement. The group work facilitated the integration of diverse professional perspectives and expertise, while the collective consolidation of insights during the third phase ensured the development of a comprehensive and coherent representation of potential futures. This ‘future map’ became a valuable tool for systematically analyzing the EU’s core issues and laying the foundation for strategic decision-making.

3. Portfolios for Policy Areas

European security, economic development, and enlargement policy are key areas that will shape Europe's future leading up to 2030. In the area of security scenarios, both the internal unity of the EU and the state of the international order play a decisive role. Possible developments range from an ideal scenario of 'Heaven on Earth', through a stable yet tense environment in 'Hybrid Peace', to fragmented situations like 'Europe of Nations' or dangerous escalations described in 'On the Way to War'.

Portfolios for the policy areas security, economy and enlargement are formed.

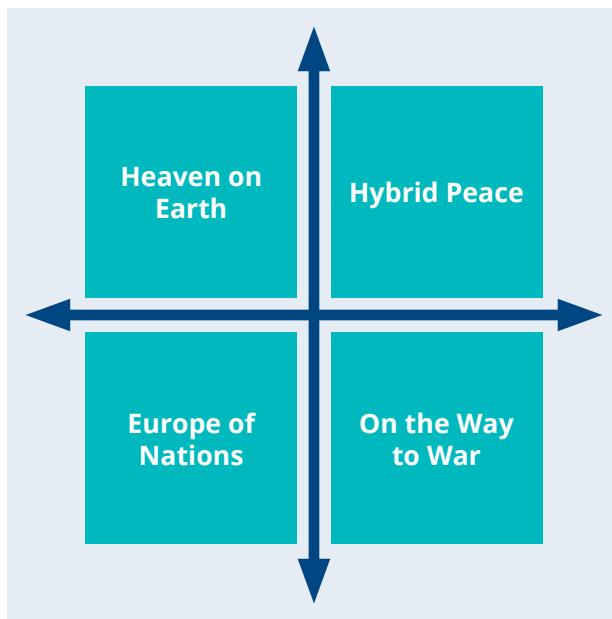
The second area focuses on economic portfolios, where factors such as competitiveness, fiscal policy, demography, and the rules-based world order are central. These combinations give rise to diverse future options, including the stable but stagnant 'Austerity Trap', the strategically prioritized 'Lean & Mean', the state-driven 'Entrepreneurial State', and the consumption-oriented 'Dolce Vita'.

The third area addresses the EU's enlargement policy. The integration of new member states depends on the political will of the EU and the reform efforts of candidate countries. Potential scenarios include a closed-off 'Fortress Europe', a successful integration process reflected in 'Good Tango', or stagnation and disengagement represented by 'Waste Land', and 'Frozen European Dream'.

3.1 Portfolio for European Security

The European security situation can be evaluated based on two key dimensions: 'Unity in the EU' versus 'Polarization' (Internal Cohesion) and 'International Cooperation' versus 'Great Power Competition' (External Cohesion). The first dimension defines whether the EU is politically unified or fragmented, while the second dimension contrasts global collaboration with rivalry among major powers such as the United States, China, and Russia.

Matrix 1: External Cohesion (x) and Internal Cohesion (y)



The interplay between these factors results in four scenarios: 'Heaven on Earth', 'Hybrid Peace', 'Europe of Nations', and 'On the Way to War'.

- 1. Heaven on Earth:** The EU is internally unified, and a cooperative international order prevails. Rules-based global organizations function effectively, ensuring international stability. Within the EU, solidarity is particularly evident in crisis management, where coordination and cooperation operate seamlessly. A strong transatlantic relationship with the United States further underpins shared security and economic interests. Additionally, functional mechanisms for conflict resolution prevent geopolitical tensions from escalating.
- 2. Hybrid Peace:** The EU maintains internal unity but faces a global environment shaped by great power competition. Despite increasing geopolitical tensions, the EU remains stable and capable of decisive action. Its defense industries are strengthened, ensuring security and resilience, while robust supply chains support economic stability even in times of crisis. Cooperation with NATO is particularly strong, with deterrence mechanisms effectively preventing conflicts from escalating into open military confrontations.
- 3. Europe of Nations:** Polarization dominates within the EU, but international cooperation persists globally. In this situation, the EU loses its integrative power as national interests take precedence over collective action, leading to political fragmentation and partial disintegration. However, global cooperation mechanisms, particularly NATO, remain intact and continue to ensure a degree of international stability. The transatlantic partnership shifts toward a rather bilateral format, with individual European states cooperating directly with the United States.
- 4. On the Way to War:** Polarization within the EU coincides with a global order dominated by great power competition. Geopolitical tensions intensify, fueled by the rising influence of revisionist powers like Russia and China alongside the proliferation of weapons of mass destruction. Protectionism disrupts global trade,

A strong European defense base is essential.

exacerbating economic uncertainty and resource scarcity. Within Europe, national sovereignty movements gain momentum, further deepening political fragmentation. Conflicts multiply, deterrence mechanisms erode, and hybrid threats such as cyberattacks, and disinformation escalate.

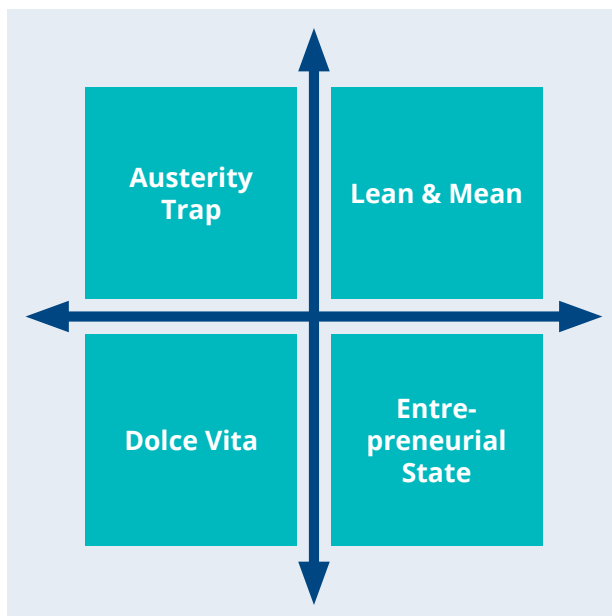
3.2 Portfolio for the European Economy

In a clustering process, four dimensions were identified based on the criteria of relevance and certainty. The dimensions assessed as most relevant and most certain until 2030 are: Competitiveness, Fiscal Policy, Demography, and the Rules-based World Order. Based on these four dimensions, two portfolio matrices were formed, representing an internal and an external sphere.

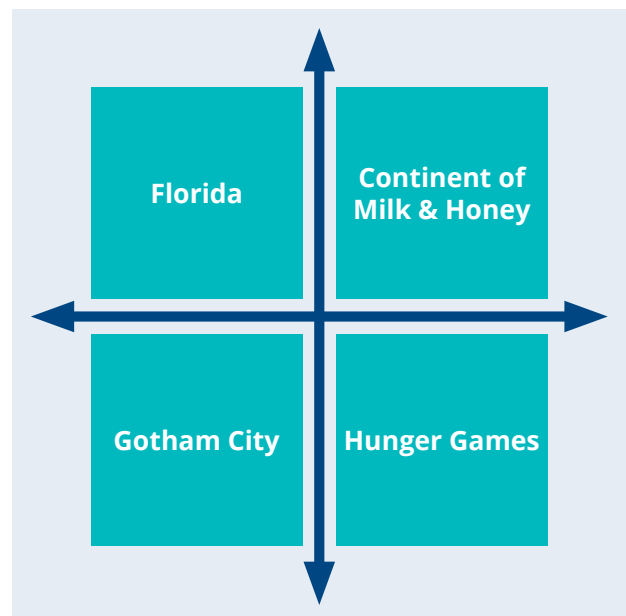
The internal matrix, Competitiveness and Fiscal Policy, can be directly influenced by European policymakers, whereas the external matrix, Demography and Rules-based World Order, is considered to consist of exogenous factors that can only be indirectly influenced. In the first, the EU can shape the preferred future portfolio, whereas in the second, the EU must build up its capacity to respond to the portfolio it will be confronted with.

Policymakers can shape competitiveness and fiscal stability.

Matrix 2: Competitiveness (x) and Fiscal Policy (y)



Matrix 3: Demography (x) and Rules-based World Order (y)



With regard to the combination of Competitiveness and Fiscal Policy, the following portfolios for the EU in 2030 have been identified:

- 1. Austerity Trap:** Low competitiveness and a strict fiscal policy have resulted in long-lasting stagnation within the EU. European companies can expect neither more favorable framework conditions, such as efficient public administration and lower taxes, nor public investment in infrastructure or education and research. On the other hand, the EU proves to be fiscally stable.

2. **Lean & Mean:** The EU has undergone a challenging prioritization process of public spending to preserve its long-term fiscal stability. Investments have been focused on areas that boost competitiveness, including infrastructure, education, research, and state modernization.
3. **Entrepreneurial State:** The EU and its member states increasingly act as state entrepreneurs, intervening in the single market through large-scale industrial policies. This approach strengthens competitiveness in specific areas by 2030 but comes at the expense of weakened fiscal stability.
4. **Dolce Vita:** Public spending is not strategically prioritized but primarily directed towards consumption purposes, such as pensions, social assistance and state bonus programs. While this benefits citizens in the short run, it undermines both competitiveness and fiscal stability in the long run.

Fiscal stability requires prioritization.

The combination of Demography and Rules-based World Order leads to the following portfolios:

1. **Florida:** Unfavorable demographic trends, combined with minimal qualified immigration are embedded in a rules-based world order. The global environment provides stability to the internationally intertwined European economy, which at the same time is gradually losing its former strength in both quantity, such as GDP growth, and quality, such as innovation and company start-ups.
2. **Continent of Milk & Honey:** The EU witnesses the beginning of a demographic turnaround through higher birth rates and skilled immigration. The rules-based world order remains intact, enabling Europe to sustain its open-market based business model.
3. **Hunger Games:** The early stages of a demographic turnaround coincide with the deterioration of the rules-based world order. International confrontation and division emerge alongside a demographically stabilized Europe that retains its capacity to act.
4. **Gotham City:** Unfavorable demographic trends, marked by low birth rates and minimal skilled immigration, combined with the deterioration of the rules-based world order gradually weaken Europe from within. The EU's capacity to assert its interests in a fragmented and conflict-prone global environment diminishes over time.

Demographic trends and the international environment will determine the EU's room for manoeuvre.

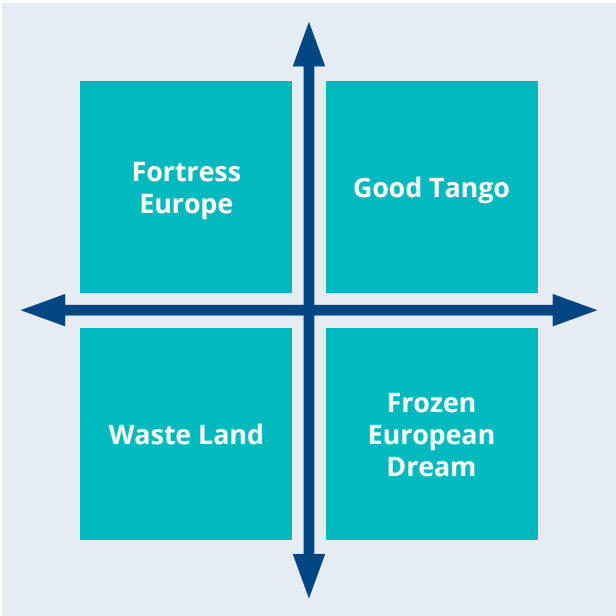
3.3 Portfolio for European Enlargement

The EU's enlargement policy is shaped by a complex interplay of various factors both within the Union and in the potential candidate countries. A key dynamic is the political will of the European Union in relation to the readiness of nation-states to join, which is in turn influenced by its accession criteria. In addition, external factors such as Russia's aggression and nuclear threats, autocratic regimes, migration flows, and foreign interference, significantly influence the EU's enlargement policy by heighten-

The key dynamic of enlargement is the interplay between the EU's political will and the readiness of nation-states to join.

ing security concerns and complicating political decision-making. Moreover, global challenges like climate change and resource scarcity also impact enlargement decisions, as the EU may prioritize candidate countries that contribute to addressing these strategic issues.

Matrix 4: EU’s Political Will to Enlargement (x) and Candidate’s Commitment to Accession Criteria (y)



These identified factors, key drivers and developing plausible projections for each, lead to the creation of distinct portfolios. The following four primary portfolios emerge with regard to 2030:

- 1. **Fortress Europe:** In this portfolio, the EU is unwilling to take in new members or support their reform process, even though candidate countries are eager to integrate. This portfolio illustrates a closed-off Europe focused on internal issues.
- 2. **Good Tango:** Here, candidate countries meet the EU’s accession criteria, and the EU is politically willing to accept them. This positive outcome suggests a smooth enlargement process where both sides collaborate effectively.
- 3. **Waste Land:** In contrast, this portfolio envisions both the EU and candidate countries unwilling to proceed with enlargement. While the EU prioritizes internal problems, candidate countries seek alternative alliances, reflecting a breakdown in mutual commitment.
- 4. **Frozen European Dream:** This portfolio reflects the EU’s commitment to enlargement, but candidate countries fail to implement sufficient reforms. Unable to meet accession criteria, they turn to alternative partners such as Russia or China. Despite the structured nature of the process, enlargement remains stalled.

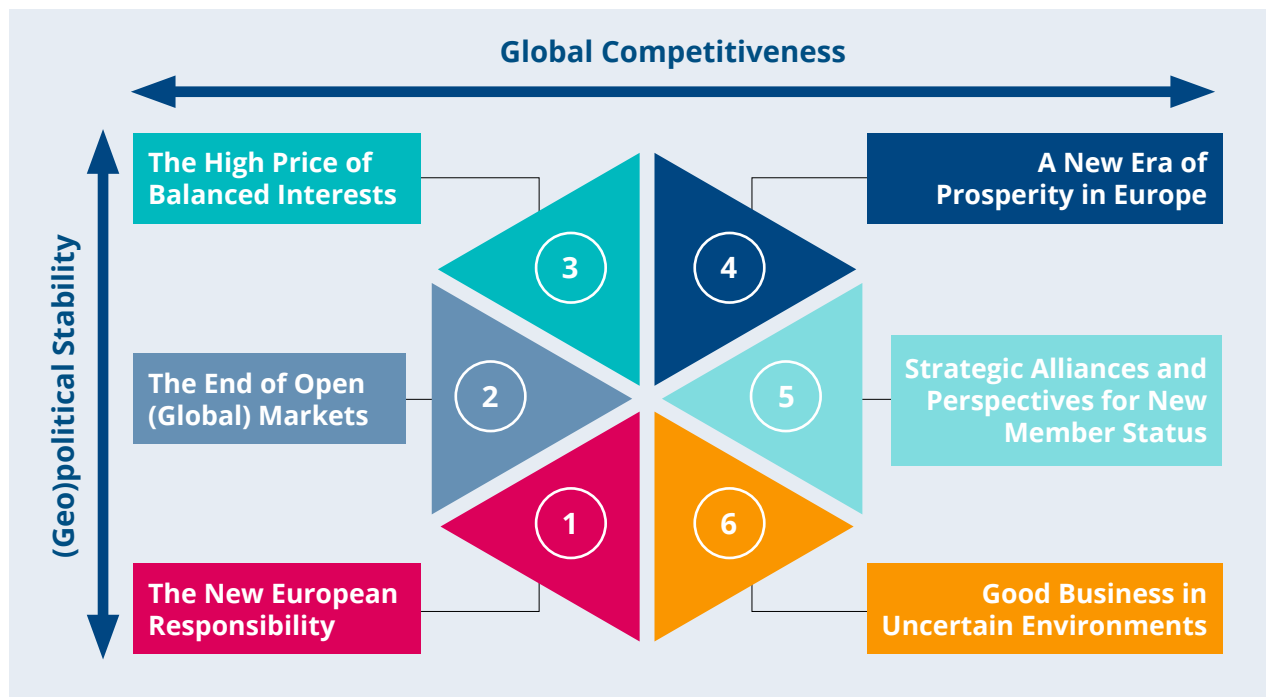
Candidate countries could seek alternative alliances.

4. Scenarios for the EU in 2030

The development of scenarios within the scenario process resulted in six coherent future narratives, positioned along two primary dimensions: Geopolitical Stability and Global Competitiveness. These dimensions were identified as the central axes likely to significantly influence the European Union's trajectory over the next five years. The dimension of Geopolitical Stability reflects the degree of political and economic stability both within the EU and in its global environment. It spans from a stable and cooperative international order to an unstable, conflict-ridden global landscape. The dimension of Global Competitiveness focuses on the EU's economic performance and innovation capacity in the global arena. It ranges from Europe assuming a strong, leading role to a loss of competitiveness relative to other regions. The six scenarios outline distinct yet plausible developmental paths emerging from the interplay of these dimensions. Each scenario provides a consistent vision of how the EU might evolve within a specific geopolitical and economic context. Rather than serving as predictions, these scenarios act as tools for understanding the diversity of possible developments, critically assessing EU strategies, and identifying actionable policy options.

The two primary dimensions are geopolitical stability and global competitiveness.

Figure 2: Results of the Scenario Process



Scenario 1: The New European Responsibility

In this scenario, the European Union faces a world marked by numerous, and at times, intense conflicts. The geopolitical environment is characterized by instability, with persistent tensions and recurring crises demanding significant diplomatic, economic, and military resources. Within this context, the EU assumes a leadership role in conflict resolution, positioning itself as a guarantor of stability and a promoter of peace, both in its immediate neighborhood and on a global scale. The EU's efforts to mediate conflicts and foster peace, however, come at a high cost. Member state governments are tasked with the difficult challenge of prioritizing limited budgetary resources between addressing external conflicts and managing domestic issues. This dilemma exacerbates tensions among member states, as competing interests vie for scarce financial resources. The growing debate over allocating funds to defense and security versus social and economic investments increasingly strains societal cohesion within the Union. Despite these challenges, the EU emerges in this scenario as a global actor defined by its determination and willingness to take responsibility in a fragmented world. Yet, the cost of this leadership is substantial. Internal tensions and constrained financial capacities threaten the Union's long-term competitiveness and stability. This scenario underscores the delicate balance the EU must navigate between fulfilling its international responsibilities and maintaining internal coherence in the years ahead.

An unstable geopolitical environment will require significant diplomatic, economic, and military resources.

Scenario 2: The End of Open (Global) Markets

In this scenario, the European Union finds itself increasingly isolated on the global stage. International markets, once defined by openness and mutual interdependence, are overtaken by protectionist tendencies. Escalating trade conflicts with the United States and China compel the EU to fundamentally reconsider its economic strategies. Globalization, which for decades served as a driver of economic growth and innovation, undergoes a significant reversal. Supply chains are regionalized, and production facilities are relocated closer to home markets. While this de-globalization responds to geopolitical tensions and the pursuit of greater resilience, it also entails substantial costs. Businesses face higher production expenses and reduced access to global markets, significantly eroding the EU's competitiveness. This isolation has far-reaching consequences for Europe's economy and politics. Dependence on the internal market and regional partners grows, as the EU's influence on the global stage diminishes. At the same time, the restructuring of supply chains leads to a stronger emphasis on sustainability and technological independence, potentially creating opportunities for innovation and enhanced regional collaboration in the long term. This scenario depicts an EU navigating a fragmented and protectionist world. The challenge lies in fostering a stable and innovative economic environment despite trade conflicts and geopolitical tensions, while striving to uphold the ideals of openness and international cooperation.

Scenario 3: The High Price of Balanced Interests

In this scenario, the European Union strives to reconcile the diverse interests of its member states and societies without resorting to strict austerity measures. However, this policy of balance requires substantial financial efforts, placing significant strain on public budgets. Instead of financial consolidation, the EU focuses on targeted subsidies for selected industries, particularly in strategic sectors such as technology, renewable energy, and healthcare. The aim is to enhance the EU's competitiveness and reduce regional inequalities. While these industrial policies foster short-term growth and employment, they come at a high cost, creating financial risks in the long run. At the same time, demographic challenges place considerable pressure on the EU's economy. An aging population drives up the cost of pension and healthcare systems, while a shrinking workforce hampers economic development. This creates a dual challenge: ensuring the financial sustainability of social systems while addressing labor shortages critical to economic growth. This scenario portrays an EU attempting to balance social cohesion and economic competitiveness without imposing harsh austerity measures on its citizens. However, the cost of maintaining this balance is significant. Rising debt levels could threaten the Union's long-term stability and limit its political flexibility. Furthermore, it remains uncertain whether this strategy will be sufficient to address the EU's structural challenges sustainably.

Industrial policy can create short-term growth but long-term financial risks.

Scenario 4: A New Era of Prosperity in Europe

In this scenario, the European Union embarks on a new era of prosperity and global leadership. By adhering to shared values and promoting the rule of law, the EU successfully establishes itself as a central player on the world stage. It becomes a model of cooperation, democracy, and sustainability, significantly enhancing its appeal to both citizens and international partners. A key driver of this prosperity is the accession of new member states. Their inclusion not only expands the single market but also generates fresh growth impulses. The integration of these new members is managed strategically and efficiently, ensuring that their potential – ranging from a young, dynamic workforce to innovation capacities – is fully realized. This enhances the EU's economic and social cohesion, while also boosting its global competitiveness. Moreover, the EU effectively addresses the challenges of demographic change. Through a combination of targeted immigration policies, improved labor market strategies, and substantial investments in education and innovation, the decline in the working-age population is mitigated. Strengthened family and social policies further contribute to resolving demographic challenges in the long term, providing a sustainable foundation for growth. This scenario depicts a European Union that leverages its values and strengths to drive global influence while successfully tackling internal challenges. Through a blend of vision, strategic action, and a focus on integration and innovation, the EU becomes a global beacon of prosperity, stability, and social justice.

The integration of new member states can create new growth impulses.

Scenario 5: Strategic Alliances and Perspectives for New Member States

In this scenario, the European Union adopts a strategic approach to solidify its position in a changing world. By building new partnerships with neighboring countries outside the EU, the Union expands its sphere of influence, creating a foundation for long-term stability and economic growth. These alliances are rooted in shared interests in security, trade, and sustainability. A key focus is on securing the supply of strategic goods. In light of global uncertainties and potential supply chain disruptions, the EU establishes close relationships with partner countries that can reliably provide critical resources such as energy, rare earth elements, and high-tech components. This not only enhances the resilience of the EU economy but also advances its drive for technological independence. At the same time, these new partnerships grant access to expanding markets and a young, dynamic labor force. Through targeted trade agreements and investments, the EU creates incentives for sustainable economic development in partner countries, accelerating the accession process for potential new member states. The prospect of EU membership becomes a central tool for driving reforms and promote stability in the Union's neighborhood. This scenario envisions an EU that strengthens both its internal stability and external competitiveness through intelligent strategic alliances. By focusing on partnerships, market integration, and resource security, the Union capitalizes on new opportunities and enhances its role as a global actor. The challenge lies in structuring these alliances to deliver sustainable benefits for both the EU and its partners.

The EU can strengthen both its internal stability and external competitiveness through strategic alliances.

Scenario 6: Good Business in Uncertain Environments

In this scenario, the European Union successfully navigates a world marked by numerous conflicts and uncertainties. While geopolitical tensions and regional instabilities challenge international relations, the EU positions itself as a reliable and stable trading partner. Its ability to ensure continuity and dependability even in turbulent times provides it with a strategic advantage in global markets. The EU focuses on strengthening trade relations with countries seeking stability and long-term collaboration. It effectively deepens existing partnerships and opens new markets, leveraging its reputation as a trustworthy actor to drive economic success in an uncertain environment. A critical element of this scenario is creating favorable framework conditions, such as a capital markets union, that enable investment in strategic technologies. The EU prioritizes innovation in areas such as renewable energy, digitalization, artificial intelligence, and cybersecurity. These investments not only reduce dependence on external influences but also enhance the EU's competitiveness and resilience. Its technological leadership becomes a key factor in securing its global relevance. Despite the uncertain geopolitical landscape, the EU creates an environment that fosters economic opportunities while laying the groundwork for sustainable growth. This scenario depicts a Union that demonstrates reliability, innovation, and strategic foresight, establishing itself as an economically strong and forward-looking player amid global uncertainties.

Summary of the Scenario Analysis

The six scenarios developed within the scenario process provide a broad spectrum of potential future trajectories for the European Union, based on the key dimensions of Geopolitical Stability and Global Competitiveness. Each scenario presents a coherent and plausible vision of how the EU might evolve under different geopolitical and economic conditions.

In a world fraught with conflicts, the EU assumes a leading role in conflict resolution. This requires significant financial and organizational resources, leading to tensions over the prioritization of expenditures. Trade conflicts with the United States and China, coupled with increasing de-globalization, define another scenario. The EU focuses on regionalizing supply chains, which presents challenges to its competitiveness. By avoiding austerity measures and subsidizing selected industries, the EU seeks to ensure social cohesion and economic stability. However, the high cost of this strategy places a significant burden on financial sustainability. Another scenario envisions the EU ushering in a new era of prosperity through global leadership, the integration of new member states, and addressing demographic challenges. Strategic partnerships with neighboring countries secure access to critical resources, open new markets, and establish a foundation for future EU enlargements. In a world marked by conflicts, the EU positions itself as a reliable trading partner, investing in strategic technologies to secure stability and competitiveness.

These six scenarios illustrate diverse developmental pathways and highlight the range of possible futures for the European Union. They reflect the challenges and opportunities arising from geopolitical dynamics and economic trends, providing a framework for better understanding the complexity of the EU's future.

The six scenarios illustrate the spectrum of possible futures for the EU.

5. Policy Recommendations

To navigate toward a favorable scenario and to be prepared for contingencies beyond its control, the EU and its member states need to take bold action both internally and externally. These efforts should primarily address structural challenges, such as managing demographic change, strengthening the internal market, and improving the effectiveness of defense spending in the EU. The following sections provide recommendations for the key issue areas of security, economy, and enlargement.

5.1 Security

In light of escalating geopolitical tensions, hybrid threats, and the ongoing war of aggression against Ukraine, the European Union must embrace a proactive, comprehensive approach to security. To ensure stability and strategic autonomy, the EU should focus on shaping the strategic environment in its favor rather than reacting to emerging threats, which are more demanding, costly, and difficult to manage. Four key strategic priorities are essential for reinforcing the EU's security framework.

- 1. Take Proactive Initiatives for Lasting Stability:** The EU should not only react but must take decisive steps to shape the strategic environment by anticipating challenges and fostering conditions that promote stability and security. Proactive measures will not only reduce the costs and difficulties of crisis management but also safeguard the EU's strategic interests. By demonstrating unity and a firm commitment to shared defense, the EU enhances deterrence and bolsters its ability to respond decisively to evolving threats, ensuring a coherent and credible security framework.
- 2. Secure Energy, Build Resilience:** To reduce dependency on individual and unreliable suppliers, the EU should diversify its energy sources and supply routes while expanding domestic energy production capacity. Simultaneously, critical infrastructure such as energy grids and transport networks must be secured through enhanced physical, cyber protection and coordinated solidarity mechanisms. These measures will mitigate vulnerabilities, ensure resilience, and provide a reliable foundation for the EU's security and economic stability.
- 3. Lead the Way in Technology and Innovation:** Ensuring technological leadership is key to maintaining the EU's competitive edge in a rapidly evolving security landscape. This requires prioritizing investments in emerging technologies, including artificial intelligence, quantum computing, space and advanced defense systems. At the same time, European businesses and research institutions must be protected from intellectual property theft and industrial espionage through stricter

The EU should diversify its energy sources and expand its domestic energy production capacity.

regulations and advanced cybersecurity frameworks, safeguarding Europe's innovation ecosystem.

4. **Join Forces for Collective Security:** Deepening collaboration and mutual understanding of threat perceptions and defense priorities among EU member states and international allies is critical to addressing shared security challenges effectively. By investing in close cooperation with NATO and taking the lead on addressing an array of hybrid threats and challenges, the EU can strengthen collective resilience and extend stability beyond its borders. Enhanced multilateral efforts will ensure a robust and united response to security threats, reinforcing the EU's role as a key actor in global security.

5.2 Economy

Given that low geoeconomic tensions are considered unlikely until 2030, the recommendations focus on the lower half of the scenario map, which is characterized by a geopolitically challenging environment. To transition from scenarios 1 'The New European Responsibility' and 2 'The End of Open (Global) Markets' to 3 'Good Business in Uncertain Environments' and 4 'Strategic Alliances and Perspectives for New Member States', the following recommendations are proposed for the EU's (geo)economic policy:

1. **Speak the Language of Power:** The EU must learn to assert its interests through quicker decision-making, de-risking of critical dependencies, investment screening for narrowly defined risk sectors, and the capacity to impose ready-made counter-tariffs when necessary to reach negotiated settlements.
2. **Targeted Partnerships:** The EU and its member states should intensify their efforts to conclude partnerships on various issue areas, such as trade, investment, migration, and security. Trade agreements should be leaner and concluded only by the EU in order to limit the number of veto players.
3. **Multifaceted Approach on Demography:** The demographic challenge should be addressed through a range of measures, including qualified migration, pension reform, increasing productivity, using the potentials of digital processes and AI, and modernizing public administration.
4. **Strengthen the Defense Industrial Base:** The EU should create a single market for defense goods with more procurement at the European level starting with products such as ammunition. Where possible, the United Kingdom should be included in the development of a truly European defense base.

The EU should be prepared to impose counter-tariffs to facilitate negotiated settlements.

5.3 Enlargement

The EU's enlargement policy is driven by a combination of political will, internal and external factors, and the progress of candidate countries in meeting accession criteria. While the EU must address internal reforms and political barriers, the success of enlargement also hinges on the candidate countries' commitment to implementing necessary reforms. Although the technical requirements for accession are well-defined, the process is influenced by a complex interplay of political and external factors. Taking into account these various factors, the following policy recommendations are crucial for determining the effectiveness of the EU's enlargement strategy:

- 1. Fostering Political Will within the EU:** The EU must actively work to strengthen its internal political will for enlargement. This requires fostering consensus among member states, particularly given the complexity of the unanimity requirement in the Council. Instead of abolishing the unanimity requirement in the Council, the EU should unite by promoting dialogue and cooperation to mitigate the influence of populist or nationalist movements that oppose expansion. Engaging in societal negotiations and ensuring the inclusion of all candidate countries in dialogues across various EU institutions, such as the Council and the European Parliament, are crucial. The EU should also strengthen organized social and civil dialogues at the government level.
- 2. Supporting Candidate Countries in Meeting Accession Criteria:** The EU must continue to provide structured support and resources to candidate countries, focusing on reforms that strengthen democracy, the rule of law, human rights, and market economy development. Monitoring progress closely and enhancing the EU's institutional capacity to integrate new members effectively are essential steps. Ensuring that candidate countries are involved in all relevant dialogues and preparing them gradually for accession will further support their integration.
- 3. Addressing External and Security Threats:** The EU's enlargement policy must account for external threats such as Russian aggression, the nuclear threat, and interference from autocratic regimes. This involves integrating security guarantees and strategies for geopolitical stability to protect both the enlargement process and collective security.
- 4. Balancing Technical and Political Considerations:** A successful enlargement process depends on balancing technical requirements with political realities. While the technical criteria for accession are well-defined, political barriers, such as the willingness of current EU citizens and governments to accept new members, can hinder progress. The EU must streamline its internal decision-making processes and provide clear, transparent communication about the benefits of enlargement to gain public support.

The EU should provide further support to candidate countries in meeting accession criteria.

6. Issue Analysis

In the following chapters, three experts – each representing a group from the workshop – offer essays that delve into specific policy areas. Annabelle Livet examines European security in her essay, *Energy as a Crisis Amplifier: A Strategic Challenge for Security Policy*. Samina Sultan presents her policy recommendations for the European economy in *EU Trade Policy for the Future*. Finally, Lolita Čigāne explores the EU enlargement process in *What Needs to Happen for a ‘Good Tango’ to Come True*.

6.1 Energy as a Crisis Amplifier: A Strategic Challenge for Security Policy

By Annabelle Livet

Crises linked to energy have repeatedly highlighted the vulnerabilities caused by geopolitical volatility. From the two oil shocks in the 1970s, to the gas supply disruptions resulting from Ukrainian-Russian disputes between 2006–2009¹ or through the blackout episodes in Ukraine since 2014², all energy sources (fossil, electricity) can become an aggravating stress-factor in a context of palpable tensions. Since February 2022, energy has once again taken center stage in the Russian war of aggression against Ukraine. Energy producing countries such as Russia have been weaponizing dependencies of the importing countries around the world.³ Alongside diplomatic, informational and other means of hybrid warfare, energy has long been a potent tool for economic coercion. However, Europe, in particular, has seen a growing number of physical assaults on its energy infrastructure. These include both onshore cyber-attacks targeting energy facilities in European ports (2022) and offshore sabotage, such as the attacks on the Baltic Connector and Nord Stream pipelines. Beyond being ‘simple’ territorial threats, those sabotage activities can have major impacts on the European energy system as a whole, not only nationally.⁴ The consequences of a destabilized energy system affect society (especially critical entities like hospitals, water treatment stations etc.), the economy, since companies do not have a constant access to energy, but also the defense system, because energy (fuel and power) are crucial for security and military forces. Thus, energy as a security issue is a civilian-military and technology-neutral topic *per se* with a significant national and European responsibility.

Since February 2022, energy has once again taken center stage in the Russian war of aggression against Ukraine.

Energy policy: a geopolitical matter

Taken as a whole, EU members import around 60 % of the energy they consume from extra-European countries.⁵ The largest dependencies are related to oil, gas and coal to respond to the energy demand of fuel, gas and electricity. This fact underlines the

EU members import about 60 % of the energy they consume from non-European sources.

international dimension of energy policy, which belongs to external policy. Energy dependency becomes a critical matter when the importing country cannot replace it, through alternative supply routes or through other energy sources. The EU is working on both aspects with the diversification principle of the energy partners for the import of fossil energy sources, while decarbonization efforts – notably through more electrification – contribute, to a certain extent, to reducing dependency on asymmetric relations with energy-exporting countries. Since the very large majority of EU members are importing countries, they seek *Unity in the EU* towards a common EU-external energy policy, which contributes to re-balance power relations with the exporting countries in a context of *Great Power Competition*, by giving more weight in the negotiations for energy contracts to certain countries compared to others. As an example, Russia's variable diplomatic and economic relations over gas supply contracts, for instance, towards Germany and Poland, has contributed to diplomatic tensions within the EU.⁶ The 'REPowerEU' and Gas Platform, established by the EU Commission, demonstrate the EU's political commitment to fostering cohesion among its member states. The European Energy system extends beyond EU borders through direct interconnections with neighboring regions. More specifically, for the electricity grid, due to the required harmonization adjustment to EU standards, many Eastern European countries have progressively disintegrated their grids to the former Soviet grid system, in order to shift and connect to the EU grid.⁷ This has been the case for the Baltic States, Moldova, and Ukraine. Some discussions envisage even connecting the EU grid with Georgia and Armenia. These grid shifts are not only steps toward closer ties with the EU but also mechanisms for fostering hybrid peace through increased cooperation, enhancing resilience in both the EU and its neighboring regions. Since February 2022, thanks to an ongoing successful harmonization process starting in 2014 with Moldova and Ukraine, both countries could be synchronized more urgently to the EU grid and stabilized, while the energy infrastructures belonged to the priority targets of the Russian attacks and sabotages. This ongoing stabilization has helped to avoid an energy blackout, which can be considered a major support in war efforts. Ukraine has lost 9 GW of installed power capacity – equivalent to four times the current capacity of the Neurath thermal power plant in the EU. While some countries are currently looking for more imports as part of the decarbonization process, it is important to consider having enough installed energy production capacity to be able to export to interconnected (EU and neighboring) countries and, at least, stabilize their energy systems and avoid any blackout.

The EU requires sufficient installed energy production capacity to stabilize interconnected energy systems.

Energy security: What to protect? From what? And why?

If energy policy is a component of external affairs, its implications and organization are deeply intertwined with domestic policy. Energy supply implies energy distribution – or transportation – which affects the matter of infrastructure. From the energy production units to the consumption points, through conversion stations, energy is a chain linked by a grid, where every element has to be operational to ensure access. Once the energy entities are identified, the latent difficulty is the risk/threat identification and assessment. If energy security corresponds to the guarantee of sufficient and affordable access to energy, every factor that could interrupt the supply falls into this category. A non-exhaustive way to categorize those risks could be to distinguish the hostile activities resulting from geopolitical events (cyberattacks, physical attacks, etc.), from operational/accidental failures that can occur within the system⁸, while also

to take into account the impacts of climate change (extreme temperatures, flooding, tempests)⁹; finally, the (geo)economic risks appear as a limit to the energy market liberalization and the balance-finding over the private (or extra-EU) ownership of specific components of this energy chain.¹⁰

Security and risk assessments rely on subjective perceptions.¹¹ A universal, fully objective, rational way to do this is not really possible, since it depends on the value (or preciousness) one assesses the item to protect; and more importantly, the consequences and costs one wants to prevent. To this extent, energy security policy has similarities with an insurance principle. Energy is the nerve of society that gives the required impulse to drive the number and intensity of the activities (mobility, producing, consuming etc.). Some of them are more existential like guaranteeing the functionality of health infrastructure, digital/telecoms, and military/security installations, which heavily rely on the proper functioning of the civilian infrastructure. Societal resiliency as well as the operational readiness and efficiency of the security system thus relies, among other factors, on the availability of energy.¹² The cost of their failure (or the value of the resiliency and national security system preservation) must guide the assessments of the risk perceptions. This explains the constant focus and engagement of countries like Estonia, Lithuania, Czechia, Poland, Finland, Sweden and France on energy security.¹³

Energy infrastructure has increasingly become a target in conflicts or hybrid threats. For instance, Russia's deliberate targeting of Ukraine's energy infrastructure has been one of the primary methods used to weaken Ukrainian resistance and destabilize the civilian population by disrupting essential services. In response, Ukraine has also focused on attacking energy infrastructure within Russian territory to diminish Russia's capacity to sustain its war effort. These actions underscore the profound impact that control over energy resources and infrastructure can have on the success and longevity of military campaigns, shaping modern warfare strategies.¹⁴ Germany has recently observed an increasing number of incidents related to hostile activities against energy infrastructure, such as a military speed-drone flying over the NPP in Brunsbüttel, the non-conformity of Gazprom Germania (now SEFE) on gas storage management in addition to spying activities for Russia or the sabotage of the Nord Stream pipelines. These recent examples underline the need for physical protection of energy infrastructure as a complement to the cybersecurity domain that has already been addressed. The KRITIS-Dachgesetz as well as the OPLAN DEU (Operationsplan Deutschland) show a rising domestic activism in this matter, albeit it is still too early to assess the effectiveness of these measures, as they are still in the elaboration process.

Energy infrastructure has increasingly become a target in conflicts or hybrid threats.

Efficient coordination needs equivalent national collective awareness

Energy has historically been closely linked to the European integration process, first in the form of cooperation treaties with the European Coal and Steel Community (ECSC) and Euratom, then progressively to more coordination within the framework of the European energy market, to a full Energy Union since 2016. This integration process has been geographically reflected in an increased number of transnational interconnections and a solidarity principle toward other member states.¹⁵ Thus, in the EU, the ability to transfer gas/oil or electricity to another member state is an important pillar

The ability to transfer energy to other member states is an important pillar of crisis management.

for stability and crisis management. This is what was observed in February 2022. Inter-connection provides strength as long as unity and good coordination exist. Specific to the electricity grid, maintaining real-time balance between energy production and demand is critical. Even if work on storage and flexibility systems is ongoing, current risks associated with the loss of significant energy infrastructure would have transnational effects as well. In other words, there is a need for every member state to guarantee the resilience of their energy systems to reinforce the strength and efficiency of the European energy grid systems.

The EU and NATO (according to Article 3) are crucial platforms to coordinate information, best-practice exchanges and elaborate protocols for crisis managements¹⁶ and, to some extent in certain domains, including cyber, and critical infrastructure protection. The more unity the EU achieves on this topic, the stronger the solidarity among its member states can become. If the EU remains in a state of *Polarization*, cooperation could eventually occur under the NATO framework or a multilateral agreement within a *Europe of Nations*. But this could significantly weaken the role of the EU. Without strong cooperation and coordination among the member states, resilience depends solely on the awareness and sovereignty of the country over its territory. With cooperation and coordination, resilience relies on the same aforementioned factors but can be reinforced by solidarity principles as a collective security system, whose efficiency depends on the awareness and engagement of each part. From this perspective, energy is an integral part of a European security and defense architecture with an important civilian-military dimension. As for cross-border defense topics, discussed within the EU and NATO, such as military mobility¹⁷, the protection of energy infrastructure is an essential component to guarantee a level of societal stability and readiness of the security/defense system in a context of geopolitical tension and competition. The outcome and efficiency of the European discussions relies on the engagement, responsibility and awareness of each member state towards such latent topics that are structural for security policies.

6.2 EU Trade Policy for the Future

By Samina Sultan

Trade, both within the Union and with external partners, is a cornerstone of the EU's prosperity. In Germany, for example, one in four jobs depends on exports¹⁸ and Poland's successful integration into European and global value chains enabled its rapid development after the fall of the Iron Curtain.¹⁹

However, the recent performance of EU trade policy has been rather disappointing. This is reflected above all in the fact that the EU has only been able to conclude one new free trade agreement in recent years, with New Zealand. While the political negotiations with the Mercosur countries about a free trade agreement have been completed, it took nearly 25 years, and its implementation still depends on the approval of both the Council and the European Parliament. Meanwhile, negotiations with Australia have been suspended. Moreover, our import dependency on China for potentially critical goods has hardly decreased.²⁰

With geopolitical tensions on the rise, not least since Russia's war of aggression against Ukraine, the EU must prepare itself for increasing economic decoupling and adjust its trade policy accordingly. Trade conflicts between the US and China are likely to intensify. President Donald Trump has appointed Marco Rubio as Secretary of State and Mike Waltz as National Security Advisor, who are both considered China-hawks. While the transatlantic trade relationship proved to be remarkably resilient during Trump's first term in office²¹, it is likely to come under greater stress in his second. Particularly his goal of reducing the US trade deficit and his threat to impose far-reaching import tariffs of up to 20 percent or more, including on EU imports, would be damaging on both sides of the Atlantic.²² If the EU decides to retaliate and the situation escalates into a transatlantic trade war, Germany's level of GDP could decrease by up to 1.5 percent, but the US would also suffer.²³ Meanwhile, China has lost no time in positioning itself as an attractive – and less demanding – alternative trading partner to the EU in the global South, in order to secure its access to strategic resources, for instance in Latin America.^{24 25}

The EU must prepare for growing economic decoupling and adapt its trade policy accordingly.

In light of this, what should be the priorities of the future EU trade policy?

1. The top priority for EU trade policy should be to expand its network of free trade partners. In this respect, there are still many white spots on the map, especially in South America and the Indo-Pacific region.²⁶

The top priority for EU trade policy should be to expand its network of free trade partners.

Why are free trade agreements so important?

a) We need to build resilience: During the pandemic, we realized how vulnerable we are if, for instance, masks are sourced from only a few retailers. It is therefore important to diversify through free trade agreements instead of trying to reshore all production back to Europe. Isolation does not lead to greater resilience – on the contrary, it reduces it.

b) We need free trade agreements to master the green transition: First, as a sales market for the green tech products of European companies; second, to secure access to key raw materials needed for the green transition; and third, free trade allows for greater economies of scale and efficient use of resources, which would also be in line with the green transition.

c) And we need free trade agreements in view of the geo-economic situation, which makes de-risking indispensable, especially vis-à-vis China.

As we strive for diversification, we should not define possible partners too narrowly in the sense of geopolitical friends only. Otherwise, this could run counter to the concept of de-risking by unnecessarily reducing the number of countries we can trade with.

There are three main reasons why the EU trade negotiations in the recent past have failed. First, the EU's increasing focus on norms and sustainability has overburdened trade agreements. Second, our trading partners, for instance in the Indo-Pacific region, have become more assertive and protective of their own industries. Third, there are agricultural concerns, as EU farmers could face higher competition from abroad.

The EU's increasing focus on norms and sustainability has overburdened trade agreements.

The following approaches could enable the EU to overcome these issues:

- › The EU needs to rethink its strategy for all-encompassing deals that not only include chapters on trade, but also on topics ranging from climate to gender. Instead, a focus on more targeted trade-only agreements is vital for successful negotiations. This would also help to reduce administrative hurdles in the EU. Alternatively, mini-deals or trade agreements focused on strategic supply chains could be an option.
- › To entice partner countries to open their markets, the EU should offer to promote European investment in these countries to help build up their industrial capacities. A template could be the agreement between the EFTA countries and India, in which the EFTA countries have committed to invest 100 billion USD and create one million jobs in India over a period of 15 years. It needs to be stressed, though, that these commitments do not amount to an investment agreement, as this would run counter to the need to keep agreements targeted on trade.
- › On the one hand, concerns of European farmers must be taken seriously. Therefore, it is appropriate that, for example, the EU-Mercosur FTA includes import quotas and transition periods for agricultural imports, such as beef, so that imports into the EU do not increase substantially compared to the status quo. To further address their concerns, a fund to compensate farmers for negative impacts of FTAs would be a promising approach. Moreover, the benefits for the agricultural sector should be emphasized more strongly. For example, wine, chocolate and dairy products currently face high import tariffs in Mercosur countries. These would be removed if the FTA is concluded. Thus, also French wine and cheese makers stand to win. On the other hand, agricultural concerns ultimately must be weighed against broader geopolitical considerations. The new EU trade strategy must give precedence to the latter.

2. A level playing field is a key prerequisite for trade to flourish. However, the World Trade Organization (WTO) and the rules-based trade order are at least partially dysfunctional for several reasons. One goal of the EU trade policy should therefore be to stop the WTO's further demise. A first step in this direction could be a reform of the WTO subsidy rules in order to tackle global economic distortions, particularly those emanating from non-market economies.²⁷

At the same time, however, EU trade policy needs to be defensive. It is therefore legitimate for the EU to examine the extent to which action can be taken against non-market players that severely distort global competition. The European Commission's anti-subsidy measures against Chinese electric vehicles are therefore justified from an economic perspective.²⁸ At the same time, the European Commission's two-pronged 'carrot-and-stick' strategy towards Donald Trump's tariff threats is appropriate. Ideally, by buying more US LNG or military equipment, a transatlantic trade war can be forestalled. But *Realpolitik* requires the EU to back this up with credible retaliatory measures. Moreover, with the anti-coercion instrument, the EU now has a tool that provides a framework for possible retaliatory measures in the event of economic coercion by a third party.

The European Commission's anti-subsidy measures against Chinese electric vehicles are justified.

3. Finally, a trade strategy should not undermine our sustainability goals. The question is how to achieve this. With harsh EU-imposed conditions on potential partners – especially sanctions for non-compliance – progress is unlikely. The dispute over the EU-Mercosur Free Trade Agreement is a case in point. On the contrary, such a strategy torpedoes the primary objective of a free trade agreement, which is to increase trade. Instead, it only comes back to bite us, as in effect, it forfeits the implementation of any sustainability standards.

Another approach that was frequently used under the previous European Commission were unilateral measures, such as the EU Regulation on Deforestation-free Products or the Directive on Corporate Sustainability Due Diligence – a dozen such unilateral measures can be counted in the area of sustainability alone.²⁹ This approach was met with massive resistance in the respective partner countries, which condemn it as protectionist, discriminatory and patronizing. The European Commission's proposal to postpone the application of the EU Regulation on Deforestation-free Products by one year is therefore a step in the right direction.

For political reasons, it is unlikely that trade agreements can completely ignore sustainability issues. In order to square the geopolitical need for more trade agreements with sustainability concerns, the EU should not insist on sanctionability but address the issue in a more cooperative way. This means, first and foremost, negotiating on an equal footing and recognizing partner countries' approaches to sustainability. Secondly, the EU must also be willing to assist partner countries to be able to implement more stringent sustainability requirements.

The EU should not insist on sanctionability of sustainability standards in trade agreements.

6.3 EU Enlargement – What Needs to Happen for a 'Good Tango' to Come True

By Lolita Čigāne

Scenario planning is particularly useful because it allows one to concentrate on the main factors influencing certain processes, and calls for filtering out the ones that are less pertinent, even though initially they seem crucial. Planning possible EU enlargement scenarios, one goes through exactly this process, which often leads to surprising results. Indeed, the EU enlargement has been highly influenced by social, historical and geopolitical factors – think of the collapse of the Berlin Wall in 1989 and subsequent unification of Germany – rapid EU enlargement incorporating the former communist GDR, or, for instance, Sweden, Finland and Austria joining the EU in 1995 as a result of the end of the Cold War. Another example is of course the big bang enlargement in 2004 with eight former Communist countries joining the EU thirteen years after the fall of the Iron Curtain.

The EU's enlargement has been strongly influenced by social, historical and geopolitical factors.

However, when the scenario planning for EU enlargement is boiled down to the two most crucial factors, the real deal breakers are political will, determination and commitment to enlargement on behalf of the EU, and commitment to EU integration and seriousness about the implementation of reforms on behalf of candidate states.

For instance, after Croatia joined the EU in 2013, even though the world was much more peaceful than it is today, there was talk of enlargement fatigue, and no signifi-

cant push for further Western Balkan integration followed.³⁰ The lukewarm policy of Eastern Partnership was launched in 2009 on the initiative of Poland and Sweden, but this did not constitute a serious enlargement drive.³¹ At the same time, with Russia's full-scale attack against Ukraine in 2022, the EU enlargement process was revived.³² Ukraine, despite having its Eastern territories under Russian occupation and the entire country being under a constant threat of Russian missile attacks, received not only EU candidate status (June 2022) but also officially started EU accession negotiations (June 2024).

When predicting EU enlargement scenarios, the most important factors really are EU's commitment to enlargement and candidates' commitment to enlargement and reforms. When these two factors are combined, several scenarios emerge. The most desirable scenario is the so-called 'Good Tango', as there is a strong commitment by the candidate states in combination with the EU's willingness to accept them. However, it is never that clear cut. Being under full-scale aggression, Ukraine could commit to the reforms necessary for EU accession mostly in words. Notwithstanding this, the EU collectively decided to fast-track Ukraine's accession process.

The most desirable scenario is a strong commitment by the candidate states in combination with the EU's willingness to accept them.

The previous and upcoming enlargements have always been, and will always be, a search for an equilibrium between various factors influencing all scenarios. Also, in terms of the time, each country is on an individual path. For instance, Georgia received EU candidate status in December 2023, mostly because of the EU's enthusiasm of the Georgian society.³³ However, since then there has been a serious backsliding in Georgia's commitment to reforms, particularly after the final adoption of the so-called 'foreign agent law' which enforces Russian-style suppression of civil society by cutting off a crucial lifeline – funding from outside Georgia for civil society work, including the monitoring of freedom and fairness in the 2024 parliamentary elections.³⁴

This draws attention to a very important aspect of the enlargement policy – to be accepted as a member, the EU candidate must be ready for EU membership. Geopolitical and geostrategic considerations alone are not enough. Most importantly, the country must be ready to adhere to the rule-of-law standards of the EU.

Geopolitical and geostrategic considerations alone are insufficient for enlargement.

This dichotomy between willingness and readiness is well illustrated by a remark from a Moldovan MP at the Riga Summit in May 2015. The MP compared their country's commitment to the EU to offering their love, only for the EU to respond by measuring their heart rate.³⁵ This metaphor encapsulates the frustration often experienced by accession countries, as the EU can seem like a forever moving target.

However, the observance of the rule-of-law principles can indeed be compared to the EU's heart function, crucial to keep the EU body alive. Observance of the rule-of-law principles is the guardian of the EU's Single Market that ensures its functioning. For this to happen, an independent judiciary that upholds EU values and laws is of crucial importance. This also refers to the trust that countries have sufficient anti-corruption mechanisms to safeguard the substantial investments of the cohesion policy – regional solidarity policy that creates a more equitable and equally developed single market, especially in poorer member states. The West Balkan states and also Moldova and Ukraine, once they join, will qualify for EU cohesion policy, just like the former

Soviet republics and Communist states of the 2004 Big Bang enlargement have. For these policies to be beneficial, the funding must not end up in corrupt schemes.

The current EU enlargement drive, in response to Russia's full-scale aggression against Ukraine, is primarily a geopolitical move – the EU Commission in 2023 stated that 'EU enlargement is a driving force for long-term stability, peace and prosperity across the continent'.³⁶ However, it cannot and should not fail to recognize that the lack of rule-of-law in EU candidate countries may create serious tensions within the EU once the new candidates enter.

Fulfilling the rule-of-law criteria in EU candidate countries is crucial.

This previous fragility – the belief that once a full-fledged EU member state, a country would act responsibly, has already been seriously tested by the measures adopted by Poland and Hungary that undermine(d) the independence of democratic institutions, primarily the judiciary and media.³⁷ In response, in 2020, the EU launched a rule-of-law mechanism that evaluates the state of rule-of-law also in EU member countries – the justice system, the anti-corruption framework, media pluralism. Recognizing the dangers of absence of rule-of-law for the whole EU, the rule-of-law criteria for candidate countries have also been strengthened. This has constituted an evolution from the initial broad Treaty clause 'any European State, which respects the values referred to in Article 2 and is committed to promoting them may apply to become a member of the Union'³⁸, to the current much more elaborate assessment criteria.³⁹ Notably, a 'larger Union requires greater self-discipline [...] and greater multilateral surveillance to prevent the actions of one member state from undermining the benefits of membership for the rest'.⁴⁰

Sometimes EU candidate countries argue that this set of elaborate criteria is impossible to fulfill, that many EU member states do not fully comply with these criteria themselves, and that the decisions will ultimately always be political. Undeniably, there is a degree of subjectivity in the process by which the EU accepts new members. This is largely because of the nine general stages of EU accession, several require unanimous vote, meaning all EU member states have to agree.⁴¹

The fact that, for instance, North Macedonia's accession to the EU has been blocked by its neighbors due to the unanimity requirement, despite North Macedonia's demonstrated readiness, is well known and well documented.⁴² In general, the EU accession process would of course benefit from depoliticization, at least by easing the necessity for crucial stages of the enlargement process to be approved by unanimity. However, EU candidate countries must be developed democracies and market economies, able to meet the requirements of membership without undermining the EU from within. The principle of the rule-of-law is the core guardian of EU member states. It protects smaller states from asymmetrical dominance of larger ones, confines the political and economic clout of the large member states, incentivizes them to collaborate and listen to the voices of smaller member states, but also guards the whole system from tyranny of small manipulative minds. The EU, as a highly complex organism, can only sustain and develop if its rules-based foundation is maintained.

Depoliticizing the EU accession process would be beneficial.

By accepting rogue players who could potentially endanger this balance (and have done so, as experience shows) is therefore dangerous for the EU. Unfortunately, the situation with the rule-of-law among candidate states is far from perfect.⁴³

So, a lot of thinking, work and tailored assistance must be invested by the EU to incentivize candidate countries to reform, even against all the incredible odds that, for instance, Ukraine is now facing with an outright brutal war from Russia. Unfortunately, this is not the only war Russia is waging against peace and prosperity in Europe. Moldova, an EU candidate country since 2023, officially negotiating membership since June 2024, is under constant, brutal meddling in its politics⁴⁴ and various incidents of sabotage, cyberattacks, arson and similar acts by Russian state and non-state actors have become frequent occurrences in Europe.⁴⁵ However, if both sides succeed despite all odds, a 'Good Tango' scenario would have immense potential to create a peaceful and prosperous European continent, just as envisioned in the now dream-like 2004 EU peace and security strategy.⁴⁶

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