Futures of the Western Balkans 2043

Aspen Western Balkans Initiative
Engagement for Progress and Stability

Aspen Institute Germany

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1. Introduction: Futures of the Western Balkans 2043

Since 2016, the Aspen Institute Germany has been conducting strategic foresight workshops on the future of the Western Balkans with experts from the region. In all these scenario processes the guiding question and analytical framework remained the same: While the Western Balkan Six (WB6), with different speeds, have embarked on an EU accession pathway, how do global and regional trends and the interaction of intra- and extra-regional actors affect the region's development?

Looking back onto the past eight years of Aspen Germany's scenario work, the trajectory of these change factors is obvious. Even though the conflict between Greece and North Macedonia has been resolved, there is not much progress in resolving the spat between Serbia and Kosovo, not to speak of separatist tendencies of the Republika Srpska which challenges the regional peace framework under the Dayton Agreement.

With the United States focused on China and pre-occupied with its upcoming presidential elections, it is doubtful whether it is still a reliable guarantee power to keep peace and security in the Western Balkans. The EU continues to approach the Western Balkans with a crisis-management attitude aimed at containing security and migration threats, sometimes at the expense of reforms which could catalyze long-term progress. Meanwhile, an aggravated geopolitical and geo-economic contest between global and regional powers risks turning the Western Balkans into a potential bridgehead for those powers who want to destabilize Europe and widen their influence in the region.

With the EU accession process stagnating, hopes to become full EU members soon are dwindling in the region. Instead, somberness and EU fatigue dominate the public discourse in the region, particularly since Ukraine and Moldova (also for geo-political reasons) became candidate countries shortly after they had applied for the status. Internal consensus to pursue reforms in Western Balkan countries has weakened accordingly, as the "pull factor" of EU membership has slipped further from view and countries have not always benefited from assuming the costs of aligning with EU standards and policies. Despite these disappointments, polls show that most people in the Western Balkans still favor EU membership.[1]

Driven by the likelihood that EU enlargement will still take some time, Western Balkan citizens are increasingly joining the EU through migration. As a result, Western Balkan countries suffer from continued brain drain and declining tax revenues. Since 1990, the stock of migrants from the region has doubled, reaching almost 4.8 million in 2020 with the biggest stocks originating from Albania, Bosnia and Herzegovina, and Serbia. Meanwhile, more nationals of Bosnia and Herzegovina live abroad than in their country of origin.[2] If current trends persist, the whole region will face massive depopulation. For Serbia, scenarios project a total population of about 5 million in 2060 (compared to 7.1 million in 2023); if out-migration continues at current rates, the worst-case scenario even suggests a drop to 3.9 million.[3] Hence, by mid-century, more people from the Western Balkans could live abroad than in the region. The chance to find better opportunities through migration to the EU

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1   Center for Insights in Survey Research, 2022 Western Balkans Regional Survey | January-February 2022, International Republican Institute, June 29, 2022, https://www.iri.org/resources/2022-western-balkans-regional-survey--january-february-2022/ (accessed September 14, 2023).

2   United Nations Department of Economic and Social Affairs, Population Division, International Migrant Stock, 2020, https://www.un.org/development/desa/pd/content/international-migrant-stock (accessed September 16, 2023).

3   Goran Penev, "Population Ageing Trends in Serbia from the Beginning of the 21st Century and Prospects until 2061: Regional Aspect," in: Zbornik Matice srpske za drustvene nauke, no. 148, 2014, 687 – 700.

has reduced the "push factor" prodding leaders toward reform, as many dissatisfied citizens leave and then send substantial remittances, thereby reducing demands on domestic economic and government performance.

Meanwhile, global trends such as climate change, mass migration from the Middle East and Northern Africa (MENA) region, the Sahel, and Sub-Saharan Africa are negatively impacting the region's prospect for sustainable livelihoods. At the same time, the economies of the Western Balkans are unable to keep pace with the rapidly advancing digitalization and automation of the prospering economies, widening the gap in economic competitiveness. Insufficient state capacity and state capture by private interests has significantly undermined the ability of Western Balkan societies to adapt to a rapidly changing world. At the same time, foreign powers can foster instability in the Western Balkans to exert influence on an already disunited European Union (EU), which further interferes with efforts to anticipate or benefit from global transformations (especially Russia, China, Turkey, and the Persian Gulf monarchies).

Against the backdrop of this rather bleak outlook, 24 experts from the region gathered for a strategic foresight workshop on July 5 – July 6, 2023 in Berlin. The following report summarizes the scenarios they developed, the discussions they had, and the findings and policy options they presented in four different policy fields: social cohesion, climate and energy policy, peace and security, and prospects to enhance the EU accession process.

Please note that this summary only provides a collection of points raised by conference participants and is not to be understood as a joint conclusion. Furthermore, these results do not reflect the positions of the Aspen Institute Germany or the German Federal Foreign Office.

2 Megatrends, Driver of Change, and Weak Signals of Change

To analyze how the dynamics of change affect societies, strategic foresight splits the future into three time horizons – the *imminent future*, the *next futures*, and the *far futures*:

- The *imminent future* is the foreseeable future which spans three to five years ahead. It is pre-defined (hard-wired) by past decisions and can only be changed through disruptive events or sudden path changes (wild cards). Hence, the imminent future is defined by a low level of uncertainty.
- *Next futures* are visions of desired outcomes (or futures) or the emergence of unplanned futures. Their actual appearance is dependent on the interplay of megatrends, key drivers of change, key actors, and resource allocation. Due to their intense interaction and feedback loops, next futures cannot be predicted, they inherently bear a higher level of uncertainty than the imminent futures.
- *Far futures* refer to long-term trajectories (20 to 50 years). They are dependent on the outcome of next futures, the interplay of megatrends, and yet unknown innovations and new actors. Hence, far futures are characterized by a high level of uncertainty.

Strategic foresight not only distinguishes between different futures or time horizons, it also categorizes different types of change factors – *megatrends*, *drivers of change*, and *weak signals of change*:

- *Megatrends* often take decades to become established and prove to be robust in the face of shocks or setbacks. They permeate all societies and areas of life, and they last for several decades (which distinguishes them from more timely limited trends or fashions). Megatrends often only develop their full impact and penetrating power in their interaction – they form megatrend clusters.
- *Drivers of change* (or trends) are more limited factors of change. They are often timebound, limited to specific regions, societies, economic sectors, or societal groups. Ordinary drivers of change do not develop into global or megatrends but are superseded by new drivers of change. Their lifespans are limited and rarely last a generation.
- *Weak signals of change* are emerging factor of societal change. Their impact and reach are not yet fully understood but their early detection improves the ability of societies to anticipate and mitigate upcoming risks and to identify and exploit emerging opportunities at an early stage. However, distinguishing weak signals of relevant change from meaningless noise can be challenging.

Aspen Germany's "Western Balkans Future 2043" aims at looking beyond the immediate future to better grasp possible endgames of current developments. This is why a 20-year time horizon was picked, knowing that technological, geo-economic, political, and value systems which are in flux today will take years to fully impact Western Balkans societies. When considering the challenges facing the Western Balkans, understanding the long-term implications of potential developments is essential to advancing solutions which are adaptable and relevant.

Megatrends, Drivers of Change, and Weak Signals impacting the Future of the Western Balkans within the Next Ten Years

Results from an online survey among the 26 participants of Aspen Germany's "Western Balkans Futures 2043" process.

Overarching Megatrends	Social Drivers and Weak Signals of Change	Technological Drivers and Weak Signals of Change	Economic Drivers and Weak Signals of Change	Security-related Drivers and Weak Signals of Change
• Climate change/green transition/nexus climate change and security • Demographic change: migration, brain and muscle drain/de-population • Digitalization, automation, AI-regulations and geopolitics of tech innovation • Geopolitical change: system rivalry, shift in security environment • (Geo-)economics, de-globalization and regionalization, (in-)equality	• Demographic change/brain drain/migration • Education and media literacy • (In-)equalities and social cohesion (socio-economic, gender, ethnicity) • Access to and availability of social services • Political polarization, social movements • Tech development, impact of digitalization on democratic institutions and processes	• Digitalization/automation/AI: regulation, job loss, surveillance vs. transparency • Research and development (R&D)/investments • (Critical)-infrastructure, malign influence of Russia and China and infrastructure development • Skills/IT literacy, deepening social inequalities • Energy systems/green transition/R&D/public sector lagging behind	• Political economy (social contract) • Geo-economic shifts (de-globalization, regionalization) • Economic integration/trade agreements • Competitiveness • Infrastructure • Investments • Economic security/critical infrastructure • Supply chains • Digital turn/automation • Labor force/migration/brain drain • Tourism	• Regional conflicts/security environment • Threat perception/armament build-up • Global rivalry spill-over/projection • Full region part of the North Atlantic Treaty Organization (NATO) (Art. 5)/EU security structures • Political radicalization • Organized crime/(state)-terrorism • Hybrid warfare/cyber security

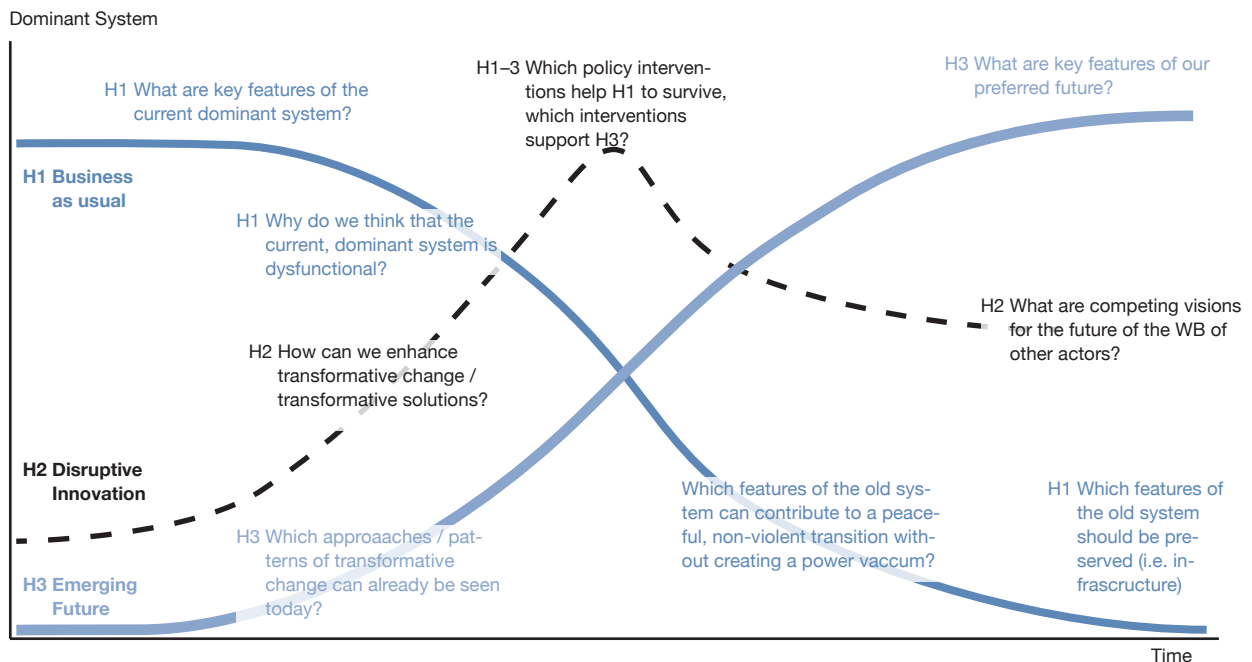| Political Drivers and Weak Signals of Change	Legal-Regulatory Drivers and Weak Signals of Change	Ecological Drivers and Weak Signals of Change	"Soft" Drivers and Weak Signals of Change
• Poor/good governance/lack of reform • EU integration • Geopolitics/power rivalry/global order • Regional dynamics • Political culture/polarization	• Rule of law • Balance of power, constitutional issues, electoral systems, de-centralization • EU integration, normative frameworks • Fragile state, dysfunctional states, performance of public administration • Corruption, state capture • Regional cooperation • Global governance, world order	• Climate change • Green transition (or lack of…) • Energy security • Water security • Strategic resources • Deforestation • Pollution of natural resources • Green social movements • Weak public management	• Misinformation/disinformation • Mindsets, populism, nationalism, xenophobia, polarization • Religion • Foreign influence in the region • Gender dynamics • Regional collaboration projects; interpersonal connections, social movements

3   Applying the Three-Horizons Methodology

In future studies, it is often seen how persistent and resilient dysfunctional systems are in the face of change. The reason for slow progress is often the invisibility of actors and sub-systems which profit from the status quo and the lack of incentives and the systemic nurturing of more functional solutions.

Working with the so-called "Three Horizons Methodology" is a useful way to think beyond current obstacles and hard-wired systems to detect "seeds of the new" in today's world that can be used as catalysts for systemic change and a more sustainable future. The methodology enables analysts to think simultaneously in three different time horizons – the short, medium, and long term.

Depending on the speed of change in different sectors of societies, the three horizons may cover a span of ten years (social acceptance of technological change for instance), in others they may span half a century (e.g., values and collective principles as part of a society's default system that necessitates multiple generations to change). In other words, qualitative and structural change is more significant for strategy thinking than the actual span of time. In the context of the Aspen Germany Foresight Process a 20-year time horizon was deliberately chose knowing that this is far beyond timespans of political planning.

Political Entrepreneurship / Intervention to enable transformative change

Dominant System

H1 What are key features of the current dominant system?

H1–3 Which policy interventions help H1 to survive, which interventions support H3?

H3 What are key features of our preferred future?

H1 Business as usual

H1 Why do we think that the current, dominant system is dysfunctional?

H2 How can we enhance transformative change / transformative solutions?

H2 What are competing visions for the future of the WB of other actors?

H2 Disruptive Innovation

H3 Which approaaches / patterns of transformative change can already be seen today?

Which features of the old system can contribute to a peaceful, non-violent transition without creating a power vaccum?

H1 Which features of the old system should be preserved (i.e. infrascructure)

H3 Emerging Future

Time

How to apply the Three Horizons Methodology? Societal change is viewed as a sequence of paradigm shifts and ways to bring them about. As described by Joseph Schumpeter, who coined the term "creative destruction,"[4] the old is being constantly replaced by the new through entrepreneurial interventions. The art of political innovation is to replace old, dysfunctional systems before their negative impacts supersede their usefulness, which inevitably leads to social discontent, economic downturn, and unrest.

In the Three Horizons Methodology, *the First Horizon* (H1, dark blue line in graph) is the dominant system at present. It represents "business as usual" or the status quo. These systems are relied upon to be stable, reliable, and able to deliver. But as the world changes, so aspects of our default systems begin to feel out of place or no longer fit for purpose. Eventually business as usual will be superseded by new ways of doing things.

Questions to test the timelines of the dominant system are:
- What are key features of the current system?
- Is the current, dominant system dysfunctional?
- Which features of the old system can contribute to a peaceful, non-violent transition without creating a power vacuum?

The Second Horizon (H2, black dotted line in graph) is a pattern of transition activities and innovations. People are trying things out in response to shifts in the underlying landscape. Some of these innovations will be taken up by H1 systems to prolong their life while some will pave the way for the emergence of the radically different H3 systems.

Some of the questions being worked with to develop interventions for progressive change are:
- How can transformative change and transformative solutions be enhanced?
- Which (policy) interventions help system H1 to survive; which (policy) interventions support system H3?
- What are competing visions for the future from other actors?

The Third Horizon (H3, light blue line in graph) emerges as the long-term successor to business as usual. It grows from fringe activity in the present and introduces new ways of doing things which are better fitted to address current or future challenges than the dominant H1 systems. These early manifestations of more functional solutions are called "seeds of the new."

Some of the questions to uncover these fingerprints of systemic change are:
- What are key features of our preferred future (visioning)?
- Which approaches or patterns of transformative change can already be seen today?

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4   Joseph Schumpeter, Theorie der wirtschaftlichen Entwicklung, Berlin, 1912, 157.

4 Western Balkans Futures – Scenario Space

4.1 Social Cohesion – From Depopulation to Resurgence

Since the 1990s, the Western Balkans (WB) are experiencing massive emigration. In 2018 alone, 230,000 people left the region, mostly originating from Albania and Bosnia and Herzegovina (BiH).[5]

Many émigrés are highly skilled. What this brain drain means for the functioning of WB societies is best illustrated by the example of the health sector. Responding to demand from wealthy and aging societies in northern Europe (mainly Germany), health workers from the WB are leaving the region in huge numbers. In the case of Albania, expatriate health workers accounted for nearly one-fifth of the total health workforce in 2017, up from seven percent in 2010. Of the 4,600 foreign nurses who came to Germany the same year, almost one third were from the Western Balkans.[6]

In addition to the shortage of health workers, there is also a shortage of skilled workers for repair, maintenance and construction work, with the result that the cost of these services in the WB region is rising due to increased wages for the remaining skilled workers.

This massive outflux of skilled workers has led to a shadow economy. Remittances account for roughly 9 to 16 percent of the Gross Domestic Product (GDP) (only North Macedonia being below the 3% threshold), and they now serve as the de facto social security network for societies in the region.[7]

Young, well-educated, and skilled people are at the center of emigration from the WB6. According to a Friedrich-Ebert-Stiftung (FES) report, some 50 percent of youth want to leave the region to improve their quality of life.[8] Historically, youth predominantly left the region for better salaries and jobs, but today they are increasingly leaving for a higher quality of public services, education, healthcare, good governance, or environmental reasons.

Given current trends, migration experts assume that the region will lose around one million youth in the forthcoming decade, worsening the already bleak outlook for political reform and economic prosperity in the region. Though WB6 elites complain that brain drain hurts their economic prospects, some suggest that outbound migration is in the interest of corrupt private interests. Discontent youth leaving the country are no longer protesting in the streets for reform or challenging state-capturing by elites.

At the same time, the region must deal with constantly rising inbound and through-bound migration. Between 2018 and 2022, numbers almost quintupled, with Serbia bearing the brunt with more than 120,000 arrivals in 2022 (63% of all arrivals).[9] While most migrants are heading northward, those who stay change the social and economic fabric of WB societies.

5   Alida Vračić, "Can Europe Help the Balkans Keep its Young Emigrants?," in: Balkan Investigative Reporting Network, October 7, 2019, https://balkaninsight.com/2019/10/07/can-europe-help-the-balkans-keep-its-young-emigrants/ (accessed September 15, 2023).

6   Valeska Esch et al., Emigration from the Western Balkans, Aspen Institute Deutschland e. V., 2020, https://www.aspeninstitute.de/wp-content/uploads/2020-Emigration-from-the-Western-Balkans.pdf (accessed September 15, 2023).

7   Lisa Andersson et al., Labour Migration in the Western Balkans. Mapping Patterns, Addressing Challenges and Reaping Benefits, OECD, 2022, https://www.oecd.org/south-east-europe/programme/Labour-Migration-Western-Balkans-FINAL-WEB.PDFO.pdf (accessed September 5, 2023).

8   Felix Henkel, Youth in Southeast Europe Demand a Decent Future!, Friedrich Ebert Stiftung, 2019, https://library.fes.de/pdf-files/bueros/sarajevo/15552.pdf (accessed September 6, 2023).

9   Nikola Kovačević, Serbia Country Report. Overview of the Main Changes since the Previous Report Update, Asylum Information Database (AIDA), https://asylumineurope.org/reports/country/serbia/overview-main-changes-previous-report-update/ (accessed September 16, 2023).

This is particularly true for Montenegro that is now home to thousands of Turkish migrants who fled the failed 2015 coup in their home country. With them came many entrepreneurs, according to data for the first half of 2018, Turkey is now the fourth largest foreign investor in Montenegro. As of 2022, 3,200 companies of Turkish origin are registered in Montenegro which make up one-third of all foreign registered companies.[10] Investments in strategic sectors such as energy, infrastructure, banking, agriculture and other important areas like tourism and forestry have raised concerns, though, as Western Balkan economies become more dependent on foreign interests.

Still, Montenegro has become something of a positive case study for the WB6. As the North Atlantic Treaty Organization (NATO) member and an advanced EU candidate with a free trade agreement with the bloc, Montenegro already has access to some of the benefits of European integration. It has also tapped into other markets through trade agreements with Russia (before the Russia's aggression against Ukraine), Turkey, and Ukraine, as well as memberships in the Central European Free Trade Agreement (CEFTA) and preferential trade relations the European Free Trade Association (EFTA). This is why the country is now seen as a "Gateway to the Balkans" and could be a positive example of a viable alternative to full EU membership.

Yet, compared to the massive brain and muscle drain, not only university-educated but also skilled craftsmen are leaving the region and these uplifting examples are the exception.

The dilemma, the EU is rather part of the problem than its solution. With the Stabilization and Association Agreement allowing WB citizens to enter the European job market and Germany actively recruiting skilled workers in the WB, people vote with their feet. By the time the region's integration into the EU will be completed (likely after 2030), a large portion of its inhabitants will already be settled elsewhere. All this feeds a vicious circle, al-

ready low birth rates will further drop, and the already high average age of WB population will soon scratch the 50-year mark.

This bleak outlook notwithstanding, two scenarios were again developed, a business as usual/slippery slope scenario which reflects the above analysis and a progressive scenario that exploits new trends and expands on today's weak signals of positive change. These scenarios were called "Is there anybody out there?" and "Gamechanger Nearshoring," based on the following key drivers of change:

Current Thinking
Key points of current thinking around Social Cohesion are:
- Brain drain, muscle drain, de-population (loss of human capital in all dimensions) and its effect on public and economic affairs;
- Emigration/de-population and the resulting erosion of the funding base of welfare states;
- Brain drain and its negative impact on civil society to challenge elite-driven regimes;
- Unsustainable state capture, corruption, and state-driven organized crime.

Key Drivers of Future Change
Key drivers of future change to address Social Cohesion are:
- Shortening of supply chains (nearshoring) due to geo-economic shifts (relocation of production sites from Southeast Asia to WB);
- Pull effect for labor migration from Southeast Asia, Turkey, MENA, Sub-Saharan Africa, replacing traditional local workforce (challenge for social cohesion/social fabric);
  Foreign investment into nearshoring (only if corruption will be tackled);
- Decelerating brain drain and remigration of diaspora which could become a change agent;
- Diaspora voting which could directly affect election outcomes;
- Generational shifts in politics as a chance for societies to attract remigration;

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10   Menekşe Tokyay, "Montenegrin Ambassador to Turkey: 'One Third of Foreign Companies in Montenegro are Owned by Turks'," in: duvaR.englisch, January 18, 2022, https://www.duvarenglish.com/montenegrin-ambassador-to-turkey-kastratovic-one-third-of-foreign-companies-in-montenegro-are-owned-by-turks-news-60159 (accessed September 7, 2023).

- Climate change which soon might lead to displacement in the WB and to inbound migration from climate change torn countries further South;
- Clear EU perspective which would give new impetus to define a new social contract.

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Is there anybody out there?

With all eyes on the reconstruction of Ukraine and preoccupied with its rising internal problems due to accelerated climate change, mass migration from the global south and geopolitical contestation, little progress has been made on the accession of the Western Balkans to the EU.

This is mainly due the EU's inability to reform its accession process (unanimity). Hence, by 2030, no further aspirants were able to join the EU, not even Ukraine (being a geopolitical priority).

With such a grim prospect, de-population of Western Balkan societies accelerated since the late 2020s, a process that was enhanced by massive labor shortages in the again booming economies of the EU, the United States and other economic powerhouses of the Global North.

Climate change made the situation even worse. In the late 2020s, ever growing parts of the Western Balkans suffered from severe water stress, forcing more and more people to leave rural areas as agriculture, livestock farming, and tourism became unsustainable.

At the same time, inbound migration from even harder hit places (Mediterranean, MENA region, Sub-Saharan Africa) changed the social fabric of the Western Balkans, leading to ethnic conflicts, anti-migrant sentiments, and political radicalization.

While the European Union, as a fig leaf, continued to transfer substantial funds into the region, this only fed corruption and hardened corrupt elites' grip on power, leading to the resignation of reformist forces.

With this vicious circle spinning faster and faster, the Western Balkans in the mid-2030s resemble a wasteland captured by corrupt elites, contested by regional and global powers, suffering from the impact of climate change, and deserted by its people.

By 2040, the diaspora from the Western Balkans is twice as large as the population in the region – with no incentives whatsoever to return to their homelands.

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Gamechanger Nearshoring

Never waste a good crisis! It all started with COVID-19, the Russian intervention in Ukraine and the tightening conflict between China, the United States and the re-invented "West", the Western Balkans predominantly siding with its liberal-democratic partners.

Geopolitical and geo-economic considerations opened a pathway for a more flexible, multi-track EU accession scheme. An even stronger geopolitically oriented EU accomplished the seemingly impossible: to strike a balance between its accession standards and political pragmatism.

Full access to the European single market and through this to the wider European Economic Area allowed the free flow of goods, services, capital, and people. What at first glance triggered fears of accelerated outflow of people from the region into EU re-vitalized economies, took a counter-intuitive path.

Triggered by its geo-economic re-/nearshoring agenda, the EU Commission, through its Structural Funds instrument as well as its geopolitical initiative "Global Gateway," channeled massive investments into Western Balkan economies to relocate critical value chains from South-East Asia and China and to con-

nect the region's economies and infrastructures with each other and the rest of Europe.

With new political elites at the helm in many of the Western Balkan countries, governments in the region set up recruitment and remigration programs to bring home diaspora talent, entrepreneurial spirit, innovation, and investments.

At the same time due to its low living costs, well-functioning education system, and reliable infrastructure the countries of the region attracted migrant workers from across the Mediterranean, Turkey, as far as South-East Asia and Sub-Saharan Africa (which also created social tensions, led to anti-migrant/racists movements, and fed political polarization).

By the early 2040, the WB economies developed into a well-oiled workbench to feed green and digital economies not only in the EU, but also gained access to overseas export markets.

Outlook and Policy Options

Demographic Change

- Demographic change does not lend itself to quick political successes or even election results. It is rather an indication of misconduct and the lack of social and economic incentives of past decades.

- Indeed, semi-democratic corrupt governments in the region profit to a certain degree from brain and muscle drain. As least, for as long the EU funnels in money which increasingly feeds dysfunctional systems, multinational companies profit from long-term, untransparent deals with corrupt elites and have an interest in preserving the status quo. Here, the EU could play a much more forceful role.

- Meanwhile, new money streams are being exploited by illicit actors, be it groups of trans-national organized criminals who profit from Western Balkan smuggling routes (trafficking, arms, drugs), all acting under the eyes of corrupt elites who get their cut.

- To slow migration from the region and to foster social cohesion, root causes need to be tackled. First and foremost, this refers to structural deficiencies in the region (corruption, lack of rule of law, quality of life, state-capture by traditional elites and parties, economic incentives, and stability). And it is the people's responsibility to challenge their elites, to change institutional processes, and to end dysfunctional systems.

- A key to changing the balance of power would be diaspora voting. This is particularly true for Bosnia and Herzegovina where increased diaspora voter participants would have turned the tide in favor of younger and more progressive forces in 2022 already.

- Digital platforms to organize political and social movements increasingly change the political discourse in WB societies and in the diaspora. Alliances of well-educated diaspora could trigger change not only on the socio-political but also on the socio-economic level (invest-ments into the digital economy/digital services but also political activism and online-based initiatives to challenge corrupt elites, dysfunctional bureaucracies, and to support political and social movement in the region).

- On the other hand, governments need to provide the foundation for high-quality public services (education, health, infrastructure) based on transparent, non-corrupt, rule-of-law based contracts. To achieve this, governments, with the help of the EU need to close the so-called implementation gap, e.g., improve capabilities and capacities to implement allocated resources on the ground. This means investment in human capacity building is needed while at the same time improving public systems and administrations, due process, and public institutions has to be achieved.

- To make best use of the social and human capital of the diaspora, a study of recent WB graduates who studied abroad could provide a mapping that could forge a "brain gain" network for the region that not only promotes economic, but also political, change. Each year, some 23,000 young people from BiH leave the region to start their studies abroad.[11]

- Start with people who want to stay, develop a positive narrative, build attraction schemes to bring home the diaspora and start to engage the silent middle class politically.

- Change the narrative into "Improving the Quality of Life and Wellbeing" (basic services, green transition as a new market, attract the diaspora which is now "The Welfare State," highlight tourism and thereby change the perception of the region abroad), hint at the global trends that also reshape WB societies (geopolitical and geo-economic shifts, climate change, regional power shifts).

Economic Development

- The ongoing geopolitical and geo-economic division of the world comes with many uncertainties and disruptions. However, it also holds

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11 Daria Sito-Sucic, "Bosnia Losing Many Young People to Emigration over Poor Education, Work Prospects," in: Reuters, November 24, 2021, https://www.reuters.com/world/europe/bosnia-losing-many-young-people-emigration-over-poor-education-work-prospects-2021-11-24/#:~:text=A%20new%20survey%20by%20the,public%20services%20and%20endemic%20corruption (accessed September 7, 2023).

opportunities. On the one hand, it shortens supply chains for industrial goods, referring to reshoring or nearshoring of critical industries such as semi-conductor production. On the other hand, it allows for the rebirth of industrial policies (triggering public investments and subsidies), which, however, also come with strings attached and demanding tough geopolitical and geo-economic choices (export and import controls, rules and regulations, standardization, conditioned access to third markets such as EFTA, CETA, sanction, etc.).

- The role of the private sector, supported by governmental incentives, could hardly be overestimated. But time is pressing, and competition is fierce among EU member states to profit from the relocation trend of companies withdrawing from China, Russia, and other places that have become unattractive for doing business.

- "Relocation" patterns in more traditional industries such as agriculture, food processing (food security), and even tourism can be seen. This goes hand in hand with greening those industries which attract new clientele.

- An emerging regionalization can be witnessed, e.g., Turkey looking for economic partnerships in the Western Balkans which could become a gateway for foreign investments.

- Counterproductive pull factors must also be considered such as German recruitment policies to provide German industries and care systems with skilled (and comparatively cheap) personnel from the Western Balkans.

- It is also necessary to address the catalytic trends that might exacerbate emigration from the region such as unabated corruption, state-capture by traditional elites, environmental pollution, or the impact of climate change – in short: the lack of perspective.

4.2 Green Transition – Mission (Im-)possible?

Western Balkan economies are one of the biggest per capita Greenhouse gas (GHG) emissions emitters in Europe. This is due to their dependence on fossil fuels. Almost 62 percent of current CO_2 emissions come from coal-fired power stations, of which 16 operate in the region and use lignite high in Sulphur content. These 16 coal power plants in the Western Balkans produce more hazardous emissions than the 250 plants in the EU combined.[12]

As a dire consequence, almost 30,000 people annually die prematurely due to air pollution alone in the region and in littoral states because air pollution does not know borders. While mortality rates attributed to air pollutants were cut back by 16 percent in the EU compared to 2012, they went up by 30 percent in the Western Balkans.[13]

Even today, the Western Balkans are one of the regions hardest hit by climate change in Europe. Currently available data on climate change in the Western Balkans show an alarming increase of average temperature across the region of 1.0 – 2.0°C and up to 3.0°C with continued rise of global GHG. By the end of the century, the Western Balkans are destined to warm further between 1.7 to 4.0°C, depending on the global efforts in GHG emission reduction.[14]

The main consequences of accelerated climate change in the region are:

- Higher frequency and longer duration of heat waves and droughts (extreme water stress during the summer, comparable to today's MENA region);
- Increased risk of wildfires and forest degradation due to water scarcity;
- Increased risk of flooding;
- Decreased average river discharge and problems with drinking water quality and water supply (also for power plant cooling systems);
- Early start of growing season with high risk of late spring frost and decrease in yield quality due to increase in average temperature and water scarcity;
- Increased energy consumption during summer seasons due to increased need for cooling systems;
- Increased health and safety risks.

There is neither shortage of analysis or policy recommendations nor a lack in political strategies or high-level dialogue. Rather, there is a lack of public awareness, political will and due process, institutional capacity on all levels of government, and scarcity of public financial means to shift gears from a predominantly coal-based industrial infrastructure to more sustainable modes of energy production and consumption, even though the region profits from substantial financial assistance under the Stabilization and Association Agreement and the EU Green Agenda for the Western Balkans.

In November 2020, the six leaders in the Western Balkans adopted a Green Agenda at their Sofia Summit and followed up with a roadmap in October 2021. It aims at aligning the Western Balkans with the European Green Deal that aims to make Europe carbon-neutral by 2050. And under the auspices of the Berlin Process, the EU and the six WB leaders developed a regional energy and climate plan for the region ("Western Balkans Climate Partnership").

With Russia's aggression against Ukraine, rising energy prices and concerns over energy security led to a reprioritization of energy and climate policies in the Western Balkans, very much as in the rest of Europe. Faced with a potential crisis, gov-

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12 Claudio Belis et al., Status of Environment and Climate in the Western Balkans, European Commission, June 1, 2022, https://dx.doi.org/10.2760/294516 (accessed September 5, 2023).

13 European Fund for the Balkans, What is Polluted Air Doing to Us in the Western Balkans?, European Fund for the Balkans, January 26, 2022, https://www.balkanfund.org/general-news/what-is-polluted-air-doing-to-us-in-the-western-balkans-1 (accessed October 31, 2023).

14 Ana Vuković et al., Study on Climate Change in the Western Balkans Region, Regional Cooperation Council Secretariat, June 6, 2018, https://www.rcc.int/pubs/62/study-on-climate-change-in-the-western-balkans-region (accessed September 5, 2023).

ernments were forced to prioritize short-term energy security, and plans for coal phaseouts were again put on the backburner. North Macedonia and Serbia announced they will increase coal production to supply existing or new thermal power stations. Bosnia and Herzegovina is also exploring a revival of electricity generation from coal.

Against this backdrop, two future scenarios were sketched, one being a business as usual or slippery slope scenario ("Bananas in Topčić Polje"), the other being a progressive scenario ("Green New Deal – Mission Possible"), based on the following key drivers of change:

Current Thinking

Key points of current thinking around Green Transition are:

- WB is already the most impacted by Climate Change in Europe;
- Greenhouse gas emissions (GHG) in the region will be four percent higher in 2050 than in 2020 if current legislation stays in place;
- Poor air quality of the region (while mortality rates attributed to air pollutants were cut back by 16 percent in the EU compared to 2012, they went up by 30 percent in the Western Balkans.);
- Extreme water scarcity and its impact on agriculture, energy security, and public health;
- Poor public water management which leads to corruption and sell-out of public goods;
- Privatization of public goods (water) and foreign direct investment into (micro) hydro power plants and its impact on energy and water security;
- Climate change-induced migration and further de-population of arid zones in WB;
- Lack of regional cooperation to fight climate change;
- EU-driven green transition can lead to further political polarization.

Key Drivers of Future Change

Key drivers of future change to address the Green Transition are:

- Accelerated impact of climate change in the region;
- Extreme water stress which leads to parts of WB becoming uninhabitable;
- Collapse of tourism which is a major income base for most WB countries;
- Increased inbound migration from MENA region;
- Social Movements, public awareness, and social shifts regarding climate change
- Establishment of Green parties throughout WB (possibly cross-border socio-political Movement);
- Environmental issues change hard-wired political systems (could lead to change of party system / composition of parliaments);
- Generational shift in society and politics (new style, new topics);
- Migration and brain drain reduces pressure upon corrupt elites which eases a lock-in of unsustainable economies and energy systems (elite state-capture);
- Green investments and EU Structural Funds can help as new revenue sources;
- International policy agendas can pressure to change policy priorities;
- WB offers possibilities as an energy production site for Photovoltaics (PV) and wind energy and green hydrogen.

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Bananas in Topčić Polje

What started as a tourist attraction in the mid-2010s has become a blossoming business in the 2030s: growing bananas in the Mountains of Bosnia and Herzegovina. An increase in average temperature by 2.2°C between 1970 and 2035 made banana planting a profitable business, if only the plantations were not exposed to recurrent weather extremes and wildfires.

By the 2030s, the Western Balkans belonged to those European regions which were hardest hit by the consequences of climate change (severe water stress, heatwaves, wildfires, floods, public health). Loss and damage due to climate change by far exceeded economic growth rates.

While climate experts expected temperatures to rise even further, this dire prospect triggered even more migration to northern Europe; leaving formerly productive rural areas and tourist hot spots abandoned. It became obvious that WB governments had wasted 15 years of precious time to fight and adapt to climate change.

Even though the EU provided massive financial support to enhance the decarbonization of energy sectors in WB countries through the Economic and Investment Plan (EIP), the lack of carrot and sticks (EU Emissions Trading System) and growing dependency on Russian coal and oil hardwired WB carbon-intense infrastructure and policies.

Although WB governments in the 2020 Sofia Declaration put climate change high on their agenda, they only paid lip-service to their agreed 2030 goals. Vested interests of political elites and their cronies in state-owned energy companies prevented a coal phase-out and adaptive measures.

Instead, long-term contracts were given to foreign investors to install mini-hydro power stations, Photovoltaics (PV), and wind-parks to guarantee green energy security. What could have been a profitable new income model for the region became a new energy dependency, the green energy transition was captured by autocratic leaders to empower and enrich themselves.

When Green and Social movements started to shift the public discourse about climate change and gained political influence, it was already too late: corrupt and incapacitated elites had privatized the development of hydro, solar and wind power as well as the production of green hydrogen.

Generated with Midjourney

Green New Deal – Mission Possible

It is true: Until the mid-2020s, climate change awareness was almost non-existent in WB societies; and other than in Western European societies, Green parties never took root in the deeply entrenched WB party systems.

But with extreme weather events, heat waves, flooding, draughts, and wildfires becoming the new normal in the region, causing billions of United States Dollar (USD) in loss and damage, elites came under public pressure from social movements and Green parties which now entered the parliaments in remarkable strength.

With the WB gaining the new status of "Associate Members" with unrestricted access to the European single market, WB economies fell under the jurisdiction of the EU taxonomy demanding EU economies to decarbonize by 2050 at the latest. Compliance with the EU taxonomy not only promises extended funding but also access to the European internal energy market.

What played WB economies and Green and Social movements into their hands was a massive reorganization of European supply chains. The geopolitical and geo-economic rivalry between the United States and the EU on one side and China and Russia on the other led to the relocation of industries onto European soil. Due to their strategic position, their good infrastructure, their well-educated population (and diaspora), as well as their high potential for the production of green energy (PV, wind, green hydrogen), the WB economies became the main profiteers of this development.

With Green watchdogs in Parliament, the development of green infrastructure served another purpose: bridging ethnic divides and promoting water and energy security through integrated networks throughout the region. Interconnectedness and the redundancy of utilities became a key feature to adapt to climate change in the region.

Outlook and Policy Options

A green transition, especially in the field of energy production, is inevitable to tackle the climate crisis, mitigate its effects on human health and the environment, and to ensure future economic development and competitiveness as well as social justice.

However, implementation is lacking due to the apparent financial, economic and social costs of transformation processes, conflicting interests of societal actors and stakeholders, state capture and corruption, as well as insufficient regional cooperation.

When it comes to the green transition, the Western Balkan population's attitude is ambiguous. Even though air pollution, particularly during the heating season, has led to massive social discontent – and the Green Agenda has been a big political promise for years – people fear rising energy costs and the risk of energy insecurity.

The biggest uncertainty refers to energy infrastructure which, except for Albania that almost completely relies on hydropower, is geared towards fossil energies. What is lacking is intra-regional grids to transmit highly volatile green energy cross-border if there is over-capacity, energy storage systems, meters, and regulatory frameworks.

As long as the energy sector is closely linked to state-capturing, corrupt elites who profit from the highly subsidized energy sector and are not held accountable for its external costs (public health, environmental pollution, mid- and long-term impact of climate change), there will not be a big push into greening the energy sector.

On the other hand, public knowledge about the energy sector is quasi non-existent, and fear of change particularly among the poor add to the persistence of an unsustainable status quo.

Hence, environmental pollution and the impact of climate change (particularly water stress and wild-

fires) will soon lead to accelerated emigration, reduce agricultural productivity, and have a negative impact on tourism, an important sector in the region (Albania: 21% of GDP, Montenegro: 32%; other WB countries less than 10%).[15]

While climate change is already a catalyst for change, other disruptive events, developments, or policies might accelerate the green energy transition in the WB. One of them being the European Carbon Border Adjustment Mechanism (CBAM). Soon, it will make polluting companies pay for their exports to the EU and will impact the economies of the WB region. Only by adopting a carbon pricing or integrating with the EU Emission Trading System (ETS), can WB economies be exempted from CBAM.

Another push factor is the emergence of Green parties across the WB region and a new generation of politically engaged citizens (Gen Z). Furthermore, these movements now sit in Parliament (in BiH: "We will", in Serbia: "We must", in Croatia: "We can") and serve as civil society's watchdogs to hold corrupt and incapacitated governments accountable. One example is the sellout of small rivers to foreign investors and private companies who build their own micro-hydro-power plants to ensure their energy independence, again fed by corruption and elite state-capture.

Hence societies in the region and the EU need to ensure that the green transition will not be highjacked by old elites to renew their traditional business model which consists out of state capture, corruption, and cronyism.

But the biggest lever for change would be regional energy cooperation, which, in a green energy world, is indispensable in any case because Western Balkans energy markets are far too small to run efficiently and to manage the technical difficulties that are inherent in green energy systems (buffers, storage, transmission, peaks).

15   Fidelity Consuling Ltd, Studies on Obstacles and Opportunities for Doing Business in the Region, 2020, Chamber Investment Forum Western Balkans 6, https://www.wb6cif.eu/wp-content/uploads/2020/11/WB6-CIF-Study-Prospects-for-Travelling-and-Tourism-Sector-in-the-Western-Balkans-in-2020.pdf (accessed September 6, 2023).

4.3 Peace and Security in the Western Balkans – The EU as Peacemaker

Peace and security in the Western Balkans are always in the back of our minds when talking about the future of the region. That the United States, through the Dayton Agreement, became a guarantee power for peace and security in the region cannot be over-estimated. It was the first time since World War II that the United States entangled itself in foreign region wars without being exposed to a direct security threat or being obliged by formal alliance agreements.

As exceptional as the Dayton Agreement is, this is exactly the reason why any scenario on the future of peace and security in the Western Balkans needs to start from the assumption that the United States, particularly under a Republican President, would most likely not send troops for peace enforcement. This task will rather fall upon Europeans (with the support of NATO), with all the risks and uncertainties attached to it in a world that is again being divided along geostrategic sphere's interests.

Whereas for the time being unresolved regional conflicts are slowing down NATO and EU accession processes (not to speak of the need for unanimous votes to enlarge both clubs), political polarization, nationalism, and non-cooperation deepen mistrust and tensions in the region. At the same time, corrupt elites in the region profit from great power competition using access to the region as a geopolitical bargaining chip.

Whereas in the past the prospect of EU integration has served as a de-escalation mechanism throughout the region, the EU now becoming a hard power and striving for more strategic autonomy adds an additional incentive for the WB to join the Union.

Meanwhile, NATO membership of Albania, Croatia, Montenegro, North Macedonia has embedded large parts of the region into a Western-led security architecture but at the same time has not made relationships with Serbia easier – with President Aleksandar Vučić playing geopolitical contestants artfully against each other.

With Russia's war of aggression in Ukraine, the European security architecture has collapsed. Moscow's invasion made clear that Vladimir Putin wants to tear down the Post-Cold-War security order under the auspices of NATO and the European Union and instead aims at dividing Europe again into spheres of influence. As long as NATO and the EU cannot fill the security void in the Western Balkans, the region will always be a bridgehead for undue foreign influence and the destabilization, not only of the region, but of Europe at large. This is particularly true since the United States abandoned its "Two War Doctrine" and now prepares itself for a coming conflict with China in the Indo-Pacific.

How Russia's aggression against Ukraine will end and what role the West will play in the war's endgame will be decisive for the future European security architecture. In this future order, the Western Balkans will play a crucial role, either as a source of constant instability or as a region of stability and prosperity, well-positioned between Eastern and Western Europe, the Black and the Adriatic Seas, and as a multicultural region where the Occident and the Orient meet.

Against this backdrop, it is all too obvious that 20th century thinking, as well as existing institutions and political mechanisms, will not be sufficient to lay the foundation for a lasting peace in the region and Europe at large. Both regional elites and societies, as well as the European Union and its member states, need to adopt a new mind set to face the security challenges that lie ahead.

In this vein, two scenarios were developed to show the bandwidth of plausible alternative futures: A business as usual (or slippery slope) scenario ("Eyes wide shut: Nothing New in the Western Balkans?") and a progressive, yet counter-intuitive, scenario ("The End of Balkanization: Towards an Integrated European Security Framework"). They are based on the following key drivers of change:

Current Thinking:

Key points of current thinking around peace and security are:

- Remaining unresolved regional conflicts most likely will not lead to another war, but fuel violent flares and polarization between ethnic groups;
- Impact of U.S. (Presidential) elections on peace and security in Europe will have significance;
- Lack of EU hard power (military capabilities & strategy) is problematic (merely crisis management);
- Global powers use the WB as theatres for power projection (Russia, China, EU, Turkey, United Arab Emirates);
- Corrupt WB governments use geo-political tensions as bargaining chip;
- Rise of middle powers increase complexity and uncertainty (Turkey);
- Increase in illicit arms trafficking (inbound/outbound);
- Unpreparedness of WB societies to defend themselves against cyber-attacks is a risk (critical infrastructure);
- Impact of new tech on public opinion, elections, rule of law, misuse of power.

Key Drivers of Future Change

Key drivers of future change to address peace and security are:

- Outcome of Russia's aggression against Ukraine and the repercussions on WB will be important (also: handling of Crimea question);
- Impact of U.S. (Presidential) elections on WB foreign and security policy (reliability as security guarantor);
- Revitalization of transatlantic relationship due to Ukraine war and U.S. pressure on WB countries regarding security issues;
- Malign influence of third actors (Russia, China, Turkey) and also infrastructure initiatives and geo-economic dependencies as levers to gain influence;
- WB's cyber threat vulnerability in connection with WB's integration into Common Digital Market and the level of regional cooperation on cybersecurity;

- Reform of EU foreign and security-policy decision-making process (qualified majority);
- Whether EU develops into a hard power (strategic autonomy > incentive for WB countries to join EU);
- Uncertainty if regional conflicts can be resolved and regional security cooperation be achieved;
- Possible Wild Card Scenario with WB being left behind comparable to Afghanistan as EU and United States to focus on more pressing security threats.

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Eyes Wide Shut: Nothing New in the Western Balkans?

After a long war of attrition, Russia's aggression against Ukraine turned into a semi-frozen conflict – neither side being able to force the other to surrender. Russian forces nevertheless continued their terror strikes on critical infrastructure and civilian targets to undermine the people's morale and to prevent Ukraine from recovering.

While attention shifted from the battlefields of Ukraine to emerging conflicts in the Indo-Pacific and the wider MENA region, no attention was left for what turned out to be a creeping security crisis in the Western Balkans.

Whereas in the past, the EU accession pledge served as a de-escalation mechanism and was a strong incentive for cooperation among elites and conflicting ethnic groups, the EU's inability to put Western Balkan societies onto a reliable accession track created fertile ground for nationalists, revanchists, anti-Europeanists and hostile third actors.

With regional conflicts in the Western Balkans unresolved, foreign state-sponsored groups, supported by corrupt and populist regional elites created an atmosphere of mistrust and toxic nationalism that could ignite violent flares at any time.

Their tools: disinformation campaigns, cyberattacks, illicit trade of weapons, trafficking of migrants to Europe, bribery of top-brass military and political leaders, surveillance and assassination of journalists and critics, acquisition of critical infrastructure – the full arsenal of psychological and hybrid warfare.

Their strategy: To influence the public discourse to drive wedges between the EU and societies in the Western Balkans and prepare them for a geopolitical reorientation.

And with the EU entangled in global power games and eyes wide shut regarding developments in their backyard, Western Balkans societies gave up on the European Dream.

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End of Balkanization: Towards an Integrated European Security Framework

It took the EU two decades of crisis management to receive its geopolitical wakeup call: twenty years after its Francis Fukuyama moment (EU Global Strategy 2003: "Europe has never been so prosperous, so secure or so free")[16], the EU finally stood up to the plate and took resolute steps to become a hard security actor.

As if Russia's war against Ukraine was not proof enough that the EU needed military self-reliance, only Donald Trump's return to the White House brought clarity: The United States would no longer be a reliable security partner for Europe. With the Western Balkans' unfinished business of NATO accession, the region became the perfect theatre for Russia and China to test Western resolve.

But this time, Europe was prepared: Thanks to a revitalized Weimar Triangle and a second, geopolitically even more determined, von der Leyen Commission, the EU from 2025 had geared up efforts to underpin the concept of strategic autonomy with concrete steps.

Permanent Structured Cooperation (PESCO) developed into an incubator for deep military cooperation and integration between EU and member states, with WB NATO members and BiH (strengthened military-political ties, inter-operability of forces, intelligence cooperation, improved cyber defense/anti-hybrid warfare capabilities).

Besides military readiness and preparedness, EU-NATO-WB military cooperation created a collective mindset, a sense of community, belonging, and solidarity. As important, it kickstarted intra-WB defense cooperation.

When Russia's aggression against Ukraine turned into a frozen conflict, Russia started to test Europe's resolve in Georgia, Moldova, the Baltic Sea, and in the WB (using the Republika Srpska as bridgehead to inflame ethnic conflict in BiH). But this time, the EU and its WB partners were ready to face the challenge. In a concerted effort using all the sharp and hard power instruments at its disposal to defend the sovereignty, integrity and self-determination of WB societies.

As in the 1950s, it needed an external threat to enhance regional cooperation and integration in Europe. This time, the geopolitical landslide and the eroding European security order enhanced the accession of WB countries to EU and NATO security frameworks and deepened regional cooperation.

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16   Council of the European Union, European Security Strategy. A Secure Europe in a Better World, December 2003, https://www.consilium.europa.eu/media/30823/qc7809568enc.pdf (accessed September 7, 2023).

Outlook and Policy Options

The future European security order very much depends on the outcome of Russia's war in Ukraine and the role of the West in this endgame. In the short term, European security is highly dependent on the U.S. Presidential elections next year. But for the long haul, the trajectory is clear, while the United States pivots toward Asia and prepares itself for a conflict with China, Europe needs to gear up geopolitically and militarily and needs to drive military cooperation and integration to be able to pursue its vital interests and defend its member states' sovereignty, integrity, and self-determination.

NATO's and the EU's unfinished business in the Western Balkans has developed into the continent's most vulnerable Archilles Heel. While locked-in, corrupt elites nurture ethnic conflict and risk their escalation (using geopolitical bargaining chips to resolve regional conflicts according to their wishes), a protracted Russia's aggression against Ukraine might soon develop into a full-fledged proxy conflict that might soon spill over into the larger Black Sea region and the Balkans.

With EU and NATO enlargement processes gridlocked due to unresolved regional conflicts (among other structural reasons), the region is highly vulnerable to outside undue influence. Adding to an already deteriorating security environment is the fact that WB societies and critical infrastructure are completely unprepared to defend themselves against cyberthreats and misinformation campaigns.

Given this rather bleak outlook, what could be a way forward for the EU and the Western Balkan societies to improve regional security? Unfortunately, compared to the pressing security challenges in Eastern Europe and in the Indo-Pacific, the fragile security situation in the Western Balkans does not raise enough attention to climb political agendas in Washington, Brussels, or Berlin. This, in turn, allows regional elites to use their geopolitical bargaining chips, dominate the public discourses, slow down reform agendas, and hold on

to power. Lacking a convincing and more promising strategy, the EU continues to nurture these elites and dysfunctional processes, while sliding deeper and deeper into geopolitical Terra incognita. Why are these processes dysfunctional? Because there is no level playing field. While the EU pursues an institution- and rule-of-law-based approach, populist regimes in Eastern Europe and the Western Balkans use their political leeway due to an uncertain international situation by increasingly building personalized relationships among "strongmen" (Victor Orbán, Aleksander Vučić, Recep Erdoğan, Xi Jinping, Vladmir Putin, …).

But more uplifting scenarios could also be envisioned, again dependent on the outcome of Russia's aggression against Ukraine, EU resolve and political will, further geopolitical developments and the outcome of next year's U.S. Presidential election.

Starting from the assumption that Russia's war of aggression has given NATO and the transatlantic relationship an unexpected push and that one of the West's war aims is to teach Russia a strategic lesson, a paradigm shift in EU military-strategic would be witnessed thinking, that would also necessitate a political mind shift. Then, geostrategic considerations would de-prioritize due process and would emphasize a quick accession process into the EU (and NATO) to fill the strategic void in the Balkans and in Eastern Europe (Ukraine and Moldova, less likely Georgia), a rationale that also applied in the Eastern Enlargement Process after the end of the Cold War. This, in turn, would only be possible if the EU was able to reform its decision-making processes (qualified majorities) and find ways to sharpen its toolbox to better deal with member states which do not play by commonly agreed upon rules, procedures, and standards (Copenhagen and others).

Looking at the U.S. Presidential Elections, a *Make America Great Again* (MAGA) hardliner in the White House would most likely enhance EU security cooperation, integration, and the overall strategic autonomy of Europe. In this case, the United States will no longer bear the financial and military

brunt to prevent Russia from winning the war in Ukraine (even some kind of deal-making can be perceived to end the war). Building up hard security capabilities will be a vital interest of Europeans. And with NATO's most recent enlargement (Albania, Croatia, North Macedonia, Sweden, Finland), a closer EU-NATO cooperation in Europe is a logical and necessary step to conclude.

In this vein, leaning toward the EU and a more Europeanized NATO would not only enhance security and stability in the Western Balkans, but also open a new pathway and inject a new incentive to overcome the current gridlock. Joining PESCO and making use of the European Peace Facility (EPF) rather than concentrating primarily on NATO would be a new way of overcoming regional conflicts, strengthening regional security, and enhancing regional security cooperation in the Western Balkans. Such a new track would also open access to the EU Common Digital Market, Cybersecurity legislation, and funds to improve digital infrastructure and its security.

In return, Western Balkan states' military gear and troops could strengthen EU/NATO defense capabilities in the East while the EU would exert military oversight, would be involved in training, and would use the EU's Strategic Compass as a common basis for geostrategic alignment among EU member states and affiliated countries.

Policy Options:
- Currently, only corrupt local elites, organized crime (illicit trade of weapons under the eyes of state-capturing leaders), and external actors profit from the status quo (Russia, China, Turkey, Gulf Countries). But also, political leaders in EU member states such as Hungary and Bulgaria that instrumentalize WB regional conflicts or their good relationship with Russia to extend their bargaining power and to raise the political price for staying on course in the geopolitical game.
- Given the state-capture of elites and their cronies in the WB and a lack of elite consensus re-

garding EU/NATO accession (due to non-alignment on global affairs), only disruptive events may shift the current gridlock. This could either be the widening of Russia's aggression against Ukraine (Black Sea, Moldova, Baltic States, Georgia), a stronger U.S. engagement in Europe or a U.S. intervention into Russia's aggression against Ukraine, renewed armed conflict in the Western Balkans, war in the wider MENA region or in the Indo-Pacific, mass migration from the MENA region, collapse of ecosystems due to climate change, economic collapse due to brain drain and radicalization of populations).
- A silver lining, at least for the medium term, is the emergence of a new generation of politicians that want to embark onto a reform course to set the countries of the region onto a straight-forward EU/NATO accession pathway (protests in the streets of Belgrade, Green parties mushrooming across the region, diaspora, etc.).

4.4 EU Accession – Gridlock or Gearing up?

Since the accession process for the Western Balkan countries started in 2003, a year before ten Eastern European countries joined the Union the geopolitical environment has changed profoundly. So did the public mood across the continent.

With the former Warsaw Bloc countries at the doorsteps of the European Union, the EU in its first security strategy in 2003 touted that "Europe had never been more prosperous, secure and free."[17] Twenty years later, the updated version of the EU's Strategic Compass talks a different language: "At stake are the very principles upon which international relations are built, not least those of the United Nations (UN) Charter and the Helsinki Final Act. History is accelerating once again. […] We live in a world shaped by raw power politics, where everything is weaponized and where we face a fierce battle of narratives."[18]

During those 20 years, political priorities have shifted. In 2003, the EU's Thessaloniki Summit wanted to kickstart the WB accession process to take care of its unfinished business in the Balkans as quickly as possible (despite its own inability to integrate more members without reforming its decision-making processes as demanded by the Copenhagen Criteria). While accession negotiations with Croatia started in 2005, unresolved conflicts in the region prevented a faster pace in the accession process with the six WB countries.

Soon thereafter, Europe was battered with one crisis after another, starting with the world economic and financial crises (2007 – 2009), the Arab Spring (2010 – 2011), the Euro crisis (2010 – 2012), Russia's first invasion of Ukraine (2014), the Civil War in Syria, the rise of the Islamic State (IS), Islamist terrorism in Europe and the migration crisis (2015 – 2016), Brexit (2016), Trumpism in the United States (2017 – 2020), and now Russia's aggression against Ukraine. Pre-occupied with external crisis management and keeping the EU afloat (internally), the WB accession process slipped off the political agenda and was reduced to a process of Eurocrats and their interlocutors in WB capitals.

It was local traditional elites who profited most from the slowed-down EU accession process and the vanishing public interest in the Western Balkans. Unchanged over the course of the last 20 years, corruption and elite state-capture has been unabated; the Bertelsmann Transformation Index even found a regress in economic and democratic development as well as in overall governance for all countries of the region.[19]

It took the Russian war of aggression before the EU received its geopolitical wakeup call and to reignite the Western Balkans accession process through the German-led "Berlin Process", only to see that public trust in the EU has massively eroded. The notion has even been reinforced by the fact that Ukraine and Moldova have recently been granted the EU candidate status for geopolitical reasons. Hence, even though German Chancellor Olaf Scholz during the last meeting in November 2022 argued for the WB's EU accession "as soon as possible,"[20] the Berlin Process in the eyes of annoyed WB observers is merely a substitute for the region's integration into the EU.

This is mainly due to the fact that all 27 EU member states have to agree on new accessions to the EU. Since for some EU member states any further EU enlargement has to be decided by a public referendum (France for instance), increased Euros-

17   Council of the European Union, European Security Strategy. A Secure Europe in a Better World, December 2003, https://www.consilium.europa.eu/media/30823/qc7809568enc.pdf, (accessed September 7, 2023).

18   Josep Borrell, Speech on March 22, 2022, March 22, 2022, https://www.eeas.europa.eu/eeas/strategic-compass-make-europe-security-provider-foreword-hrvp-josep-borrell_en?s=194 (accessed September 5, 2023).

19   Bertelsmann Stiftung, Bertelsmann Transformation Index (BTI), 2022, https://atlas.bti-project.org/ (accessed September 5, 2023).

20   Olaf Scholz, Press Conference at the End of the Western Balkans Summit in Berlin, November 3, 2022, https://www.bundesregierung.de/breg-de/mediathek/pressekonferenz-nach-westbalkangipfel-im-kanzleramt-2139688 (accessed September 05, 2023), see also: Marina Vulović, The Berlin Process in the Western Balkans: Big Ideas, Difficult Implementation, SWP Berlin, December 12, 2022, https://www.swp-berlin.org/publikation/the-berlin-process-in-the-western-balkans-big-ideas-difficult-implementation (accessed September 4, 2023).

cepticism and populist government majorities in some EU member states make further EU enlargement highly uncertain.

What also hinders a restart of the WB accession process is the (unspoken) public notion within EU member states that the EU is again preparing the accession of a bloc of countries (as in 2004 with the Eastern Enlargement). In times of war, high inflation, economic downturn, and mass migration, the notion that "the boat is already full" prevents a necessary discussion about geopolitical and geoeconomic interests of EU member states in the further enlargement of the Union.

At the same time, there is little pressure from citizens and civil society organizations in the region to force their government to reform. They rather leave their countries, the continuous brain drain leading to a lack of will for reform of locked-in, corrupt elites.

To escape this vicious circle, new geopolitical realities and imperatives could become a gamechanger. However, global systemic rivalry and power projection has both benign and malign influence. While the EU pushes for transparency, rule of law, and balance of power, other powers seek to exert undue influence through corrupt regimes (proxies). While this global power game unfolds, WB governments become increasingly conscious of their strategic geopolitical position and that they can use their allegiance to either side as a bargaining chip (artfully played out by Aleksander Vučić).

At the same time, social movements (e.g., Green parties) are entering parliaments throughout the region; whether this is the beginning of a generational shift in politics remains to be seen.

Against this backdrop, two antagonist scenarios were again developed: A business as usual/slippery slope scenario ("Vicious Circles and Geopolitical Bargaining Chips") and a progressive scenario ("Shifting Gears: The Western Balkans and 'G-EU'-Politics"). Both are based on the following key drivers of change:

Current Thinking

Key points of current thinking around EU accession are:

- Half-hearted approach by both sides: WB governments didn't push hard enough for reforms, EU Commission pursued a technocratic approach, not always sided with progressive forces, rather supported elites;
- Clear-cut EU accession strategy for WB is still missing;
- Divided EU regarding WB accessions;
- Autocrats profited from the status-quo, mishandled EU funds to consolidate power;
- Authoritarian backlash in the region plays into the hands of authoritarian third actors (Russia, China, Turkey, United Arab Emirates);
- With the global order ever more contested, regionalization becomes the new normal (bargaining chip for WB governments);
- Regional cooperation is still lacking (Berlin Process could function as a catalyst);
- Uncertainty: How resolute is Brussels to follow up on its plans for the regions?

Key Drivers of Future Change

Key drivers of future change to address Peace & Security are:

- EU is awakening slowly to the new geo-political/-economic/-strategic realities and positions itself as geo-political actor;
- WB being in a strategic geopolitical key position holds a bargaining chip;
- EU incentives for WB-EU accession could be a driver for reforms (i.e., access to single market);
- Geo-economic shifts could lead to more sustainable investments in WB (re-/near-shoring);
- EU could be more flexible and/or nuanced regarding WB compliance with rule of law/transparency with respect to strategic realities;
- EU accession of Ukraine could have negative effect on WB's own EU accession (WB accession put on backburner);
- Key uncertainty: implications of Russian-Ukrainian War on WB.

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Vicious Circles and Geopolitical Bargaining Chips

By the end of the 2020s, progress in political and economic reforms in the WB region were hardly measurable and negotiations over the Acquis Communautaire had come to a standstill.

At the same time, public opinion polls in EU member states showed that referenda for EU enlargement would hardly have a chance for success. The EU was in complete political impasse.

When in late 2029 the incoming President of the EU Commission presented her political agenda, she described the EU's Western Balkans policy as "busted beyond repair" and conceded that the old EU enlargement mechanisms in the era of system rivalry were no longer functional.

With tensions high in international affairs and the WB countries conscious of their geopolitical bargaining chip, the EU in order not to lose Europe's influence on the Western Balkans and other neighboring regions developed a new instrument to bind non-EU member states closer to the Union: "Associate Membership."

Until the mid-2030s, the WB6, together with Ukraine, Moldova and Georgia joined the European Union as "Associate Members"; Brussels also started talks with the British government under the new scheme. The new status granted the WB6 full access to the European single market and to EU Structural Funds but was bestowed only with an observer status in EU institutions (no voting rights).

Yet the instrument soon backfired. What the EU thought to be a smart instrument to work around the political impasse while at the same time strengthening bonds with the region, political elites in the Western Balkans had no interest in reforming their systems any longer.

What the EU found itself in was a cat-and-mouse game that resembled Victor Orbán's tactics of the mid 2020s. While relying on the deep pockets of the European Union, only paying lip-service to EU values and solidarity. Soon Brussels had to wake up to the fact that its sharp power gets weaker the more members it allows to join the club.

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Shifting Gears:
The Western Balkans and "G-EU"-Politics

When asked at the end of her second term as President of the EU Commission in late 2029 what the biggest impact had on her as a politician, Ursula von der Leyen said: "Russia's invasion of Ukraine."

The geopolitical watershed caused by Russia's intervention in Ukraine, China's aggressive stance in the Indo-Pacific, and its assertive stance vis-à-vis Europe had deep implications for EU enlargement policies.

It became obvious that the EU had "to learn the language of power" and that it needed to act more geopolitically and pragmatically at the same time – to ensure that Europe would defend its security interests and remain "whole and free."

With the long war of attrition in Ukraine turning into a frozen conflict, prospects for a peaceful and collaborative European order vanished. Hence, the EU shifted gears and its Modus Operandi. In close cooperation with NATO, it introduced a new mechanism to ensure the protection of EU member states' vital interests and also offered this umbrella for neighboring countries to join.

Whereas European NATO member states extended security guarantees to NATO applicants, the EU took care of EU aspirants and focused on aspects of human security: to better cope with the impact of climate change, to move swiftly toward the green transition, to enhance energy security, to better manage migration, and to set up conducive digital ecosystems. Its most attractive carrot, access to the European single market and to newly established funding mechanisms.

As in the past, the EU is best in times of crisis. By the mid-2030s, the Euro-Atlantic community has stepped up to the plate and created a highly flexible and effective framework for (human) security cooperation for both EU member states (with deeply integrated societies) and associated members (with looser forms of cooperation) forging a highly effective European resilience network.

Outlook and Policy Options

From a geopolitical perspective, the Western Balkans are clearly opting for the West (with some uncertainties about Serbia in relation to Russia). The Western Balkans, both governments and citizens, are clearly in favor of EU membership, despite some EU fatigue.

Seen from Brussels, this is a comfortable situation in times of war. Seen from the region, Brussels still seems to apply a low-cost crisis management attitude toward the WB.

Even though Brussels is aware of the region's geostrategic role, the EU accession process is still lacking push factors, be it internal (citizens loudly demanding change), or external (security threat). Instead, the future remains foggy, a distant vision from the future for the next generation. It seems as if both EU and Western Balkan elites are satisfied with perpetual membership candidacy.

To change the dynamic, gearing up would be necessary on both sides. While the EU needs to trigger a public debate about the geopolitical and geo-economic benefits of WB accession (as it did in the case of Ukraine and Moldova) and needs to speed up its own reform debate, WB societies need to take on responsibility for their own countries and their future.

Given the high tensions in the international arena, another crisis will soon be faced, be it the escalation of Russia's aggression against Ukraine, a conflict in the Middle East or the Indo-Pacific, or mass migration due to state collapse in the MENA region and the Sahel. This time, the EU accession of the Western Balkans to the EU should not be met with indifference because malign actors would then be tempted to test the West's resolve and use the Western Balkans as a bridgehead, not with military means, but with smart public diplomacy, through economic means and by proofing their long-term commitment through investments and diplomatic offensives (BRICS Plus and other global government initiatives to drive wedges into a crumbling world order). With Donald Trump again in the White House, this becomes an even more realistic perspective. Hence, time and political priority is of the essence.

Geopolitical bargaining chips of WB governments notwithstanding, the EU needs to sharpen its instruments, lack or even backsliding of progress or foul play needs to be punished; progress should be incentivized and publicly acknowledged.

The lack of expertise and administrative capacity is a major problem on all levels of government, even more so as well-educated and highly skilled people leave their home countries in masses. Pooling resources through intra-regional cooperation and integration would be one measure to overcome these difficulties and to proof the seriousness of WB governments to overcome past conflicts and to make progress in reforming their societies on their pathway to EU accession. But it also needs to be said that democratic reform in the Western Balkans depends on liberalism in the EU; in other words, democratic backsliding by EU member states such as Hungary and Poland does not strengthen the legitimacy of Brussels to demand faster reforms in the Western Balkans.

5 Conclusions

What now? What do these trend analyses and future scenarios tell us about policy options? And what can be learned from the Aspen Germany Western Balkans Foresights Labs, which have been held regularly since 2016?

First (and this caveat cannot be repeated often enough): Foresight is neither a prediction (e.g., a definitive statement about a future outcome) nor a forecast (e.g., a linear projection of current trends or developments). Rather, foresight is about thinking in terms of plausible alternative futures whose outcomes depend on decisions (or omissions) by key actors.

When starting with a thorough analysis of megatrends, temporary drivers of change, and weak signals on the horizon, a much better understanding of the dynamics of change (or lack thereof) is obtained. Looking back at Aspen Germany's Foresight projects on the future of the Western Balkans since 2016, it is now possible to clearly identify the forces that are driving the future of the Western Balkans more than others.

Looking at megatrends, it is clear to see that the disruptive nature of geopolitics and climate change has been vastly underestimated in recent years. Cynically, one could even argue that Russia's war of aggression against Ukraine was a cleansing thunderstorm, a seminal turning point forcing all societies (at least in Europe) to position themselves.

Even if the war against Ukraine swept away the international security order, it served as a catalyst to reinvigorate "the West" – politically, economically, and militarily. A year before the 75th anniversary of the Washington Treaty, NATO now counts 31 member states, with Sweden already on the doorstep and three more countries seeking to join the club. Of these, 22 are EU members (and Sweden is 23). In this crisis, the EU has become an even stronger center of gravity for peace, prosperity, and freedom than before, which is a strong incentive for non-EU countries to join the Union. But time is pressing, because the war has changed the rules of the game considerably. This is especially true for non-aligned countries, which must balance global power centers and keep an eye on their interdependencies. But they can also benefit from the fault lines between the major powers and use their status as nonaligned states as leverage and bargaining chips to advance their vital interests.

Climate change is another story. Since we cannot negotiate with nature, we must adapt to the effects of climate change much more quickly than was expected when the Paris Agreement was signed. Wildfires, floods, and droughts of unprecedented magnitude are hitting societies around the world unprepared – at a time when the war against Ukraine is forcing us to put climate change on the back burner and to prioritize (energy) security.

Both megatrends, geopolitics and climate change, have huge implications for economies: While system rivalry drives economic strategies to de-risk (or even de-couple) highly interconnected and globalized economies, the effects of climate change are draining financial resources at a time when public budgets are being restructured, inflation is high, and economic growth is fading.

Other megatrends, such as demographic change, have been around for decades and are now intensifying in times of polycrisis (though the effects of COVID-19 have not yet been fully overcome). If demography is destiny, the future of the Western Balkans looks bleak indeed. Outward migration has reached levels where some openly discuss depopulating the Western Balkans before these countries join the European Union.

However, other megatrends, such as digitalization, automation, and artificial intelligence, are less disruptive than expected a few years ago, but are taking a different turn in the era of system rivalry –

leading to highly differentiated digital ecosystems within geopolitical spheres of interest, creating a much safer space for incremental development than in the Silicon Valley "Wild West" era of the early 2000s.

In summary, the dynamics have changed significantly since Russia's annexation of Crimea and even more so after Russia's invasion of Ukraine. EU accession of the Western Balkans is no longer seen as a technocratic process, but as a geopolitical necessity. In this sense, the European Union, not least through the Berlin Process, has stepped up its efforts to improve the negotiation process, but it has also launched a political dialogue that goes far beyond the logic of EU accession. What facilitates this geopolitical approach is the fact that parts of the region are now deeply embedded in the North Atlantic security framework, which reduces the risk of conflict in the region.

This is not to say that an improved regional security framework facilitates political processes. In order to achieve a new dynamic in the accession process, structural problems – the big elephants in the room – need to be addressed, and various approaches to overcoming them need to be developed:

- Identify Serbia's double game between Brussels and Moscow as obstacle to accelerating the accession process and hold it accountable (as Joseph Borrell Fontelles, High Representative of the Union for Foreign Affairs and Security Policy/Vice-President of the European Commission, has already done);
- An additional effort to pacify the conflict between Serbia and Kosovo;
- Overcome the untenable situation in Bosnia and Herzegovina with an anachronistic condominium and an at least partially, dysfunctional multiethnic federal state (Milorad Dodik, President of the Republika Srpska, is threatening to secede Republika Srpska from the rest of the country);
- The EU's inability to reform its accession processes (including unanimous voting) and its inability to offer more flexibility in accessing EU markets and instruments;

- The EU's unwillingness to put more pressure on corrupt elites in the region (carrots and sticks) and to support non-state forces to become agents of change (e.g., green movements);
- The inability of civil societies in the region to increase pressure on corrupt elites and dysfunctional governments (at all levels);
- Brain drain (and muscle drain) from the region to the EU-27 due to the rights granted to these societies by virtue of their EU accession process.

Despite these hard-wired structural problems, there is also a silver lining. The Western Balkans are now committed to deeper and broader regional cooperation, to create a common regional market, to improve regional energy security, to address climate change and promote the green energy transition, or to harmonize education systems and facilitate free movement within the region. The EU, including most of the conflict-ridden countries bordering the Western Balkans, has now focused its attention and available resources on unleashing a new dynamic in the Western Balkans. Much will depend on the new EU Commission, less on a possible change in the White House. Ultimately, it is Europe that must finish its unfinished business in the Western Balkans. And time will be of the essence.

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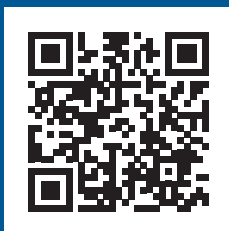
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