

Moldova's Security In 2030

Four Scenarios of Risk, Resilience,
and Strategic Choice

Report by Niklas Balbon

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Executive Summary

This report presents the results of a strategic foresight exercise on Moldova's future security environment to 2030. Rather than attempting to predict what will happen, it uses a workshop-based scenario analysis methodology to explore plausible alternative futures and support strategic thinking under conditions of uncertainty. The participants in the scenario exercise included experts on both hard security issues and broader political, social, and economic issues relevant to security. The experts were from Moldova and several EU countries, primarily Germany. They designed four scenarios that capture possible 2030 end states.

● **Sovereignty for Sale:** By 2030, Moldova has lost its European perspective and accepted a transactional political deal with Russia, yet Transnistria finds itself, paradoxically, more isolated and economically weaker despite Moldova's renewed political proximity to Russia.

● **The Grand Bargain:** By 2030, Moldova has achieved EU membership, but only at the price of accepting a Cyprus-like separation from Transnistria under a wider great-power security settlement in Eastern Europe.

● **Neutrality under Duress:** By 2030, Moldova's EU path is politically stalled, its security environment has deteriorated, and the country clings to its customary neutrality under mounting external pressure, including coercive Romanian pressure linked to reunification, while Transnistria remains unresolved.

● **Economic Reintegration, Strategic Exposure:** By 2030, Moldova has begun reintegrating Transnistria through Single Market access, but the settlement leaves Russian leverage embedded inside the state as Moscow seeks to "Transnistrianize" Moldova from within.

Core Developments

Taken together, the scenarios point to three core developments that may shape the Republic of Moldova's security environment in the next four to five years.

First, Moldova remains highly exposed to developments beyond its control, including the trajectory of the war in Ukraine, the future of EU cohesion, Russian strategy, and political dynamics in neighboring states. Second, this external exposure does not eliminate domestic agency. Across the scenarios, there are examples of how political choices by Moldovan actors, institutional resilience, and state capacity shape how external shocks are absorbed and translated into political outcomes. Third, even Moldova's more favorable futures do not produce clean or cost-free solutions. Progress remains partial, often comes with significant trade-offs, and leaves important forms of strategic exposure in place.

Across the scenarios, four vulnerabilities stood out: (1) energy insecurity, (2) corruption and low institutional trust, (3) the credibility of Moldova's European pathway, and (4) the economic pressures driving outmigration.

Participants prioritized these issues, in particular because they recurred across different futures and because they are also areas in which Moldova retains meaningful agency and can take steps to reduce vulnerability and strengthen resilience.

The participants of this scenario exercise advanced four strategic recommendations.

- **Energy security:** reduce dependence through diversification, interconnectors, and domestic production;
- **Institutional trust:** rebuild credibility through professionalization and anti-corruption reform;
- **European pathway:** protect credibility through a staged European integration path, with clear political commitment to Single Market access as an intermediate step, backed by stronger Moldovan communication and lobbying;
- **Outmigration:** mitigate economic drivers through diaspora investment, mentoring, and support for entrepreneurship.

Introduction: Purpose, Scope, and How to Use This Report

This report presents the results of a scenario exercise on Moldova's security and strategic environment in 2030. Its purpose is to support forward-looking policy reflection in a setting marked by geopolitical volatility, strategic uncertainty, and multiple interacting pressures. Rather than asking what will happen, the report examines what could plausibly occur under different combinations of external developments and domestic responses, using scenario analysis as a tool for disciplined thinking under uncertainty¹.

The scope of the report is deliberately focused on Moldova's security futures. It examines Moldova's future through the lens of security policy in a wide sense: not only military and geopolitical dynamics, but also the political, economic, democratic, and social dimensions of Moldova's security. The underlying premise is that Moldova's future is characterized by profound uncertainty, arising from the interplay among a wide array of regional and global dynamics and domestic political and institutional choices.

The report is intended to be used in three ways. First, it can be used to test assumptions. If a current policy rests on a singular reading of Moldova's future, the scenarios help reveal where that assumption may break down if Moldova's future diverges from expectations. Second, it can be used to identify vulnerabilities and prioritize which ones to address. Some vulnerabilities recur even where end states differ sharply. Third, it can be used to support early warning and adaptation by helping decision-makers think more clearly about which signals may indicate movement toward one pathway rather than another². Adaptation includes making use of sudden opportunities. Similar to early warning, the scenarios can help identify signals of positive developments that may require swift, well-prepared political action to exploit.

The scenarios are not predictions, and they should not be read as such. In the foresight literature, scenarios are generally understood as structured descriptions of plausible future situations and the pathways that may lead to them, rather than as probabilistic forecasts of a single expected outcome³. Their purpose is to widen the range of plausible futures under consideration, challenge routine assumptions, and improve the quality of present strategic thinking. This is especially important in volatile political and security environments, where extrapolation from current trends is often misleading.

1 Paul J. H. Schoemaker, "Scenario Planning: A Tool for Strategic Thinking," *Sloan Management Review* 36, no. 2 (1995): 25–40; Keith Wiebe, Monika Zurek, Steven Lord, Natalia Brzezina, Gnel Gabrielyan, Jennifer Libertini, Alistair Loch, Ranjitha Thapa-Parajuli, Joost Vervoort, and Herman Westhoek, "Scenario Development and Foresight Analysis: Exploring Options to Inform Choices," *Annual Review of Environment and Resources* 43 (2018): 545–570, <https://doi.org/10.1146/annurev-environ-102017-030109>; Sarah Bressan and Philipp Rotmann, "Looking Ahead: Foresight for Crisis Prevention," *EU-LISTCO Policy Paper Series*, no. 3 (July 2019), https://gppi.net/assets/bressan_rotmann_2019_EU-LISTCO-POLICY-PAPERS_03.pdf; Paul Flachenecker et al., "Anticipating Foreign Malign Influence in EU Candidate Countries," *REUNIR D7.1 Working Paper* (December 2025), <https://gppi.net/assets/REUNIR-D7.1.compressed.pdf>.

2 Schoemaker, "Scenario Planning"; Celeste Amorim Varum and Carla Melo, "Directions in Scenario Planning Literature – A Review of the Past Decades," *Futures* 42, no. 4 (2010): 355–369, <https://doi.org/10.1016/j.futures.2009.11.021>; Sarah Bressan and Lea Marlene Korb, "Success Factors for Futures Analysis in Foreign and Security Policy (Berlin: Global Public Policy Institute), 2024," https://gppi.net/assets/Bressan_Korb_2024_Foresight-Success-Factors.pdf.

3 Varum and Melo, "Directions in Scenario Planning Literature – A Review of the Past Decades"; Muhammad Amer, Tugrul U. Daim, and Antonie Jetter, "A Review of Scenario Planning," *Futures* 46 (2013): 23–40, <https://doi.org/10.1016/j.futures.2012.10.003>.

This report first outlines the methodological approach and the baseline assumptions that informed the exercise. It then presents four scenarios as distinct but plausible 2030 futures for Moldova, each reflecting a different combination of external developments, domestic responses, and trajectories for Transnistria. Finally, it draws out the main cross-scenario insights and translates them into a focused set of strategic recommendations in those areas where Moldova retains meaningful agency despite wider geopolitical constraints.

How the Scenarios Were Built

Methodologically, the exercise followed a collaborative, facilitated workshop format. Participants first identified a broad set of factors that could shape Moldova's future security environment by 2030. These factors were then discussed, clustered, and filtered using a systematic uncertainty-impact (UI) analysis to identify the uncertainties most likely to have a high impact on Moldova's security trajectory. For each of these "key uncertainties," participants developed contrasting projections. These were combined into distinct scenario frameworks, which participants then elaborated into fuller narratives with end states, chronologies, and political implications. This sequence corresponds to a well-established logic in the scenario literature⁴.

The workshop brought together participants from Moldova and Germany, including government officials, experts, academics, think tankers, and journalists, all with a shared substantive focus on foreign and security policy. This mix was methodologically important. Participatory scenario exercises are valued not only because they generate alternative futures, but also because they bring different forms of expertise into structured dialogue, helping participants surface competing assumptions, broaden the range of plausible developments under consideration, and strengthen collective sense-making⁵.

The scenario exercise was conducted under the Chatham House Rule in order to facilitate open discussion of politically sensitive issues. The scenarios presented here reflect the substance and logic of the workshop discussions but do not constitute a verbatim record. To preserve confidentiality and prevent attribution of individual contributions, some elements were consolidated and adapted.

The resulting scenarios should therefore be understood as plausible, internally consistent thought experiments rather than probabilistic forecasts. As the literature emphasizes, one of the principal functions of scenarios is to challenge tunnel vision, expose oversights, and support strategic conversation under conditions of uncertainty and complexity⁶. That is also the role they play in this report.

After the four scenarios were developed, participants moved into a comparative discussion of vulnerabilities, risks, opportunities, and early warning signs across the scenario set. Common themes were then clustered and narrowed in plenary in order to identify a smaller number of priority fields of action for developing policy recommendations. Because workshop time and resources were limited, participants made a deliberate and pragmatic choice to focus the final discussion on four priority issues rather than on the entire universe of identified vulnerabilities.

The scenario exercise was designed and facilitated by the author together with GPPi colleague Philipp Rotmann.

4 Schoemaker, 1995, "Scenario Planning"; Amer, Daim and Jetter, "A Review of Scenario Planning"; Peter Bishop, Andy Hines, and Terry Collins, "The Current State of Scenario Development: An Overview of Techniques," *foresight* 9, no. 1 (2007): 5–25, <https://doi.org/10.1108/14636680710727516>.

5 Varum and Melo, 2023, "Directions in Scenario Planning Literature – A Review of the Past Decades."

6 Schoemaker, 1995, "Scenario Planning"; Wiebe et al. "Scenario Development and Foresight Analysis: Exploring Options to Inform Choices."

Status Quo of Moldova's Security

Moldova's contemporary security environment is best understood as a consistent balancing act. The country is constitutionally neutral, yet in light of persistent Russian pressure and an unresolved territorial conflict over Transnistria, Moldova's current government is pursuing EU membership and greater security cooperation.

Russian influence in Moldova manifests through two interconnected aspects. First, Moscow maintains about 1,500 Russian personnel in Transnistria. They serve as a tool of coercion that infringes on Moldova's sovereignty⁷. Although their presence does not signal an imminent large-scale invasion, it constrains Moldova's independence and keeps the door open for potential destabilization. Additionally, it allows Moscow to preserve a military presence that could be leveraged in future regional crises. Russia's full-scale invasion of Ukraine highlighted this vulnerability. Had its forces succeeded in taking control of southern Ukraine, Russia could have established a land corridor to Transnistria, and from there, large-scale aggression towards the rest of Moldova could have been possible⁸. While a collapse of the Ukrainian southern front currently seems unlikely, it underscores Moldova's vulnerability to the Russian military.

Second, since military conquest of Moldova currently remains unavailable to Moscow, Russia increasingly relies on a broad spectrum of hybrid and non-kinetic instruments to influence Moldova's domestic political trajectory⁹. This includes disinformation, foreign information manipulation and interference (FIMI), illicit political financing, cyber activities, and proxy networks — all designed to shape public opinion and political outcomes. These efforts intensified during the 2024 presidential election and constitutional referendum. The OSCE identified credible evidence¹⁰ of foreign interference, including coordinated disinformation campaigns and large-scale vote-buying schemes linked to pro-Russian actors. Investigative reporting further documented extensive financial transfers intended to influence voters, underscoring both the scale and the organization of these operations¹¹.

Beyond political interference, Moldova's vulnerability is heightened by structural dependencies in energy and the economy. For years, Russia has leveraged gas supplies through price shocks and supply disruptions, especially after the 2022 Ukraine invasion. Although Moldova has made progress in diversifying its energy sources and joining European markets, it remains economically fragile. Another structural problem in Moldova's economy is its heavy reliance on remittances from its large diaspora. While remittance support stabilizes household incomes, it also highlights the economy's main structural weaknesses, namely the lack of a competitive industrial

7 Bob Deen and Wouter Zweers, *Walking the Tightrope towards the EU: Moldova's Vulnerabilities amid War in Ukraine* (The Hague: Clingendael Institute, 2022, 21–23, <https://www.clingendael.org/sites/default/files/2022-10/walking-the-tightrope-towards-the-eu.pdf>.

8 Emily Ferris, "The Battle for Odessa and Its Railways: Could Transnistria Assist?," Royal United Services Institute (RUSI), *Commentary*, April 3, 2022, <https://www.rusi.org/explore-our-research/publications/commentary/battle-odessa-and-its-railways-could-transnistria-assist>.

9 Isabell Burmester et al., D5.1. Working Paper on Political Threat Assessment in Eastern Neighbourhood & Western Balkan Countries (REUNIR Project, Horizon Europe, January 2025), 60–65, <https://reunir-horizon.eu/wp-content/uploads/2025/02/REUNIR-D5.1-POLITICAL-THREAT-ASSESSMENT-IN-EASTERN-NEIGHBOURHOOD-AND-WESTERN-BALKAN-COUNTRIES-pdf.pdf>.

10 OSCE Office for Democratic Institutions and Human Rights (ODIHR), *Republic of Moldova – Presidential Election and Constitutional Referendum, 20 October and 3 November 2024: ODIHR Election Observation Mission Final Report* (Warsaw: ODIHR, 2025), https://cdn.osce.org/sites/default/files/f/documents/3/9/587451_0.pdf.

11 Constance Victor, "Votes for Sale: How Moldova Can Combat Russia's Election Meddling," European Council on Foreign Relations (ECFR), *Commentary*, October 18, 2024, <https://ecfr.eu/article/votes-for-sale-how-moldova-can-combat-russias-election-meddling/>.

sector capable of generating revenue for Moldova. This also increases vulnerability to external shocks. Collectively, these issues make economic and energy disruptions politically significant and Moldova vulnerable to external threats and market shocks¹².

At the same time, Moldova's political leadership under President Maia Sandu has pursued a clear pro-European course. The opening of accession negotiations with the European Union in June 2024 marked a significant strategic milestone, and cooperation with European partners has expanded in areas such as democratic resilience, cybersecurity, countering hybrid threats, and energy connectivity. This evolving model allows Moldova to strengthen its security ties with Europe without formally abandoning its constitutional status. This trajectory, however, rests on a fragile domestic foundation. Moldovan society remains divided between pro-European and pro-Russian orientations. This reflects enduring identity, linguistic, and historical cleavages¹³. That polarization was illustrated in the 2024 constitutional referendum on EU integration, which passed by a narrow margin.

At present, there is palpable enthusiasm among large parts of Moldovan political elites for EU integration. But this trajectory rests on a thin majority in society. As a result, relatively small changes — whether in the effectiveness of Russian influence operations, domestic political missteps, or shifts in EU engagement — could decisively alter the country's strategic direction. While a full-scale military invasion is currently unlikely, Moldova's security situation remains structurally precarious.

Against this background, the scenarios set out four possible ways Moldova's security environment could develop by 2030. Each starts from the current situation described earlier, but shows how different external shocks, political choices, and developments around Transnistria could lead Moldova's security situation onto a different path. They are not predictions but rather plausible futures designed to help think through risk, vulnerability, and strategic options.

12 Tinatin Akhvediani et al., Resilience of Eastern Neighbourhood & Western Balkan Countries to Socio-Economic Threats, *REUNIR D4.2 Working Paper 10* (June 2025), <https://reunir-horizon.eu/wp-content/uploads/2025/07/REUNIR-D4.2-SO-CIOECONOMIC-THREATS.compressed.pdf>.

13 Bob Deen and Wouter Zweers, 2022, "Walking the Tightrope towards the EU: Moldova's Vulnerabilities amid War in Ukraine."

The Four Scenarios

Scenario 1: Sovereignty for Sale

State in 2030

In 2030, President Le Pen is in office in France, a political “earthquake” that has produced a new configuration in Brussels. Twelve countries are creating the “Patriotic Union.” **Enlargement, for Moldova and anyone else, is off the table** as the Union “reinvents itself.” In the United States, MAGA remains in power under President Vance, whose formal withdrawal from NATO is widely read in Europe as a sign of heightened US disinterest in the region and in standing up to Russian aggression.

Moldova is governed through a transactional bargain with Moscow. The country’s president, Usatîi, has formalized a “€10 billion Eurasia growth plan,” framed as an economic rescue package, though what Moldova is offering in return remains disputed: there are rumors of a secret arms deal and speculation about accession to the Collective Security Treaty Organization (CSTO). Parliamentary power rests with the pro-Russian bloc “Evrazia,” but the settlement is unstable. Civil disorder and resistance dynamics persist, and governance proceeds under conditions of chronic legitimacy stress.

The question of Transnistria is unresolved. Paradoxically, Moldova’s turn toward Russia does not improve the region’s position. The collapse of Moldova’s European integration perspective undermines the EU-facing trade model on which much of Transnistria’s economy depended, while Russia remains unable to establish reliable connectivity to the region due to the absence of a land corridor through Ukraine. As a result, the region becomes increasingly isolated and economically weakened. **Political uncertainty persists, and the long-standing equilibrium around Transnistria gradually erodes without producing a viable alternative.**

Chronology of Events

Scenario 1

- 2026** **Opens with a misleading sense of closure.** That summer, Trump brokers a Russia–Ukraine peace plan and wins the Nobel Peace Prize for it. The agreement creates a pause in open escalation and encourages the perception that the war has been politically contained — a perception that proves consequential because it appears to allow European and American politics to focus inward.
- 2027** **A political turning point.** Europe’s superelection year shifts the bloc’s strategic posture decisively: Le Pen wins the French presidency, the AfD sweeps snap elections in Germany, and enlargement is taken off the agenda as the EU reinvents itself around internal cohesion. Twelve member states initiate a “Patriotic Union” project intended to be established by 2030. For Moldova, this is the moment when accession becomes impossible.
- 2028** **The external security environment hardens.** Vance wins the US presidency and announces NATO withdrawal. Simultaneously, the 2026 peace in Ukraine begins to unravel. Russia breaks the deal and pushes militarily for a corridor reaching as far as Mykolaiv, while an additional foray that seeks to occupy Ukraine’s borderland of Transnistria fails. Inside Moldova, Usatîi wins the presidency as a populist, media-savvy figure whose TikTok-driven rise enables a pragmatic but polarizing pivot toward Russia. This fundamentally reshapes both the terms of political competition and the country’s strategic orientation.
- 2029** **Consolidates the shift electorally, not without resistance.** Parliamentary elections deliver a victory to the pro-Russian bloc “Evrastia,” amid civil disorder. At the same time, the economic foundations of the Transnistrian status quo continue to erode. With the end of EU enlargement prospects, the EU-facing trade model collapses, and with Russia unable to establish a land bridge to Transnistria, the incentives driving Transnistria’s future orientation shift rapidly.
- 2030** **The frozen conflict is not resolved.** Instead, Moldova’s turn toward Russia produces an unexpected consequence for Transnistria. The collapse of Moldova’s European integration perspective undermines the EU-facing trade model that had sustained much of the region’s economy, while Russia remains unable to establish reliable connectivity to the region due to the continued absence of a land corridor through Ukraine. Rather than benefiting from Moldova’s geopolitical reorientation, Transnistria becomes increasingly isolated and economically weakened. The region remains unresolved, but its economic decline and growing fragility add more uncertainty to Moldova’s security environment.

Scenario 2: The Grand Bargain

State in 2030

In 2030, Moldova is a member of the European Union following the 2028 Grand Bargain, through which spheres of influence are established in Eastern Europe. **As part of this arrangement, Moldova's accession proceeded without Transnistria**, which was assigned a special legal status similar to Northern Cyprus: internationally recognized as part of Moldova but operating separately in practice. An external EU border runs along the administrative line, supported by European border management structures.

The European Union has moved toward becoming a defense union, though its capabilities and practical implications remain only partly defined. In this context, **Moldova has adopted “active neutrality” following a national referendum**. The concept is deliberately ambiguous and allows Moldova to remain formally neutral in its security policy while de facto participating in elements of the EU's evolving defense framework.

Russia, facing a major economic crisis and the costs of prolonged confrontation, has adjusted its approach following the Grand Bargain. Under President Vladimir Putin, it now presents itself as satisfied with its territorial expansion and limited gains. Its strategy places less emphasis on military pressure and more on soft-power influence, particularly through narratives centered on traditional values and religion. These narratives continue to play a role in Moldova's domestic political and societal landscape despite the country's EU membership.

Chronology of Events

Scenario 2

- 2026** **A year of stagnation.** The regional situation remains largely unchanged, with no major escalation or breakthrough. Moldova continues to make steady progress on EU alignment. Technical reforms advance, and accession preparations move forward without major disruption.
- 2027** **Multiple crises intensify.** A humanitarian crisis in Ukraine coincides with an economic crisis in Russia and growing economic and social pressures in Europe. Against this backdrop, US-Russia cooperation increases, including new business opportunities. A broader “deal logic” begins to take hold, with greater openness to negotiated arrangements.
- 2028** **A decisive year.** European exhaustion, Russian exhaustion, and a growing US willingness to reach an agreement culminate in the “Grand Bargain,” which establishes spheres of influence across Eastern Europe, stabilizing the conflict through a set of explicit trade-offs. Ukraine remains a sovereign state, but only within the territories it controls at the time of the agreement. Moldova secures its path to EU membership, but only without Transnistria, which is assigned a special legal status similar to Cyprus and remains outside the EU’s legal and economic space. At the same time, the European Union moves toward forming a defense union, initially in rhetorical and institutional terms. Russia, facing a major economic crisis, shifts its strategy. As continued military confrontation becomes too costly, it reduces its reliance on hard power and pivots toward soft power, focusing on narratives such as traditional values and the role of the church. The Grand Bargain also allows Russia to present itself as having regained great power status.
- 2029** **Arrangements are consolidated.** Transnistria’s autonomy is formalized, and a functional external EU border emerges between Moldova and the region. European border management structures, including Frontex, are deployed. The separation becomes institutionalized in practice.
- 2030** **2030 marks the new order.** Moldova joins the European Union, while Ukraine remains outside but continues to make progress toward membership. The EU’s development as a defense union creates a need to reinterpret Moldova’s neutrality. A referendum introduces “active neutrality” as a deliberately ambiguous concept. It allows Moldova to remain neutral while participating in a still-evolving European defense framework. Russia, meanwhile, continues to rely on soft-power influence in Moldova, particularly through narratives centered on traditional values and religion.

Scenario 3: Neutrality Under Duress

State in 2030

By 2030, **Moldova's EU accession track is politically stalled.** The EU has no consensus on Moldova's accession pathway, and veto dynamics dominate; Romania is associated with blocking, together with Hungary. Romania is governed by AUR, the Romanian nationalist party, and it prioritizes UNIRE — the reunification agenda with Moldova. Pressure is applied through coercive leverage rather than persuasion, including threats to cut electricity supplies to Moldova to force reunification. This places a critical dependency at the center of the bilateral relationship.

The broader security setting further narrows Moldova's options. President JD Vance orders the full removal of US troops and assets from Europe, along with the closure of all bases within several years. **NATO is broken.** European states respond by deepening military cooperation through smaller formats of willing member states. In Ukraine, Russia retains a high military capacity but shows a limited appetite for further expansion as it focuses on reinforcing and securing its gains. The conflict is frozen with the front line along the Dnipro River. In Moldova, pro-EU parties lose elections. The country no longer pursues NATO membership and instead turns toward reinforced, internationally guaranteed neutrality, which is advanced internationally at the Munich Security Conference in 2030 with backing from external contributors close to Moscow. **Transnistria remains without a political horizon and stays formally unchanged, while its economy shifts toward a "North Korea"-like model based on crypto schemes, blackmail, and scams, thereby deepening international unpopularity.**

Chronology of Events

Scenario 3

- 2026** **A ceasefire in Ukraine takes hold.** This is accompanied by a Ukrainian election, and this stabilizes a de facto line of control (that is, Russian control) up to the Dnipro River.
- 2027** **The ceasefire has hardened into a frozen conflict.** The front line is now along the Dnipro River. Russia retains a high military capacity but shows a limited appetite for further expansion as it focuses on reinforcing and securing its gains, reflecting an expansion that has reached saturation.
- 2028** **China enacts a maritime blockade of Taiwan.** The US responds economically, and an ensuing global economic crisis disrupts trade and drives up inflation in Moldova. In the US, JD Vance wins the presidency with an isolationist foreign policy platform. In Romania, the downturn produces backlash politics that strengthen AUR; the party becomes more popular and uses an aggressive Moldova policy linked to UNIRE to mobilize nationalist support.
- 2029** **US retrenchment becomes visible.** President Vance orders the removal of all US troops and assets, starting with its nuclear weapons, from Europe. Base closures are to be implemented on an ambitious schedule. NATO is widely described as “broken,” and EU states respond by deepening military cooperation through smaller formats. EU enlargement of Moldova remains blocked, with Romania and Hungary actively obstructing, and the rest of Europe accepting this obstruction amid wider far-right gains.
- 2030** **Romania is governed by AUR and applies coercive UNIRE pressure on Moldova.** This includes threats to cut electricity supplies. In Moldova, pro-EU parties lose elections. The country no longer pursues NATO membership and instead advances reinforced, internationally guaranteed neutrality at the Munich Security Conference, with backing from external contributors close to Moscow. Transnistria remains unresolved and in the status quo, while evolving further into a North Korea-like model based on crypto schemes, blackmail, and scams, deepening international unpopularity without producing a settlement.

Scenario 4: Economic Reintegration, Strategic Exposure

State in 2030

In 2030, the old stalemate around Transnistria has been broken. Moldova's access to the EU Single Market has made reintegration materially attractive and politically possible, and the integration process is now underway. By this point, **Transnistria has an autonomy arrangement, participates in Moldovan political life, and is being integrated into Moldovan state structures.**

The integration package also has a security dimension. Moldovan authorities control the ammunition depot in Transnistria, and Transnistrian troops are being integrated into Moldovan institutions. But the settlement does not remove Russia from the picture. Some troops remain, Russian appetite and capability for disruption stay high, and the risk to Moldova persists. Reintegration is taking place under conditions in which Moscow retains leverage inside Moldova — an effort to “Transnistrianize” Moldova from within. **Moldova is more prosperous and more firmly oriented toward the West, and NATO membership is a popular goal by 2030, though it has not been achieved.**

Chronology of Events

Scenario 4

2026 **The war in Ukraine is frozen.** The year opens with suspended conflict rather than settlement. No clear peace deal is in place, while Europe steps up militarily in response to prolonged instability. In Moldova, this is also the year in which negotiations over access to the EU Single Market begin. What starts as an economic track gradually acquires wider significance, because it creates the prospect of a breakthrough large enough to reshape the long-stalled question of Transnistria. Negotiations on Single Market access unfold alongside movement on Transnistria. Over time, demilitarization becomes possible, and with it a negotiated reduction of the Russian military presence in the region.

2029 **There is a decisive turn.** Moldova secures access to the EU Single Market, and the resulting economic windfall creates the conditions for reintegration to begin. The process is gradual and explicitly linked to economic benefits. A reintegration package takes shape around an autonomy status for Transnistria modeled on the autonomous territorial unit of Gagauzia, Transnistrian participation in Moldova's 2029 elections, Moldovan control over the ammunition depot, and the integration of Transnistrian troops into Moldovan army structures and institutions.

The same year also brings the security shift on which the process depends. Demilitarization of Transnistria is underway, and Russian troop withdrawal is part of the negotiated outcome, with around 1,500 troops leaving. At the same time, the arrangement is incomplete. Some troops remain, Russian appetite and capability stay high, and the risk to Moldova persists.

2030 **Moscow seeks to "Transnistrianize" Moldova.** Moldova is more prosperous and more firmly oriented toward the West, and support for NATO membership has grown accordingly, even though membership itself has not been achieved. While reintegration is underway, it unfolds under continued Russian leverage, as Moscow seeks to preserve influence inside Moldova by "Transnistrianizing" it from within — replacing open military presence with covert influence, narrative control, and a standing claim to defend Russian speakers.

Cross-Scenario Insights and Strategic Implications

The four scenarios present interesting — at times even controversial — standalone storylines, but they also point to patterns that emerge across them. Read comparatively, they highlight a number of recurring dynamics that shape Moldova's future security environment regardless of the specific pathway. Most fundamentally, they show that Moldova is highly exposed to developments beyond its control. Across the four scenarios, decisive shifts originate outside the country: the trajectory of the war in Ukraine, the level of US commitment to European security, the cohesion of the European Union, Russian strategic behavior, and the domestic politics of neighboring states, especially Romania. These factors shape Moldova's room for maneuver. The scenarios, therefore, evidently portray Moldova as operating in a deeply externally conditioned environment.

Simultaneously, the scenario set does not endorse a deterministic interpretation in which Moldova is merely a passive subject of geopolitics. A second conclusion is that Moldova maintains agency, even when subjected to severe constraints. This becomes evident when Moldovan stakeholders' reactions to external events decisively influence scenario developments. In some futures, elites accommodate pressure and intensify dependence through political bargains. In others, they adapt strategically, sustain institutional coherence, or employ economic and diplomatic instruments to forge new opportunities. Moldova may not control the shocks that affect its environment, but it does influence how these shocks are absorbed and, consequently, translated into political outcomes. Therefore, the scenarios highlight a form of constrained agency in which Moldova's future is conditioned by external factors yet not predestined by them.

A third cross-scenario insight is that even Moldova's more favorable futures do not produce clean or cost-free solutions. Even though progress is possible, it is partial and often comes with significant trade-offs. In *The Grand Bargain*, Moldova secures EU membership only by accepting a Cyprus-like separation from Transnistria as part of a wider geopolitical settlement shaped by great-power bargaining. In *Economic Reintegration*, *Strategic Exposure*, Moldova becomes more prosperous, and reintegration begins, but Russian leverage remains embedded in the settlement, and strategic exposure is not eliminated. The common lesson is that even positive trajectories are unlikely to resolve Moldova's insecurity. More plausibly, they will ease some vulnerabilities while leaving others in place, or reduce one form of exposure at the cost of creating another.

Taken together, the scenarios suggest that Moldova's strategic challenge is to manage insecurity under conditions of enduring uncertainty. The implication for policy is that, while Moldova cannot control the external environment, it can reduce the domestic vulnerabilities through which external pressure becomes politically consequential. This is the logic that informs the recommendations that follow.

Policy Recommendations

The recommendations emerged from the workshop's cross-scenario analysis. After comparing vulnerabilities, risks, opportunities, and early warning signs across the four scenarios, participants identified a broader set of recurring pressures and then narrowed them to four priority areas for focused discussion. This was a pragmatic choice, intended to make the exercise concrete and policy-relevant rather than exhaustive. The recommendations that follow should therefore be read as strategic options derived from the comparative logic of the scenarios and focused on those areas where Moldova retains meaningful agency: energy security, institutional trust and anti-corruption, the credibility of the European pathway, and the economic drivers of outmigration.

1. Reducing Energy Dependence Through Diversification and Domestic Production

Energy insecurity emerged as one of the clearest cross-scenario vulnerabilities because it creates a direct channel through which external actors can weaponize infrastructural and production bottlenecks. Moldova remains exposed due to its dependence on imported electricity and gas, including infrastructure linked to Transnistria, and spillover risks from stress on the Ukrainian grid. Across the scenarios, this makes energy a core question of sovereignty and resilience.

The strategic priority is not absolute self-sufficiency in a narrow sense, but rather the progressive reduction of politically exploitable dependence. This requires a combination of accelerated electricity interconnection with Romania, expansion of domestic renewable generation, investment in storage capacity, and broader diversification of gas and electricity supply routes so that one dependency is not merely replaced by another. Participants emphasized that energy policy should be treated as a central component of Moldova's strategic autonomy, not a purely technical sectoral issue.

Recommendation: The Ministry of Energy should treat diversification as a strategic sovereignty priority by accelerating the construction of interconnectors with Romania, expanding domestic renewable energy production, and developing storage and alternative supply options to reduce Moldova's exposure to coercion and disruption.

2. Rebuild Trust Through Institutional Professionalization and Anti-Corruption Reform

Across the scenarios, the weakness of democratic and judicial institutions repeatedly appears as a mechanism through which external pressure is converted into domestic political fragility. Where anti-corruption efforts are seen as selective, politicized, or ineffective, public trust erodes, state capacity weakens, and openings for hostile influence expand. The main goal is to shift from using reform merely as a political promise to establishing lasting institutional practices. This involves bolstering the independence of the judiciary, prosecutors, and anti-corruption agencies; minimiz-

ing their exposure to partisan influence; and implementing strong safeguards for managing public funds and future EU resources. Participants also emphasized that visible institutional integrity is crucial — for combating corruption as well as also for enhancing Moldova’s credibility in its European aspirations and for boosting public trust in the state.

Recommendation: Parliament and the government should strengthen the professional independence of judicial and anti-corruption institutions, with EU support where appropriate, to reduce corruption, rebuild public trust, and protect Moldova’s resilience against political capture and hostile influence.

3. Protect the Credibility of Moldova’s European Pathway

The credibility of Moldova’s European pathway emerged across the scenarios as a decisive variable separating more favorable from more adverse futures. Even where reform continues, prolonged ambiguity or weak signaling from the EU can erode public confidence, weaken reform incentives, and create space for hostile narratives that portray European integration as reversible or illusory. The EU’s commitment and signaling, even where mostly symbolic, therefore has a concrete strategic value.

Participants identified progressive integration into the EU Single Market first, and into the EU later, as the most important intermediate anchor. A clear political commitment to this pathway would generate tangible economic benefits, sustain reform momentum, and make Moldova’s European trajectory more concrete to citizens, even in a context where full accession remains politically contested or delayed.

At the same time, this external credibility must be reinforced domestically through far stronger public communication about the practical benefits of integration and, externally, through more systematic Moldovan lobbying in skeptical EU member states. Communication should be regarded as a strategic political tool for countering adverse narratives and expanding the support base for European integration both inside and outside Moldova.

Recommendation to the EU: The EU should make a clear political commitment to Moldova’s progressive integration. As a first step, membership of the Single Market should be targeted. To make this possible, the EU should prepare the necessary institutional and political groundwork by 2028 in order to sustain reform momentum and preserve the credibility of Moldova’s European pathway.

Recommendation to Moldova: The Moldovan government should treat European integration as a political communication priority by pairing stronger domestic outreach on the concrete benefits of integration with more systematic diplomatic lobbying in skeptical EU member states.

4. Address Outmigration Via Diaspora Investment and Mentoring

Outmigration emerged in the workshop as a structural challenge to Moldova’s long-term resilience. Persistent outward migration reduces the domestic labor force, drains skills and entrepreneurial capacity, weakens the tax base, and risks deepening

the very fragilities that make Moldova vulnerable to external pressure. In that sense, outmigration is not only a demographic or economic problem, but a strategic one.

Participants, therefore, emphasized that the diaspora should be treated as a strategic economic partner. Diaspora capital, expertise, and networks can be mobilized more systematically to support entrepreneurship, mentoring, and local economic development inside Moldova. The aim cannot be to reverse migration altogether, but its negative long-term economic effects should be mitigated by creating stronger channels through which Moldovans abroad can contribute to domestic resilience.

Recommendation: The Moldovan government should build stronger mechanisms for diaspora investment, mentoring, and entrepreneurship support in order to mitigate the long-term economic and demographic drivers of outmigration and strengthen domestic socio-economic resilience.

