



Geopolitical Forecast Report

Ukraine — 2025-2030

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RESEARCH DOCUMENT — FOR ANALYTICAL USE

Executive Summary

By 2030, Ukraine is more likely to be inside the European Union—our probability is roughly 65 percent—than to remain in active conflict, yet the route is precarious. It depends on three simultaneous conditions: a battlefield stalemate that halts major offensives, continued delivery of the security-sector and governance reforms demanded by Brussels, and uninterrupted large-scale financial support from Western governments and institutions. Under this baseline scenario, GDP would rebound for three consecutive years, growing by about 6 percent in 2025, 4 percent in 2026 and 3 percent in 2027. The recovery would be driven by demining of liberated farmland and transport corridors, the return of roughly two million refugees, and the formal opening of EU-accession negotiation chapters, all of which would unlock fresh public and private investment. Should any one of these legs break—if fighting escalates, reform stalls, or external financing is sharply curtailed—the outlook shifts to a frozen conflict. In that case, Ukraine would become a permanently aid-dependent rump state with potential output roughly one-fifth lower than pre-war estimates and martial-law provisions lingering well beyond the immediate crisis.

Forecast Analysis

This forecast was generated using historical data from 2000 to 2025, incorporating 32 primary sources across political, economic, social, and security domains. The analysis proceeds by identifying structural drivers, constructing a small number of internally-consistent scenarios, and translating those scenarios into measurable forecast ranges.

Reasoning

This outlook for 2025-2030 was finalised on 4 January 2026 by integrating evidence collected from 2000-2025. The analysis draws on 32 separate sources covering political, economic, social and security developments, distils the material into a concise set of competing scenarios, and translates the findings into quantified projections. The executive summary reflects the single most probable path—labelled “EU-Accession Rebound” and assigned a 40 % likelihood—while alternative narratives frame both more favourable and more adverse trajectories. All headline numbers are presented as ranges accompanied by an explicit confidence marker; each figure is backed by a scenario-specific rationale. Illustrative calls are: average real GDP growth for 2026-30 of 2.8 %-4.2 %; nominal GDP in 2030 of US\$ 260–310 billion; and the population living in government-controlled territory of 34–37 million. Overall stability is expected to improve, chiefly because martial-law structures are gradually eroding, external finance remains the dominant lifeline, and the demographic base continues to contract. A low-probability, high-impact “black-swan” event is explicitly modelled to test the outer edges of the scenario matrix and to surface possible second-order effects.

Scenario Landscape

EU-Accession Rebound (40% probability)

Front-line stabilises near current map; anti-corruption court passes EU benchmarks by 2027; € 120 bn reconstruction fund unlocked; GDP regains 2021 level by 2028 and grows 3-4 % thereafter.

Key Drivers

- Battlefield stalemate
- Continued Western aid ≥ US\$ 35 bn yr⁻¹
- Anti-corruption convictions ≥ 100 senior officials
- Mine-clearance ≥ 60 % of mined area by 2029

Frozen-Conflict Stagnation (35% probability)

No major territorial change after 2026; defence stays >10 % GDP; EU candidacy frozen over judicial back-sliding; GDP crawls at 1-2 %; poverty stuck ≈15 %; 4 m refugees remain abroad.

Key Drivers

- Military deadlock
- Reform fatigue / presidential over-reach

- Western grant fatigue
- Demographic drain: labour force < 18 m

Escalatory Shock (25% probability)

Neighbour launches new offensive or long-range campaign cripples grid; GDP drops 10 % in a year; EU accession suspended; martial law extended past 2027; refugee outflow tops 1 m additional.

Key Drivers

- Neighbour escalation
- Critical-energy infrastructure loss >30 %
- Donor flow interruption
- Social-cohesion index < 5.0

Key Quantitative Forecasts

| Indicator | Range | Confidence |
|---|---------------|------------|
| Real GDP Growth (Annual Avg 2026-30) | 2.8 % – 4.2 % | Medium |
| Nominal GDP 2030 (US\$ bn) | 260 – 310 | Medium |
| Population in gov-controlled territory (millions) | 34 – 37 | High |
| Public debt / GDP | 78 % – 92 % | High |
| Poverty head-count (%) | 8 – 18 | Medium |
| EU accession chapters opened (of 35) | 10 – 35 | Medium |

Real GDP Growth (Annual Avg 2026-30) — Rationale

Weighted average across scenarios; rebound potential high but war & labour drag remain.

Nominal GDP 2030 (US\$ bn) — Rationale

Base 2025 \$ 205 bn; 25-50 % nominal uplift from growth + moderate hryvnia appreciation if FX controls ease.

Population in gov-controlled territory (millions) — Rationale

Return of 1-2 m refugees offsets low fertility & out-migration; excludes occupied zones.

Public debt / GDP — Rationale

Debt climbs until 2027 grant/loan mix shifts to concessional reconstruction loans; gradual decline only if growth >3 %.

Poverty head-count (%) — Rationale

Falls sharply in accession scenario; stays elevated if conflict frozen or escalates.

EU accession chapters opened (of 35) — Rationale

10-12 likely by 2027; full 35 only under Rebound scenario by 2030.

Stability & Risk Outlook

Trend: improving

Risk Factors

- Martial-law governance erosion
- High external-financing dependency
- Demographic shrinkage
- Mine contamination
- Corruption relapse

Black Swan Stress Test

Event: Catastrophic failure of the Russian-held Zaporizhzhia NPP causing trans-border radioactive fallout and mass internal displacement

Impact: Immediate 5-8 % GDP loss, EU accession freeze, 1-2 m additional refugees, >\$ 50 bn clean-up liabilities

Data Sources

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