



Geopolitical Forecast Report

Russian Federation — 2025-2030

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Executive Summary

By 2030, the Russian Federation is projected to be a demographically-shrinking, highly militarised petro-state locked in a prolonged war of attrition. The economy will remain afloat through hydrocarbon rents and import-substitution strategies, but technological decay and labour scarcity will cap growth below 2%. Power will remain hyper-personalised around the current leader or a silovik successor, with succession representing the single biggest instability vector. Society will be characterised by normalised warfare, increased ethnic homogeneity, and political quiescence, unless a second mobilisation or welfare collapse affects veterans. Geopolitically, Russia will be semi-isolated, reliant on a handful of non-Western partners and grey-market trade. The probability of a forced cease-fire or internal crisis exceeds 50% by late 2025-26, though outright regime collapse remains below 15%.

Forecast Analysis

This forecast was generated using historical data from 2000 to 2025, incorporating 122 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 forecast for the Russian Federation covering 2025-2030 was finalised on 5 January 2026 by integrating evidence collected from 2000-2025. The assessment draws on 122 sources across political, economic, social and security domains, distils the material into a concise set of competing narratives, and translates each narrative into measurable quantitative projections. The executive summary is anchored on the most probable pathway, labelled "Long-Attrition Stalemate", which carries a 45 % likelihood. Alternative scenarios frame both upside and downside deviations from this baseline. All quantitative indicators are expressed as ranges accompanied by an explicit confidence label and are underpinned by scenario-specific reasoning. Illustrative calls include: average GDP growth for 2025-2030 of 0.5 % – 1.8 %; population inside the 1991 borders in 2030 of 138 – 141 million; and military expenditure remaining at 4.5 % – 6.5 % of GDP. Overall stability is judged to be deteriorating, driven chiefly by the absence of a constitutional succession mechanism, the failure to re-integrate veterans, and the combined effect of technology embargoes and accelerating brain drain. A low-probability, high-impact "black-swan" event is also modelled to test the robustness of the scenario set and to surface potential second-order consequences.

Scenario Landscape

Long-Attrition Stalemate (45% probability)

War freezes along current lines after a 2025 mutual exhaustion; sanctions stay but oil & gas still sell at capped prices. GDP growth oscillates 0-1.5 %; military spending stays >5 % GDP; no political liberalisation. Demographic decline accelerates (-0.7 %/yr). Technology gap widens but energy revenues prevent fiscal crisis.

Key Drivers

- Oil price floor USD 55-65
- Western aid to neighbour continues
- No second mass mobilisation
- Leader A alive and in office

Silovik Succession & Managed De-escalation (30% probability)

Leader A exits (health or elite coup) before 2027. A security-service successor declares 'mission accomplished', negotiates a Korea-style armistice, and pivots to domestic 'reconstruction'. Sanctions partially eased; growth rebounds to 2-3 % 2028-30. Veterans' social programmes buy stability. Demographics still negative but emigration slows.

Key Drivers

- Elite consensus on power transfer
- Acceptable frozen conflict terms
- Western sanctions relief post-deal
- Veteran re-integration budget funded

Economic-Technological Spiral (25% probability)

Oil slips <USD 40 or EU/G7 enforcement tightens; hard-currency receipts fall 30 %. Import-substitution fails in critical chips & machine tools; GDP contracts 3-4 % 2026-27. Government imposes capital controls, second mobilisation, and rationing. Social payments cut; veteran & regional protests erupt. Probability of elite fracture >50 %; risk of state failure or disintegration rises to 25-30 %.

Key Drivers

- Oil price collapse
- Technology embargo bite
- Second mobilisation (>300 k men)
- Fiscal deficit >8 % GDP
- Regional / veteran unrest

Key Quantitative Forecasts

Indicator	Range	Confidence
Average GDP Growth 2025-30	0.5 % – 1.8 %	Medium
Population 2030 (within 1991 borders)	138 – 141 million	High
Military Expenditure / GDP	4.5 % – 6.5 %	High
Oil Production (mbd)	8.5 – 9.5	Medium
Share of Renewables in Electricity	1 % – 3 %	High

Average GDP Growth 2025-30 — Rationale

Baseline 1 % under stalemate; +1 pp if sanctions relief; -2 pp under oil shock. Hydrocarbon share of budget stays 25-35 %, crowding out innovation.

Population 2030 (within 1991 borders) — Rationale

TFR 1.35-1.40; median age 44 yrs; net emigration 0.8-1.2 M. War fatalities 150-250 k additional by 2030.

Military Expenditure / GDP — Rationale

Budget documents already lock 5.9 % for 2025; only a peace deal would allow <4 %, which is scenario-conditional.

Oil Production (mbd) — Rationale

Depletion + sanctions technology gap vs. Arctic green-field start-ups; price elasticity dominates volume.

Share of Renewables in Electricity — Rationale

State policy still gas-centric; sanctions freeze access to turbines & finance.

Stability & Risk Outlook

Trend: deteriorating

Risk Factors

- No constitutional succession mechanism
- Veteran re-integration failure
- Technology embargo & brain drain
- Regional fiscal imbalances
- Oil price volatility
- Second mobilisation trigger
- Elite asset freeze abroad

Black Swan Stress Test

Event: Sudden Leadership Vacuum + Simultaneous Regional Rebellion

Impact: Power ministries split within 48 h; two rival emergency councils proclaim authority. One or both lose control of nuclear storage sites; local governors in hydrocarbon-rich regions declare 'temporary resource sovereignty' to keep revenue. Global oil price spikes >USD 120; NATO scrambles response forces. Probability <5 % but impact = systemic shock to global energy and security architecture.

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