

# 2025: NEW FRONTRUNNERS AND LAGGERS IN THE EU ENLARGEMENT PROCESS

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## Introduction

The 2025 Enlargement Package<sup>1</sup> highlights a clear distinction that has emerged over recent years between countries progressing on their EU paths by adopting and implementing reforms and those falling behind for various reasons. For a long time, the EU has applied a regional approach to the Western Balkans and Eastern Europe (“Associated Trio”).<sup>2</sup> It is now clear that a more nuanced approach is needed as differences are growing among the countries and within the two enlargement regions. This paper aims to analyze the current state of readiness of the (potential) candidate countries, the discrepancies, and provide recommendations for the EU to adapt its approach to the new realities. The analysis focuses on the Western Balkan countries and Eastern Europe with aspirations to join the EU. It intentionally does not include Türkiye, whose accession process has been on hold for almost seven years with no prospect of renewal.

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<sup>1</sup> EUROPEAN COMMISSION, *Strategy and Reports – 2025 EU Enlargement Package*, accessed December 22, 2025, [https://enlargement.ec.europa.eu/enlargement-policy/strategy-and-reports\\_en](https://enlargement.ec.europa.eu/enlargement-policy/strategy-and-reports_en).

<sup>2</sup> This regional approach materialized through EU initiatives such as the Stabilization and Association Process or the Berlin Process with the Western Balkans, or the Eastern Partnership. At an institutional level, the division between the two regions, Western Balkans and Eastern Europe, were evident in the separate units of the European Commission dealing with them or separate Council's working groups.

## The State of Play in EU Enlargement in 2025

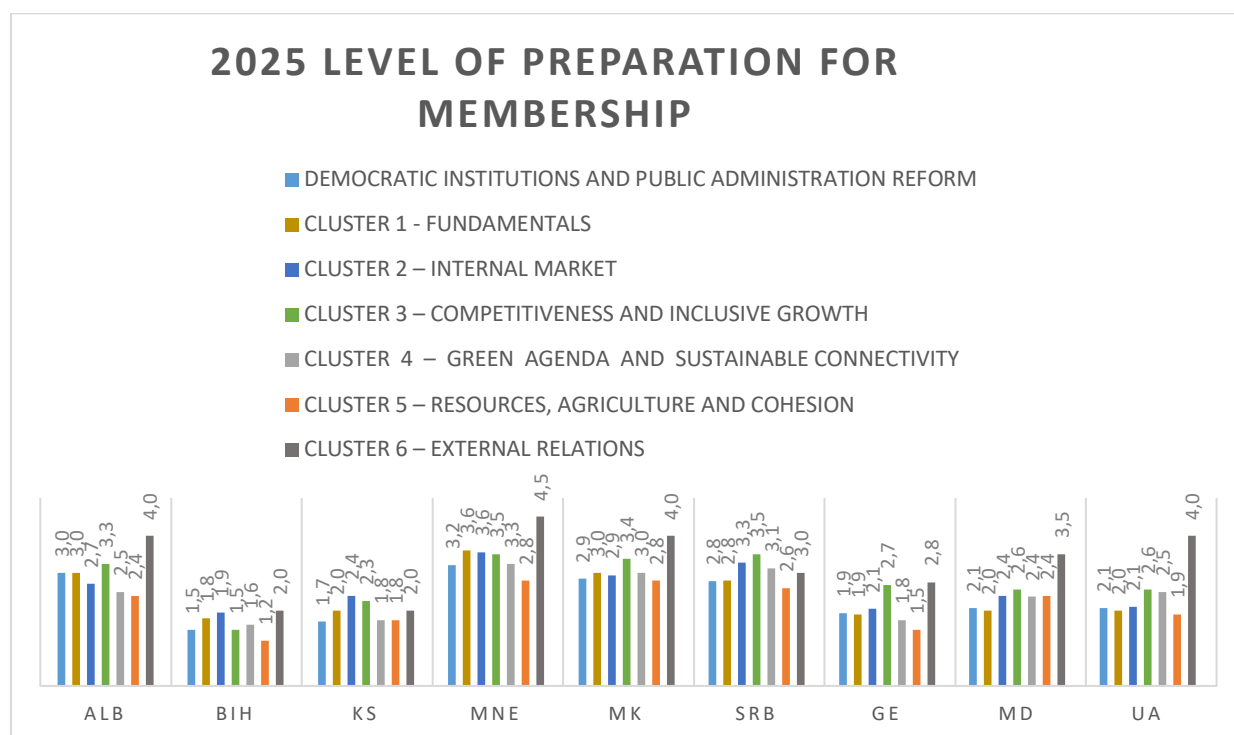
Since 2022, enlargement has been a significant issue on the EU's agenda, with a renewed focus on this policy as a geostrategic priority, as also reflected in the program of the second von der Leyen Commission.<sup>3</sup> A changed geopolitical environment, awareness of the lost credibility of the enlargement process (in the Western Balkans), risks associated with the potential stalling of the European integration of Eastern candidates, particularly Ukraine, and the need for an enlargement “success story” to prove its legitimacy are all driving the ongoing rethinking of the process. The renewed momentum in EU enlargement has helped some of the candidates to pick up the pace of reforms, but had little to no effect on others so far. Overall, 2025 presented a mixed picture, with a clearer distinction between “frontrunners”, “laggers”, and those somewhere in between. An analysis of the 2025 enlargement country reports<sup>4</sup> provides a more detailed picture of the candidates’ level of preparation for membership (Graph 1) and the progress achieved over the past year (Graph 2).

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<sup>3</sup> EUROPEAN COMMISSION, *Political Guidelines 2024–2029*, July 18, 2024, Strasbourg. Accessed December 22, 2025, [https://commission.europa.eu/document/download/e6cd4328-673c-4e7a-8683-f63ffb2cf648\\_en](https://commission.europa.eu/document/download/e6cd4328-673c-4e7a-8683-f63ffb2cf648_en).

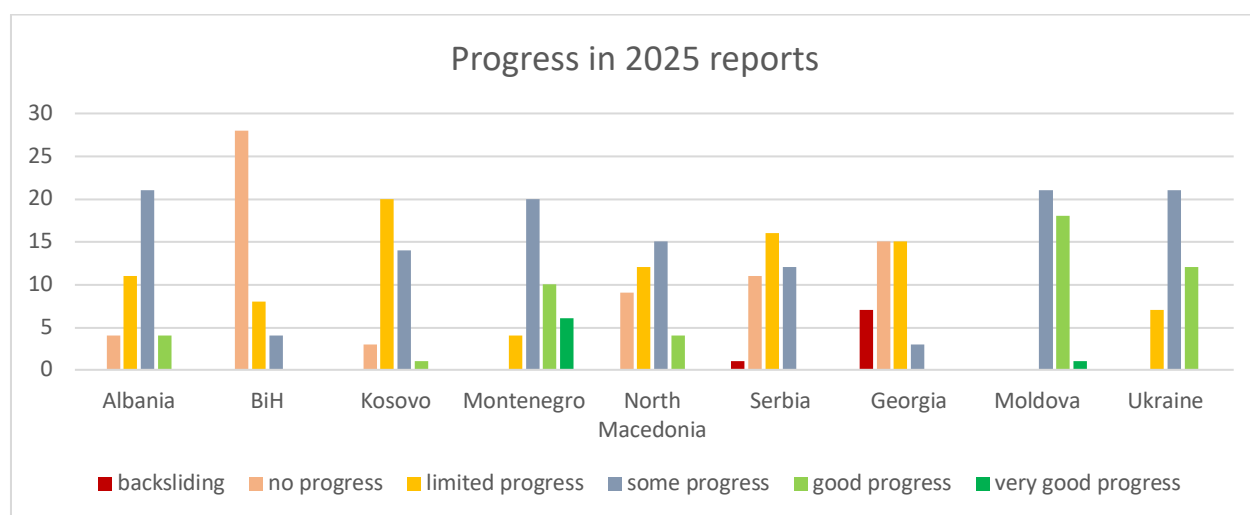
<sup>4</sup> EUROPEAN COMMISSION, *Commission Reports on Progress of Aspiring EU Members*, November 4, 2025, [https://commission.europa.eu/news-and-media/news/commission-reports-progress-aspiring-eu-members-2025-11-04\\_en](https://commission.europa.eu/news-and-media/news/commission-reports-progress-aspiring-eu-members-2025-11-04_en).

Graph 1: (Potential) candidate countries' level of preparation for membership in 2025



(Source: European Commission, 2025 Enlargement Package, data processed by author)

Graph 2: Progress achieved between 2024 and 2025 by individual countries



(Source: European Commission, 2025 Enlargement Package, data processed by author)

## Montenegro: the steady frontrunner

Among all the candidates, Montenegro stands out as the country closest to completing accession negotiations. The country demonstrates preparedness levels across nearly all clusters that fall within the upper range of the "moderately prepared" to "good level of preparation" spectrum.<sup>5</sup> In certain acquis chapters, such as external relations, intellectual property law, public procurement, digital transformation, and science and research, Montenegro achieves levels ranging from "good" to "well-advanced." This indicates a degree of alignment that is uncommon in other parts of the region. Crucially, Montenegro combines this strong acquis alignment with demonstrable reform momentum: the 2025 report finds "good" or "very good" progress in a wide range of areas across 16 chapters, and only a handful of sectors lag behind. This dual advantage of **high alignment and continued reforms** positions Montenegro as a credible frontrunner, and the Commission's own political messaging now explicitly frames it as the most negotiation-ready country. However, for the declared goal of concluding accession negotiations by the end of 2026, sustained and accelerated reforms under the "fundamentals" cluster (notably judiciary, media freedoms, and the fight against corruption and organized crime) are necessary.<sup>6</sup>

## Albania: a newcomer in the first tier

In recent years, Albania has become one of the Western Balkans' most consistent reformers, rewarded by the unprecedented speed of opening all negotiation clusters. While its preparedness levels vary across areas, Albania shows a relatively balanced profile: a relatively good standing on the fundamentals, a solid level of preparedness under Cluster 3 (Competitiveness and Inclusive Growth), and a continued good level of preparation in external relations. Several acquis chapters, including those relating to the

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<sup>5</sup> EUROPEAN COMMISSION, *Montenegro 2025 Report*, Commission Staff Working Document, SWD(2025) 754 final/2, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/9ae69ea7-81d6-4d6a-a204-bd32a379d51d\\_en?filename=montenegro-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/9ae69ea7-81d6-4d6a-a204-bd32a379d51d_en?filename=montenegro-report-2025.pdf).

<sup>6</sup> EUROPEAN COMMISSION, *Albania 2025 Report*, Commission Staff Working Document, SWD(2025) 750 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/fe9138b7-90fe-4277-a12c-3a03f6d1957f\\_en?filename=albania-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/fe9138b7-90fe-4277-a12c-3a03f6d1957f_en?filename=albania-report-2025.pdf).

market economy, energy, and external relations, now stand at a good level of preparation.<sup>7</sup> However, significant weaknesses remain, particularly in agriculture and rural development, food safety, environment and climate change, and aspects of public finance – areas that still hover around levels of “some level of preparation”. The 2025 progress report paints a picture of incremental but steady movement, with most chapters showing at least some progress, but relatively few advancing rapidly. Overall, Albania’s combination of **broad mid-to-upper-range alignment** and **steady, although not impressive, speed of reform implementation** positions it firmly behind Montenegro but ahead of most other Western Balkan candidates. However, to show a convincing track record, Albania still needs to demonstrate meaningful progress on areas lagging behind, such as the fundamentals, especially in the area of freedom of expression, some aspects of Cluster 2 (Internal Market), Cluster 4 (Green Agenda and Sustainable Connectivity), and Cluster 5 (Resources, Agriculture and Cohesion).

### **North Macedonia: technically advanced, politically blocked**

Despite stagnation over the past two years, North Macedonia continues to demonstrate structural readiness for accession that exceeds most other countries in the region. Its level of preparedness across clusters and chapters is generally at the level of “moderate” to “good”,<sup>8</sup> comparable or slightly better than Albania or Serbia and worse than Montenegro (see Graph 1). In eight chapters, North Macedonia reached a “good level of preparedness”, particularly in the areas of market functioning, customs, science and research, and external relations. However, the momentum behind these reforms has slowed considerably. The 2025 progress report records only modest improvements, with more than half of the assessed areas showing limited or no progress and 15 chapters showing “some” progress. The developments highlighted in the 2025 report suggest that the primary obstacle to further progress in the accession process is not technical deficiencies

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<sup>7</sup> EUROPEAN COMMISSION, *Albania 2025 Report*, Commission Staff Working Document, SWD(2025) 750 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/fe9138b7-90fe-4277-a12c-3a03f6d1957f\\_en?filename=albania-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/fe9138b7-90fe-4277-a12c-3a03f6d1957f_en?filename=albania-report-2025.pdf).

<sup>8</sup> EUROPEAN COMMISSION, *North Macedonia 2025 Report*, Commission Staff Working Document, SWD(2025) 753 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/267b368e-6b55-4a42-bb72-6395593de4da\\_en?filename=north-macedonia-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/267b368e-6b55-4a42-bb72-6395593de4da_en?filename=north-macedonia-report-2025.pdf).



but rather the country's **political deadlock over constitutional amendments and bilateral disputes**, coupled with **widespread disillusionment with EU integration**. If these obstacles can be resolved and the badly damaged credibility of the EU and enlargement restored, North Macedonia would be well placed to regain its position as a front-runner.

### **Serbia: advanced on paper, lacking on substance**

Serbia presents one of the most complex profiles in the enlargement package. On the one hand, Serbia's alignment with the EU's internal market, competitiveness, and industrial policies is comparatively strong, with several chapters well advanced. On the other hand, the fundamentals – the rule of law, judiciary, human rights, and media freedom – and alignment with the EU's foreign and security policy – remain substantial chapters where progress remains desired. In chapters 23 and 24, and in areas related to environment and agriculture, preparedness scores remain low.<sup>9</sup> Crucially, in the area of freedom of expression, the 2025 report registered **backsliding**, a trend occurring otherwise only in countries like Georgia or Türkiye. The report underscores this structural imbalance between economic criteria and the fundamentals: despite technical readiness, Serbia recorded no chapters with good progress and a large number with limited progress or stagnation. In the context of EU Member States' concerns about the impact of enlargement on the functioning of the Union, as long as **fundamentals and foreign policy alignment** lag behind the acquis, Serbia will remain unable to capitalize on its high technical preparedness.

### **Moldova: an underdog's impressive progress**

Among the Eastern candidates, Moldova has emerged as a leader in the reform process. Its preparedness scores remain in the lower-to-middle range – generally between “some” and “moderate” level of preparedness, except for external relations, where Moldova

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<sup>9</sup> EUROPEAN COMMISSION, *Serbia 2025 Report*, Commission Staff Working Document, SWD(2025) 755 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/6e68ce26-b95b-48e1-921a-c60c12da8f00\\_en?filename=serbia-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/6e68ce26-b95b-48e1-921a-c60c12da8f00_en?filename=serbia-report-2025.pdf).

stands between “moderate” and “good” level of preparation.<sup>10</sup> However, the progress data under the 2025 report are very encouraging: **Moldova registered good or very good progress in nearly half of all policy areas** and some progress in the rest. No policy area showed stagnation or regression. This pattern reflects the political and institutional consolidation of the country’s European orientation in recent years and suggests Moldova’s ability to overcome the limitations imposed by its lack of institutional and administrative capacity. Despite the lower starting position, Moldova’s reform dynamic matches or surpasses that of many Western Balkan states, and at this pace, it could soon narrow the preparedness gap in some areas with mid-level stagnating candidates such as Serbia. The primary challenges ahead lie in strengthening the rule of law, fighting corruption, addressing vulnerabilities in the economy and public administration, and advancing the adoption and enforcement of *acquis* chapters related to agriculture, the environment, and public finance. However, Moldova’s progress suggests that it could be prepared for the next wave of enlargement in the latter half of this decade or shortly thereafter.

### **Ukraine: strong progress despite war-time constraints**

Ukraine’s preparedness levels in 2025 remain relatively modest, typically between “some” and “moderate” levels of preparation, with notable weaknesses in agricultural, environmental, and internal market areas. However, Ukraine’s **reform momentum in 2025 is positive**, with the Commission recording “good progress” across 12 chapters, “some” improvement in the majority of others, and “limited” in the rest.<sup>11</sup> This is a remarkable achievement given the conditions of war. The current challenge facing the country is not a matter of political will or direction, as both are firmly oriented towards European Union integration. Rather, the focus must be on the ongoing battle against corruption, enhancing administrative and institutional capacity, enforcing rule-of-law

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<sup>10</sup> EUROPEAN COMMISSION, *Republic of Moldova 2025 Report*, Commission Staff Working Document, SWD(2025) 758 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/23fa6af0-89b3-4532-a3d9-d1638727d14c\\_en?filename=moldova-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/23fa6af0-89b3-4532-a3d9-d1638727d14c_en?filename=moldova-report-2025.pdf).

<sup>11</sup> EUROPEAN COMMISSION, *Ukraine 2025 Report*, Commission Staff Working Document, SWD(2025) 759 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/17115494-8122-4d10-8a06-2cf275eecd7\\_en?filename=ukraine-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/17115494-8122-4d10-8a06-2cf275eecd7_en?filename=ukraine-report-2025.pdf).

reforms, consolidating the judiciary, and achieving long-term alignment of agricultural and environmental policies. While Ukraine remains at a lower *acquis* level than most of the current Western Balkan candidates, its pace of progress, if sustained, gives it a realistic chance of catching up in several clusters within a few years. If post-war reconstruction accelerates institutional strengthening, Ukraine could advance toward membership preparedness on a timeline similar to Moldova's.

### **Bosnia and Herzegovina: eternally stuck in an internal deadlock**

Bosnia and Herzegovina remains the least prepared candidate country. Its preparedness scores across nearly all clusters remain in the “**early stage**”, and its *acquis* alignment is structurally weak.<sup>12</sup> Very few areas show meaningful progress, and the vast majority register stagnation, with others showing only minor improvements. Disagreements across entities, institutional fragmentation, and political polarization continue to impede reforms under the “fundamentals” as well as in the economic and sectoral chapters. Although candidate status has created renewed incentives for reform, Bosnia and Herzegovina will **need deep constitutional, institutional, and administrative reforms** before accession negotiations can move meaningfully forward.

### **Kosovo: modest alignment and slow reforms vis-à-vis uncertain future**

Kosovo's profile shares some characteristics with Bosnia and Herzegovina, although Kosovo is somewhat better aligned in the areas of internal market and competitiveness clusters. However, Kosovo's preparedness remains modest, with most chapters oscillating around “some” level of preparedness and none reaching an advanced stage of alignment.<sup>13</sup> Progress in 2025 was also limited: only a single area reached the level of good progress, and the majority showed limited or no improvement. Kosovo's progress is further constrained by unresolved issues in the area of the rule of law and political

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<sup>12</sup> EUROPEAN COMMISSION, *Bosnia and Herzegovina 2025 Report*, Commission Staff Working Document, SWD(2025) 751 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/5d8fc547-f8f8-456f-84e3-b38998acfafe\\_en?filename=bosnia-and-herzegovina-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/5d8fc547-f8f8-456f-84e3-b38998acfafe_en?filename=bosnia-and-herzegovina-report-2025.pdf).

<sup>13</sup> EUROPEAN COMMISSION, *Kosovo\* 2025 Report*, Commission Staff Working Document, SWD(2025) 752 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/127563ea-4c03-44a4-b56c-2d569afd86a5\\_en?filename=kosovo-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/127563ea-4c03-44a4-b56c-2d569afd86a5_en?filename=kosovo-report-2025.pdf).

dialogue with Serbia, which remains a central requirement for any significant advancement in its accession prospects to the EU. Furthermore, after submitting its membership application to the Council in 2022, the inability of the EU to act upon and the continued non-recognition of Kosovo's independence by five EU Member States persists to block any credible European perspective for the country.<sup>14</sup>

### Georgia: caught in a spiral of regression

Georgia's preparedness scores place it broadly in the "early stage to some preparation" category across most clusters, with competitiveness slightly better developed and external relations moderately advanced.<sup>15</sup> Yet, the most striking feature of Georgia's 2025 assessment is the extent of **regression or stagnation** across policy areas: seven areas show explicit backsliding, 15 record no progress, and another 15 show limited progress. Not a single chapter demonstrates good progress. These results reflect growing concerns within the EU about democratic backsliding, rule-of-law deterioration, and diminishing alignment with EU foreign policy. Even though parts of Georgia's acquis – particularly in trade-related chapters – are comparatively developed, the country's **negative reform trajectory** and deliberate diversion from the EU path keep it sidelined in the context of the enlargement process.

### Navigating between geopolitics and democracy

Over the last three years, the EU has made a series of decisions that dramatically expanded and accelerated its enlargement agenda. In December 2023, the European Council agreed to open accession negotiations with Ukraine and Moldova and to grant

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<sup>14</sup> "Kosovo's recognition and candidate status have been set back years by outstanding EU measures," *The New Union Post*, October 21, 2025. Accessed December 22, 2025, <https://newunionpost.eu/2025/10/21/kosovo-recognition-candidate-stuck/>.

<sup>15</sup> EUROPEAN COMMISSION, *Georgia 2025 Report*, Commission Staff Working Document, SWD(2025) 757 final, November 4, 2025. Accessed December 23, 2025, [https://enlargement.ec.europa.eu/document/download/b3089ad4-26be-4c6a-84cc-b9d680fe0a48\\_en?filename=georgia-report-2025.pdf](https://enlargement.ec.europa.eu/document/download/b3089ad4-26be-4c6a-84cc-b9d680fe0a48_en?filename=georgia-report-2025.pdf).

candidate status to Georgia, while signalling readiness to open talks with Bosnia and Herzegovina once it reached a sufficient level of compliance with membership criteria.<sup>16</sup>

In June 2024, Montenegro received a positive Interim Benchmark Assessment Report (IBAR) from the European Commission on chapters 23 and 24,<sup>17</sup> making it the first candidate to reach the stage of closing negotiation chapters. Albania successfully opened Cluster 1 shortly after, in October 2024, and managed to open all negotiation clusters in just over a year.<sup>18</sup>

The political centre of gravity influencing these decisions has shifted. Even member states that are not traditionally enthusiastic about enlargement – including recently presiding countries over the EU, such as Belgium and Denmark – have embraced the language of “geopolitical enlargement” and placed the file high on their Council presidencies’ agendas.<sup>19</sup> This reflects an emerging consensus that widening the Union is essential for its security, resilience, and global influence, not just an expression of solidarity or neighbourhood policy. The overall effect is a far more dynamic enlargement agenda than the region has seen since the early 2000s.

While civil society in the candidate countries welcomes the renewed focus on enlargement, civil society organisations (CSOs) caution that the emphasis on speed and geopolitical signalling should not undermine democratic integrity.<sup>20</sup> The necessity for authentic progress in democratic reforms and their effective implementation, along with

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<sup>16</sup> EUROPEAN COUNCIL, *European Council Conclusions, 14–15 December 2023*, December 15, 2023. Accessed December 22, 2025, <https://www.consilium.europa.eu/media/68967/europeanCouncilConclusions-14-15-12-2023-en.pdf>.

<sup>17</sup> DELEGATION OF THE EUROPEAN UNION TO MONTENEGRO, *Historic Day: Montenegro Receives Positive IBAR*, June 27, 2024. Accessed December 22, 2025, [https://www.eeas.europa.eu/delegations/montenegro/historic-day-montenegro-receives-positive-ibar\\_en](https://www.eeas.europa.eu/delegations/montenegro/historic-day-montenegro-receives-positive-ibar_en)

<sup>18</sup> COUNCIL OF THE EU, *EU opens last accession negotiating cluster with Albania on resources, agriculture and cohesion*, November 17, 2025. Accessed December 23, 2025, <https://www.consilium.europa.eu/en/press/press-releases/2025/11/17/eu-opens-last-accession-negotiating-cluster-with-albania-on-resources-agriculture-and-cohesion/>.

<sup>19</sup> PERMANENT REPRESENTATION OF BELGIUM TO THE EUROPEAN UNION, *Priorities of the Belgian presidency of the Council*, December 15, 2023. Accessed December 23, 2025, <https://europeanunion.diplomatie.belgium.be/en/priorities-belgian-presidency-council>, DANISH PRESIDENCY COUNCIL OF THE EUROPEAN UNION, *Programme of the Danish EU Presidency*, accessed December 22, 2025, <https://danish-presidency.consilium.europa.eu/en/programme-for-the-danish-eu-presidency/programme-of-the-danish-eu-presidency/>

<sup>20</sup> BALKAN CIVIL SOCIETY DEVELOPMENT NETWORK, *Background Analysis 2025*, December 1, 2025. Accessed December 22, 2025, <https://balkancsd.net/novo/wp-content/uploads/2025/12/124-3-BCSDN-Background-Analysis-2025.pdf>.

a call for heightened scrutiny from the European Union, were highlighted in CSOs' responses to the positive IBAR for Montenegro,<sup>21</sup> the (conditional) decision to initiate accession negotiations with Bosnia and Herzegovina,<sup>22</sup> as well as Albania's rapid commencement of cluster openings.<sup>23</sup>

Similarly, in Serbia, a general line of criticism towards Brussels has been that the EU seemed willing to trade democratic principles for short-term stability, significantly aggravated by the controversy around Rio Tinto's lithium mining project Jadar and the EU designating it as a 'strategic project' under the EU's Critical Raw Materials Act.<sup>24</sup> Years of erosion of checks and balances, growing media capture and mounting evidence of high-level corruption were met with relatively muted EU reactions, even as negotiations formally remained open. Despite serious democratic backsliding, Serbia's integration with the Union has continued to advance (for example, through the gradual integration approach and initiatives such as the Growth Plan), an approach described by experts as "stabilitocracy"<sup>25</sup>.

In the context of the student-led mass protests in Serbia and the government's response involving the use of tear gas, mass arrests, reported police brutality, and a smear campaign through government-controlled media, the EU's inaction resulted in a further alienation of the Union among pro-democratically oriented citizens and especially the

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<sup>21</sup> POPOVIC S., "IBAR for Montenegro: A More Political than a Merit-Based Decision," *European Western Balkans*, June 21, 2024. Accessed December 22, 2025, <https://europeanwesternbalkans.com/2024/06/21/ibar-for-montenegro-a-more-political-than-a-merit-based-decision>.

<sup>22</sup> EUROPEAN ECONOMIC AND SOCIAL COMMITTEE, *Bosnia and Herzegovina Must Protect Its Civil Society in Order to Advance towards the EU*, April 16, 2024. Accessed December 21, 2025, <https://www.eesc.europa.eu/en/documents/bosnia-and-herzegovina-must-protect-its-civil-society-order-advance-towards-eu>.

<sup>23</sup> EUROPEAN ECONOMIC AND SOCIAL COMMITTEE, *Albania Demonstrates Its Political Commitment to the EU Accession Path; However, Reforms Still Need to Be Delivered*, December 1, 2025. Accessed December 21, 2025, <https://www.eesc.europa.eu/en/news-media/news/albania-demonstrates-its-political-commitment-eu-accession-path-however-reforms-still-need-be-delivered>.

<sup>24</sup> NATIONAL CONVENTION ON EUROPEAN UNION, *NKEU sent a letter to EC officials regarding the inclusion of the „Jadar“ project in the list of EU strategic projects*, April 1, 2025. Accessed December 21, 2025, <https://eukonvent.org/nkeu-sent-a-letter-to-ec-officials-regarding-the-inclusion-of-the-jadar-project-in-the-list-of-eu-strategic-projects/>.

<sup>25</sup> BALKANS IN EUROPE POLICY ADVISORY GROUP (BiEPAG), *What Is a Stabilitocracy?*, May 5, 2017. Accessed December 11, 2025, <https://www.biepag.eu/blog/what-is-a-stabilitocracy>.

youth.<sup>26</sup> The recent shift in the rhetoric of EU representatives, such as Commissioner Kos, EU Ambassador von Beckerath, and the European Parliament, sends a positive signal to students, citizens, and CSOs that the EU will no longer turn a blind eye to the government's actions.

The EU now finds itself in an uncomfortable position. On the one hand, the EU urgently needs to **rebuild the credibility of the enlargement process**. After years of stagnation and broken political promises, public support for EU membership in the Western Balkans and Eastern Partnership countries depends on the perception that accession is both achievable and genuinely merit-based. The EU's interest and political will to enlarge over the past years have yielded some results in restoring the credibility of the process among Western Balkan citizens. While in 2022, 28% were of the opinion that their country would never join the Union, in 2025, this number dropped to only 17%.<sup>27</sup>

On the other hand, the process can only be credible if it leads to a genuine democratic transformation in line with EU standards by **delivering tangible rewards strictly to those who fulfil the conditions**, particularly in the fundamentals. Rewarding governments that are manifestly backsliding – or blocking progress for those that are moving ahead – undermines both the internal logic of conditionality and the EU's normative power. EU enlargement is an inherently political process, but if the perception prevails that decisions are driven primarily by geopolitical considerations or internal EU deals, the transformative power of the accession process will weaken further.

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<sup>26</sup> QUAEDVLIEG, E., Serbia: past the point of no return?, *Heinrich-Böll-Stiftung European Union*, April 22, 2025. Accessed December 23, 2025, <https://eu.boell.org/en/2025/04/22/serbia-past-point-no-return>.

<sup>27</sup> REGIONAL COOPERATION COUNCIL, *Balkan Barometer: Public Opinion Results*. Accessed December 11, 2025, <https://www.rcc.int/balkanbarometer/results/2/public>.

## Conclusion and way forward

Therefore, the current moment is both an opportunity and a stress-test for EU enlargement, as an endeavour rooted in democratic transformation. The geostrategic imperative has broken the inertia of the 2010s, and enlargement is once again at the top of the political agenda. The EU has demonstrated that progress on the accession path is possible, and following the renewed political will, the Commission has sought innovative ways to restore credibility, provide incentives for reforms, and advance the enlargement process, through approaches such as gradual integration or increased guidance provided to the candidates. However, on the other side, the same geopolitical logic can tempt some EU actors to shortcut conditionality, to tolerate illiberal practices in “strategically important” partners, or to use enlargement decisions as bargaining chips in unrelated disputes. If left unchecked, this would hollow out the EU’s transformative promise and, ultimately, weaken both the Union and its future members.

A credible and sustainable path forward for EU enlargement requires several components:

### 1. Protecting democracy through conditionality before and after accession

Given the central role of the fundamentals, the EU must embed stronger ex-ante and ex-post conditionality mechanisms to safeguard democratic progress in enlargement. Apart from strict conditionality during the accession process, additional pre-accession monitoring and conditionality tied to the fundamentals could be applied to all candidates in the period between the conclusion of negotiations and joining the Union (as was done in the case of Croatia). However, as the ongoing issues with the rule of law in some EU Member States clearly show, pre-accession conditionality is not a panacea, and post-accession conditionality needs to be taken into account as well. While some safeguards included in the accession treaties of new members (as mentioned lately by the European Commission)<sup>28</sup> might be necessary, this step should go hand in hand with the bigger

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<sup>28</sup> “Limiting voting rights for new EU members is not one of the “strong safeguards” the Commission seeks,” *The New Union Post*, November 5, 2025. Accessed December 22, 2025, <https://newunionpost.eu/2025/11/05/voting-rights-new-eu-members-safeguards/>.



question of how to ensure that all EU Member States continue to act in accordance with democratic and rule of law principles, which is part of the larger EU reform discussion. At the same time, the EU needs to tread carefully and avoid creating second-class membership. Any proposal that limits voting rights, especially if the transitional period is vaguely defined, would undermine the political equality of Member States and weaken the accession incentive itself.

## **2. Moving Beyond Intergovernmentalism: Engaging Societies, Not Just Governments**

One of the structural weaknesses of the current model is its reliance on intergovernmental bargaining, which amplifies veto power, politicises conditionality, and sidelines the very communities whose support is needed for reforms.<sup>29</sup> The EU must therefore develop channels that reach beyond governments through enhanced direct engagement with civil society, municipalities, independent institutions, and youth organisations, increasing support for people-to-people exchanges, cross-border cooperation, institutional twinning, and a more proactive public role of EU representatives leading to greater visibility, clearer messaging and diplomatic presence. This also includes more honest communication. The EU's changed approach and rhetoric toward Serbia over the last year,<sup>30</sup> with more explicit signalling and clearer differentiation between the government and society,<sup>31</sup> as well as a structured dialogue with CSOs,<sup>32</sup> illustrates how diplomatic messaging can play a supportive role, engaging civil society and pro-democratic nongovernmental actors.

## **3. Stronger and Smarter Use of Financial Incentives**

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<sup>29</sup> KERMENDI, T., Separate to integrate: EU enlargement and the trouble with bilateral disputes, *European Council on Foreign Relations*, April 8, 2024. Accessed December 22, 2025, <https://ecfr.eu/article/separate-to-integrate-eu-enlargement-and-the-trouble-with-bilateral-disputes>.

<sup>30</sup> "This is not what is expected of a candidate country", *European Western Balkans*, September 9, 2025. Accessed December 22, 2025, <https://europeanwesternbalkans.com/2025/09/09/this-is-not-what-is-expected-of-a-candidate-country/>.

<sup>31</sup> NIKOLOV, K., Kallas in the Western Balkans: between strategic messaging and regional realities, *EUalive*, May 24, 2025. Accessed December 22, 2025, <https://eualive.net/kallas-in-the-western-balkans-between-strategic-messaging-and-regional-realities/>.

<sup>32</sup> EUROPEAN COMMISSION, *Implementation Dialogue with Civil Society on Enlargement*, October 20, 2025. Accessed December 22, 2025, [https://enlargement.ec.europa.eu/news/implementation-dialogue-civil-society-enlargement-2025-10-20\\_en](https://enlargement.ec.europa.eu/news/implementation-dialogue-civil-society-enlargement-2025-10-20_en).

Financial incentives remain one of the EU's most powerful tools, but they must be used strategically. So far, we have seen that initiatives such as the *Growth Plans* have yielded varying results: while in some countries they have helped speed up EU-related reforms, in others there has been little effect or merely technical progress.<sup>33</sup> A possible path to be explored by the European Commission and individual EU Member States is redirecting unused or frozen funds from governments engaged in democratic backsliding toward CSOs, independent media and local authorities. A similar approach was applied by the EU in the case of Georgia and the missed funds due to the country's deliberate diversion from the EU path, but also recently by Sweden in Serbia.<sup>34</sup>

#### **4. Gradual Integration as a Core Incentive, Not a Consolation Prize**

Over the past years, gradual integration has brought significant results and tangible benefits for citizens in candidate countries, not just governments and political elites. At the same time, it provides a credible interim goal for countries temporarily blocked by political vetoes or internal constraints (namely, North Macedonia, Bosnia and Herzegovina, or Kosovo) before the specific obstacles can be resolved. This approach should be advanced further, with the European Commission leading the process of analysis of possible new avenues. All EU institutions should also explore the possibilities of institutional integration of the candidates, for example, through the observer status of national MPs in the European Parliament or the participation of advanced countries in EU-level working groups (notably in CFSP/defence formats for countries fully aligned with EU positions). Crucially, these steps should rely on clear, merit-based benchmarks to ensure that gradual integration remains an incentive for reform, not a substitute for it.

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<sup>33</sup> EUROPEAN COMMISSION, *Western Balkans Leaders' meeting in Tirana takes stock of EU Growth Plan progress two years after its adoption*, November 21, 2025, accessed December 23, 2025, [https://enlargement.ec.europa.eu/news/western-balkans-leaders-meeting-tirana-takes-stock-eu-growth-plan-progress-two-years-after-its-2025-11-21\\_en](https://enlargement.ec.europa.eu/news/western-balkans-leaders-meeting-tirana-takes-stock-eu-growth-plan-progress-two-years-after-its-2025-11-21_en). More detailed information and updates on Reform Agenda implementation in each country are available on the Reform Monitor project website, under <https://reform-monitor.org/project-publications/> (accessed December 23, 2025).

<sup>34</sup> GOVERNMENT OFFICES OF SWEDEN, *Government to review Serbian reform support*, November 4, 2025. Accessed December 23, 2025, <https://www.government.se/press-releases/2025/11/government-to-review-serbian-reform-support/>.

## 5. Addressing Bilateral Disputes: Active EU Mediation and Support for Reconciliation

Bilateral disputes, especially those involving an EU Member State, remain one of the most corrosive obstacles to EU enlargement, effectively undermining the credibility of the EU's enlargement policy and the Union as a whole. While the full elimination of vetoes is politically unrealistic in the short term, the EU has the leeway to play a more active role in the resolution of bilateral disputes. The possibility of offering **structured mediation** – either through the Commission, interested Member States, or respected European personalities – could be beneficial in some cases, although eventually it is up to the countries involved in the dispute whether they would accept such an offer. The European Commission and Member States can also increase their support for local initiatives, educational endeavours, and CSOs engaged in **inter-ethnic dialogue and reconciliation**, both through available funding and sharing of positive examples from other parts of Europe.

## 6. Clear Timelines and Differentiated Support

Finally, the role of predictable timelines and deadlines is crucial for the candidate countries and the question of “when” the next enlargement will happen is becoming more pressing with the ongoing strategic discussions about the EU's internal reforms and the next Multiannual Financial Framework for 2028-2034. Although ambitious, the EU could consider exploring a model similar to the **Luxembourg (1997)<sup>35</sup> and Helsinki (1999)<sup>36</sup> waves** of the 2004/2007 enlargement.<sup>37</sup> This approach, resulting in the first Eastern enlargement of the Union, differentiated in 1997 the two groups of candidates according to their preparedness for membership, opening negotiations with the first group while

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<sup>35</sup> CENTRE VIRTUEL DE LA CONNAISSANCE SUR L'EUROPE (CVCE), *Conclusions of the Luxembourg European Council (12 and 13 December 1997)*, October 24, 2012. Accessed December 23, 2025, [https://www.cvce.eu/en/obj/conclusions\\_of\\_the\\_luxembourg\\_european\\_council\\_12\\_and\\_13\\_december\\_1997-en-8719c6c3-776a-4d6e-8ee5-95dec39eae37.html](https://www.cvce.eu/en/obj/conclusions_of_the_luxembourg_european_council_12_and_13_december_1997-en-8719c6c3-776a-4d6e-8ee5-95dec39eae37.html).

<sup>36</sup> COUNCIL OF THE EU, *Presidency Conclusions Helsinki European Council 10 and 11 December 1999*, accessed December 23, 2025, [https://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/ec/acfa4c.htm](https://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/acfa4c.htm).

<sup>37</sup> The EU's 2004 and 2007 enlargements were shaped by two key milestones: the Luxembourg European Council in 1997 launched accession negotiations with the first group of Central and Eastern European countries and Cyprus, while the Helsinki European Council in 1999 extended the process to additional candidates, thereby structuring the phased Eastern enlargement.

speeding up the preparations with the second “lagging” group and launching the Intergovernmental Conference on the EU’s reform. The Helsinki European Council in 1999 then defined the end of 2002 as the year when *“the Union should be in a position to welcome new Member States as soon as they have demonstrated their ability to assume the obligations of membership and once the negotiating process has been successfully completed,”*<sup>38</sup> giving a tangible **timeline** for the most advanced candidates.

Introduction of a similar **two-wave approach**, relying on an (at least indicative) timeline, closer steering for the lagging countries, and enhanced monitoring accompanied by the gradual integration incentives, could provide more predictability and motivation to frontrunners like Montenegro, Albania, Moldova and Ukraine, while not completely leaving behind lagging candidates and allowing for enhanced, more intentional, and targeted support and guidance for those trailing behind. Crucially, this approach would signal that enlargement is not a zero-sum game but a long-term inclusive process.

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<sup>38</sup> COUNCIL OF THE EU, *Presidency Conclusions Helsinki European Council*.