



A redynamised EU Enlargement Process, but hovering between Accession and the Alternatives

Michael Emerson & Steven Blockmans

28 January 2025

Executive Summary

As reported in the Commission's latest annual '[Enlargement Package](#)', published in October 2024, the last year saw an important new dynamic. But ambiguities and contradictions open up questions about the very nature of the enlargement process.

There emerge two related but partly separate tracks. The first track is the formal accession process with a methodology structured around chapters and clusters. This track saw accession procedures formally started with Ukraine and Moldova - but suspended for Georgia because of adverse political developments. Montenegro was singled out by the [EU Council](#) as making good progress towards accession. Worryingly, there was some dilution of the fundamental values-based criteria due to geopolitical and geo-economic considerations, as in the case of EU support for the controversial lithium mining project in Serbia.

The second track comes under the headings of 'gradual Integration' and 'facilities' with the rapid initiation of 'Growth Plans' for the Western Balkans and Moldova, and the implementation of a big new €50 billion 'facility' for Ukraine. The conditions attached to these financial facilities are very detailed but only partly overlap with the conditions required for the chapters and clusters under the first track.

The relationship between the two tracks raises important issues. While the first track moves very slowly, being subject at every step to unanimous decisions in the Council by all member states, the second track has moved fast with much more reliance on management by the Commission. Also notable are the electoral advances by radical right parties in many member states, some of which are enlargement-sceptic if not anti-enlargement.

In this situation one can imagine two very different scenarios emerging. In a first case the EU member states collectively raise their level of political will to really advance enlargement, with Montenegro to accede relatively soon, confirming an open way for the accession later of other candidates. In a second scenario the accession process is blocked by the exercise of veto powers by individual member states, while the mechanisms of gradual integration continue to develop substantially. These could morph into an alternative transitional system for some time, while the EU clarifies its own future with reforms to its decision-making rules.

1 Accession process

EU enlargement has seen positive developments over the last year. Ukraine and Moldova held their first intergovernmental conferences (IGCs) in June 2024 and the Commission is currently 'screening' their domestic rule book and governance structures in the light of the EU's acquis. For the Western Balkans there has been little movement in the officially rated preparedness for accession. Yet, the EU has been balancing progress for the region with that in Ukraine and Moldova. Negotiation clusters 1 and 6 have been opened with Albania and three chapters have been closed with Montenegro. The latter country nominally met the interim benchmarks in its 'fundamentals' cluster, signalling that negotiations might indeed be wrapped up in 2026. Despite evidence about its continued backsliding on respect for democracy, rule of law and fundamental rights, Serbia also advanced on its pre-accession track, with the December 2024 General Affairs Council approving a letter inviting Belgrade to submit its negotiation positions for Chapters 16 and 19, which are part of cluster 3. It seems that as long as technical conditions are met, geopolitics trump a 'merits-based approach' on fundamentals. This refined salami slicing of the accession process has been applied to Bosnia-Herzegovina too, as the European Council moved it from 'potential' candidate country status in 2022 to the brink of opening accession negotiations in March 2024 without the country having taken any of the relevant steps set out in the Commission's recommendation of October 2022.

The EU's new interpretative tools of the accession process have their limits though, as shown in the case of Kosovo, which continues to languish in 'potential' candidate country status, held back by lack of progress in the EU-facilitated dialogue with Serbia and the continuing non-recognition by five member states of its statehood. As North Macedonia has also experienced most vividly, the prospect of continuing political blockage is ominous - through veto of any of the many steps in the process, either by member states pursuing bilateral agendas, or by generally enlargement-sceptic member states, aggravated by the rise of various radical right parties that are categorically against enlargement.

Below, we unpack several of these key elements, starting with a deeper look at the actual progress recorded by the European Commission in its annual reports, which suggests a bleaker picture than the political statements of the Commission or Council let on.

Performance of the candidate states

Going by [various independent](#) indices as well as our own estimates here, no candidate state is anywhere near completing the course. The criteria for accession are explicit in the rating materials for each of the 37 chapters¹, grouped in 6 clusters, as summarized in Figure 1 and Table 1, with further detail and our methodology in the Annex. The Commission rates each chapter on a scale of five qualitative indications, labelled 'early', 'some', 'moderate', 'good' or 'advanced' preparedness for accession. However, the Commission has never made clear what ratings should be required for accession. For example, one might assume that most chapters should achieve 'good' ratings, and others (subject to post-accession transitional arrangements) should minimally reach a 'moderate' rating, but this is left in the air.

¹ 33 chapters are numbered, with a further 4 chapters not numbered, giving a total of 37, as in the Annex.

The 37 chapter headings for the 9 candidates (excluding Turkey's frozen process) implies a total of 333 chapter ratings. Still, following our modest assumed standard, as of 2024 only 31 reached the 'good' level, while 106 reached only 'moderate' or lower levels. Compared to our [2023 scorecard](#) there has been no progress in the aggregate, with improvements in some cases (Albania, Moldova) offsetting some backsliding elsewhere (Georgia, Serbia).

It is more significant to note the results by individual candidate states, given their range of performance. The candidates present themselves in three broad categories as in Figure 1 – front-runners (blue), laggards (red) and in-betweens (yellow). The Commission is not so explicit in its comments but gives the impression that Montenegro could be close to completing the requirements. In our earlier work on the 'Staged Accession' (Emerson et al, 2021, Mihajlovic et al, 2023) proposal we assumed that an average of moderate ratings (quantified as 3) would only justify moving to a first of several stages before reaching the requirements for accession. The lack of transparency on the part of the Commission over the ratings required for accession is more than a technical weakness – it amounts to a disincentive for the efforts of the candidates to meet the (unspecified) required standard.

Front-runners

The main new development is that the EU Council has adopted in December 2024 very positive language uniquely about Montenegro, designed it would seem to create expectations that a swift accession should now be possible². Montenegro's leadership pushes for 2028, while 2030 is a more frequently cited possible enlargement date in EU debates. In the comprehensive Council statement no other Western Balkan state is given such a positive appreciation, and on the contrary all the others are subject to important criticisms.

In our reading of progress measured by the Commission in its 2024 Enlargement Package (as in Figure 1 and Table 1), there is a compact group of front-runners, with Montenegro averaging a rating of 3.1, North Macedonia averaging 3.0 and Albania averaging 2.9. Thus Albania joins Montenegro and North Macedonia as now a trio of front-runners. Montenegro and North Macedonia have both reached 31 out of the 37 chapters at the 'moderate' or higher level, of which 9 for Montenegro and 7 for North Macedonia were at the 'good' level. Albania is further behind with 23 chapters as 'moderate' or higher level, of which only 3 at 'good' level. Albania showed improvement in 2024 for no less than 6 chapters, including the rule of law as well as economic criteria.

North Macedonia is not given an assessment equivalent to that of Montenegro in the EU Council's recent conclusions because of Bulgarian insistence over matters of political identity. With nationalist parties swinging back into power after the parliamentary and presidential elections in 2024, North Macedonia halted the constitutional reform aimed at meeting Bulgarian demands.

By comparison, Albania's former deadlock was lifted by the release from prison of an ethnic Greek mayor of a southern Albanian town, who was elected to the European Parliament in

² "The Council welcomes the very positive results on the delivery on longstanding reform commitments. The Council commends the government's objective to continue Montenegro's swift advances on its EU path and encourages all political forces to follow their ambitious plan for the closing of the accession negotiations" (emphasis as in the original text).

June despite being held on charges of vote-buying, allegations that were heavily contested by Athens. Tirana's readiness to address concerns over minority rights are also believed to have played a major role in securing the EU's unanimous backing to de-couple the country's position on the pre-accession track from North Macedonia and allow it to open clusters 1 (fundamentals) and 6 (external relations). Albania aims to be ready for accession by 2030, whereas Montenegro's stated goal is to wrap up accession negotiations in 2026 and become the 28th EU member state in 2028. Exerting caution in referring to any concrete timelines, the Commission has politely taken note of these ambitions and declared itself ready to assist in the process.

The accession of Montenegro and Albania together would also shape up nicely as a matter of political geography, with the map of the EU extending the whole of the way down the Adriatic coastline down to Greece³, overlapping with the NATO map of the region.

In-betweens

In this group Serbia gets high ratings on economic criteria but is brought way down overall by its problematic political regime. Ukraine, Moldova and Kosovo show weaknesses on both political and economic accounts.

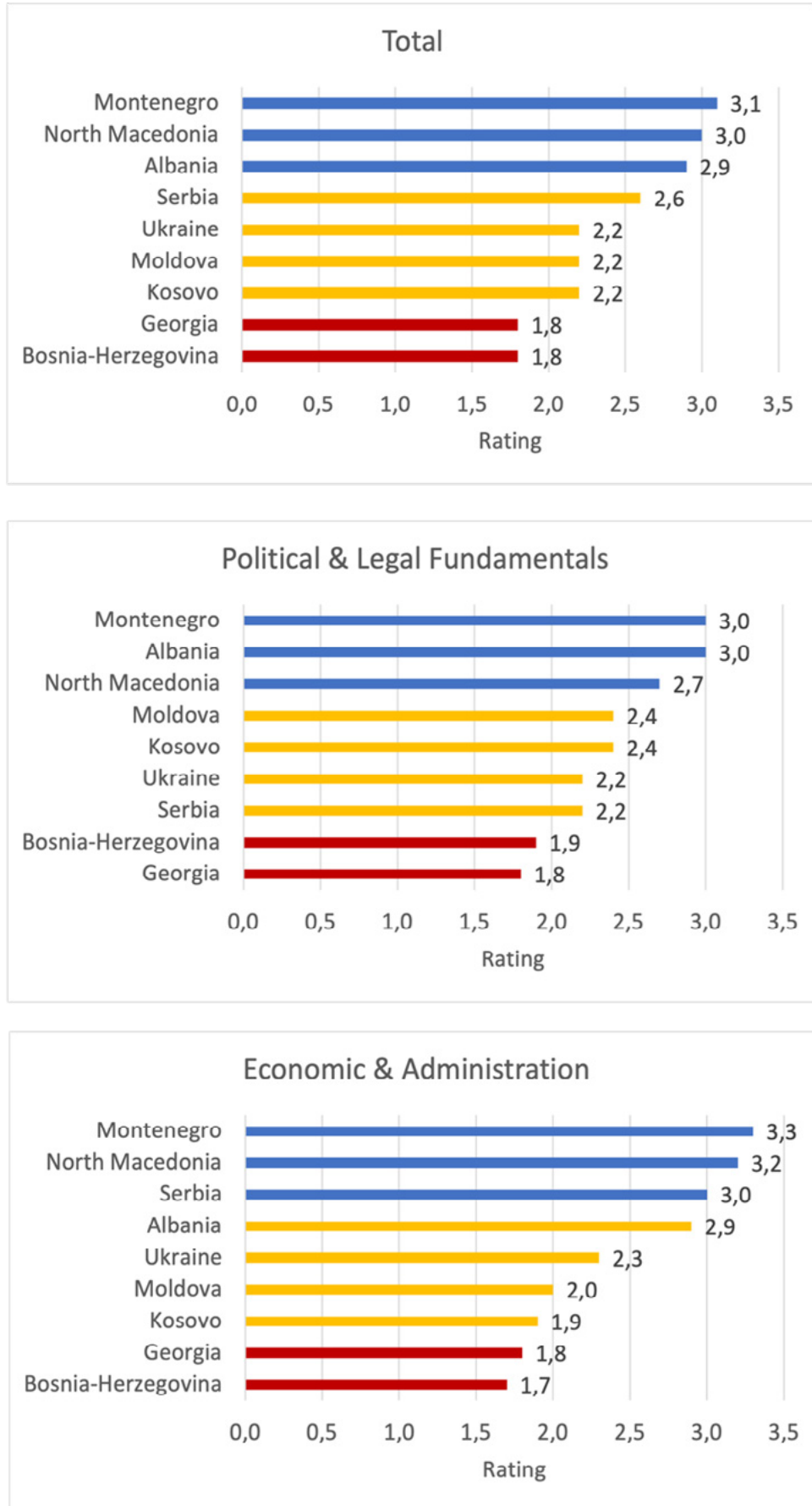
Despite the Hungarian EU Presidency's best efforts to cast a shadow over Ukraine's pre-accession credentials with regard to the protection of minority rights and political conditionality, the country cannot be criticized for suspending elections during the ongoing war. The Commission has welcomed the screening of Chapters 23 and 24 and Kyiv has presented its Roadmap for the Functioning of Democratic Institutions, charting a path out of a more refined martial law regime towards a post-conflict phase with peacebuilding measures that strengthen the general framework of democracy with a view to future EU membership.

Moldova shows notable improvement in rule of law ratings and conducted its presidential election in 2024 correctly. At the same time the country is facing formidable political disinformation and electoral interference from a party led by a criminal oligarch now in exile in Russia, who made a fortune out of the huge 2014 bank fraud. The country remains extremely vulnerable to Russian efforts to create and exploit an energy crisis through the agency of the Transnistrian separatist regime.

Opposite dynamics concern Serbia and Kosovo. Politics are reinterpreting the so-called merits-based approach. Kosovo remains trapped in its 'potential' candidate country status as a result of five EU member states refusing to recognise its sovereignty.

³ Strictly speaking Bosnia and Herzegovina has had its own tiny (10km) stretch of Adriatic coastline at Neum since 1699 when Venice agreed to the Ottoman Empire's demands for an outlet to the sea, thus cutting today's Croatian coastline in half. This is now bypassed by a bridge joining the main Croatian coastline to its Peljesac peninsula.

Figure 1: 2024 Scorecard of candidates' level of preparedness for accession



Source: own computations in Table 1.

Table 1: Summary ratings

	<u>UA</u>	<u>MD</u>	<u>GE</u>	<u>AL</u>	<u>BiH</u>	<u>KOS</u>	<u>MNE</u>	<u>NMK</u>	<u>SRB</u>
Political & legal fundamentals	2.2	2.4	1.8	3.0	1.9	2.4	3.0	2.7	2.2
Democracy	2.4	2.8	1.5	2.9	1.8	3.0	2.8	2.6	1.9
Rule of law & rights	2.0	2.0	2.0	3.0	2.0	1.8	3.2	2.7	2.5
Economics & administration	2.3	2.0	1.8	2.9	1.7	1.9	3.3	3.2	3.0
Economic criteria	1.3	1.5	2.0	3.0	1.3	1.5	3.0	3.5	3.5
Public procurement, statistics	1.7	1.7	2.0	3.0	1.7	2.2	3.3	3.2	3.2
Internal market	2.0	1.8	2.0	2.6	1.9	2.3	3.2	2.9	3.2
Competitiveness	2.6	2.3	2.7	3.0	1.5	2.2	3.4	3.4	3.5
Green agenda	2.5	2.0	1.7	2.1	1.6	1.5	3.3	3.0	3.1
Agriculture, cohesion, budget	1.8	1.2	1.1	2.4	1.2	1.5	2.6	2.8	2.6
External relations	4.0	3.3	1.5	4.0	2.0	2.0	4.0	3.5	2.0
Total, Political + Economic*	2.2	2.2	1.8	2.9	1.8	2.2	3.1	3.0	2.6

*Simple average of the Political and Economic headings

Source: own computations as in Annex Table 1, with some re-arrangement of the headings as explained.

Serbia's disregard for EU values seems to matter less these days. Throughout 2024, anti-government demonstrations have erupted in Belgrade and the country at large. These protests followed on from unrest over election fraud in 2023 and reignited after the government's decision to go ahead with environmentally challenged plans for a lithium mining project and the collapse of a Chinese-built structure in Novi Sad that killed 14 people. Despite [evidence](#) about its continued backsliding on respect for democracy, rule of law and fundamental rights, Serbia has been allowed to advance its pre-accession with the approval of the opening benchmarks assessment report of cluster 3. During a joint press conference in October 2024, Commission President [von der Leyen](#) congratulated Serbia and in particular President Vucic by saying:

“(d)ear Aleksander (...), (y)ou have shown that you can meet the necessary benchmarks. You have committed to delivering on reforms, in particular on the fundamentals, as you just said, of rule of law and democracy. And you have shown that deeds follow your words.”

Lower-ranking EU officials have tried to deflect from this questionable statement by pointing to the fulfilment of many technical standards by Serbia, the country's slowly growing alignment with CFSP decisions (58%, up from 51% in 2023), and the need to balance progress within the Western Balkans region and with the eastern neighbourhood. But compliance with technical standards and geopolitical arguments aside, a more convincing geoeconomic explanation exists: by signing a [strategic partnership](#) on critical raw materials with the Serbian government, the EU is prioritising the future of its electric vehicle industry over Serbian citizens' most basic (health) and political rights. This is a worrying development, whereby the EU becomes complicit to a candidate country's backsliding on the fundamentals. There are concerns that the lithium rush will also further undermine the fragile democracies of other Balkan states at different stages of the EU integration process (e.g. Bosnia and Herzegovina).

Laggards

Both Georgia and Bosnia-Herzegovina now score relatively poorly on both political and economic criteria by a significant margin in comparison with all other candidates. Georgia shows the most significant instance of back-sliding over the rule of law. The rating for Georgia is in serious decline, given the Georgian Dream's government decision to suspend the accession process until 2028, followed by systematic violent attacks against opposition figures, the free media, and pro-democracy demonstrators. Prior to the fraudulent October 2024 elections that triggered this chain reaction, the European Council had already concluded that the ruling party, through the adoption of, among others, a heavily contested foreign agents' law, had de facto halted the accession process.

As for Bosnia and Herzegovina, the European Council in March 2024 decided to open accession negotiations. It invited the Commission to prepare the negotiating framework with a view to its adoption by the Council "the moment all relevant steps set out in the Commission's recommendation of 12 October 2022 are taken". Yet, absent any serious reforms on the part of Bosnia and Herzegovina for the past several years, it appears that its advance along the pre-accession track can only be explained by referring to the balancing argument that has appeared alongside the 'merits-based approach' – thus allowing the country to keep proportional distance from the better performers among the other candidate countries.

As the EU becomes complicit in hollowing out its 'merits-based' approach, in particular by turning a blind eye to the governments' track records on the 'fundamentals', it may be inadvertently aggravating various simmering disputes that have the potential of boiling over into conflict. Bosnia-Herzegovina does not need much to descend into political violence. All it takes is for President Dodik, a self-declared friend of Donald Trump's and recipient of security advice from Moscow, to advance his secessionist agenda for Republika Srpska. Under the banner of a greater 'Serbian World', President Vucic is likely to be supportive and might also feel emboldened to rekindle the flame of irredentist movements in Kosovo.

Performance of the EU and its member states

The political climate in the EU and among member states, as relevant for the enlargement process, is now marked by contradictory developments. On the positive side there was the installation on 1 December of the new Commission, with President Ursula von der Leyen beginning her second term with confirming enlargement among her priorities. As mentioned above, she has gone out of her way to push the file forward.

On the other hand, there are two negatives in the politics of various member states, one in invoking historical grievances, the other seen in new political trends. As to the former, the EU's supreme achievement has been to clean the slate of the huge grievances bequeathed by the two world wars. This precious bequest is largely intact, but still some earlier grievances surface. The most damaging for the enlargement process has been the vetoes applied successively by Greece and Bulgaria blocking the bid for accession by today's North Macedonia. The incredibly complex and violent history of the Balkans during the disintegration of the Ottoman empire should also have been left behind as a relic. After Greece's blackmail to impose addition of North to the country's name 'succeeded' in 2019, Bulgaria took over to assert Bulgarian identity there. From the standpoint of Skopje it would seem that its neighbours have forgotten the triple alliance of Serbia, Greece and Bulgaria to carve up Macedonia in the 1912-13 Balkan war.

It is hardly surprising then that Skopje reacts indignantly to renewed pressures from Sofia. The present Hungarian government also seems intent on returning to history's legacies of Hungarian diasporas, inter alia in Ukraine. These historical nationalisms are poison for the enlarging EU.

There are also uncertainties reflected in the results from the European Parliament elections in June 2024, with the advance of several radical right parties, whose stances have been analysed by [Balfour and Lehne](#). While the positions of these parties on enlargement is far from uniform, the cases of France and the Netherlands warrant particular attention. Both the Rassemblement nationale (RN) in France and PVV party in the Netherlands have stated their opposition to further enlargement and want to roll back the powers of the EU. While President Macron has been continuing with the long-standing French discourse of 'no further widening without deepening', the RN party holds the key in parliament for a new government. In the Netherlands the PVV party of Geert Wilders is now the lead partner in the new governmental coalition. With radical right parties expected to make advances in upcoming elections in other member states, the accession process looks increasingly vulnerable to veto decisions by individual member states at any stage.

There was one official attempt in 2024 to make the accession methodology less encumbered by the unanimity requirement to open and close each chapter/cluster. This was the (unpublished) proposal by Germany and Slovenia to make the opening of chapters subject to Qualified Majority Voting (QMV). This was a modest initiative, leaving the more important closing of clusters subject to unanimity. However, even this proposal failed to win the agreement of the Council, with various member states doctrinally against any increase in QMV voting in the Council and some against enlargement as a general proposition.

2 Gradual integration process

The major development over the past year has been a cascade of actions extending extra financial support for candidate states, conditional on implementation of reform agendas agreed with the Commission. In general, these actions in favour of Ukraine and Moldova as well as the Western Balkans are accompanying but not formally part of the accession methodology, which is more than a technical point (discussed later below).

Together these actions are being referred to as 'Facilities', marking their difference from the formal accession processes and pre-existing instruments of financial support such as the Instrument for Pre-Accession Assistance (IPA III). The Facilities bring mixes of grant and loan funding, the latter obtained by capital market borrowing by the EU, whereas the IPA III consists of grants only. The conditions for the Facilities are broadly related to the criteria for accession but are apart from the specific conditions required for the opening and closing of chapters and clusters. The Facilities are thus bringing in conditional funding with detailed specifics going way beyond what is required under IPA III, while these conditions are not exactly the same as those for the opening and closing of chapters/clusters. These actions exhibit the will and ability of the EU institutions to move fast and substantially to aid candidate states. At the same time they introduce new complexities to the system.

Facilities

Growth Plan for the Western Balkans. May 2024 saw the entry into force of the Growth Plan for the Western Balkans for 2024 to 2027 with a facility of €6 billion (2 billion of grants, €4 billion of loans). This amounts in total to a possible €1.5 billion of funding per annum, which is not far off a doubling of the €2 billion per annum from IPA III⁴. The Western Balkan candidates were invited to submit 'Reform Agendas' along the lines of a broadly common list of priority policy areas:

- Governance – public administration and public finance management
- Energy, green transition
- Digital transition
- Private sector development and business environment
- Human capital, education, training
- Fundamentals – democracy, rule of law, rights, corruption, crime

Albania, Kosovo, Montenegro, North Macedonia and Serbia submitted their Reform Agendas in October 2024⁵, and following positive opinions from EU member states the Commission promptly [published](#) their approval in all cases with their own versions of the agendas. Only Bosnia and Herzegovina failed to deliver so far, signalling this country's governmental weaknesses.

The Reform Agenda documents submitted by the candidate states are extremely detailed, each running to over 100 pages, while the [Commission's texts](#) crucially add an annex listing the precise conditions and timelines to justify half-yearly payments to be made. For example, in the case of [Albania](#) 143 items are listed, each to be implemented at specific points in the half-yearly calendar from 2024 to 2027. This amounts to a huge new political, technical and bureaucratic activity.

The content of the Reform Agendas has a large overlap with the chapters and clusters of the formal accession process – the Serbian agenda is said to contribute to the content of 17 chapters, i.e. half of them. However, there is no formal or precise linkage to benchmarks established for the opening and closing of chapters, or to the ratings contained in the Enlargement Package country reports. There was therefore missed the opportunity to integrate the two processes – accession and Growth Plan – and strengthen the accession process. The conditions, while numerous and detailed, are in some cases feeble – even in some cases a bad joke. For example, [Serbia](#) has the item entitled 'Reform of Justice System', which sounds encouraging until one reads that the reform consist of appointing 10% more judges and public prosecutors.

Of the total €6 billion of funding for the Growth Plan, €3 billion or half will be implemented through the Western Balkans Investment Framework (WBIF), which is a coordination mechanism for pooled project funding of the Commission and the major European investment institutions plus the World Bank.⁶

4 IPA III is endowed with a total of €14.2 billion of budgetary grants for the years 2021 to 2027.

5 The published growth plans of Kosovo, North Macedonia and Serbia are available in the references.

6 European Commission, the Council of Europe Development Bank (CEB), the European Bank for Reconstruction and

This arrangement seems entirely positive as a means to achieve higher leverage for Commission grant or concessional loan funding, and to make use of the implementation capabilities of the major international financial institutions. However, it is not clear to the present authors how or whether the EU's contributions to the WBIF may be subject to the reform agenda conditions adopted under the Growth Plan.

Growth Plan for Moldova

The country was initially excluded from the above-mentioned facility, but in October 2024 the Commission was able to decide a €1.8 billion [Growth Plan for Moldova](#) for the years 2025-2027, modelled roughly on that for the Western Balkans.

Ukraine Facility. Entering into force in March 2024, the major €50 billion Ukraine 'Facility' is to run for the years 2024 to 2027. Agreement of this proposal had been held up by Hungarian opposition, but this was eventually overcome. The design of the Facility is heavily marked by the ongoing Russian aggression and is designed to fund wartime and future post-war reconstruction, investment and maintenance of essential services. It is therefore less concentrated on strictly accession-related themes, although these are also supported.

Sectoral policy integration

An earlier separate but overlapping theme has been that of sectoral policy integration, with efforts to impart fresh momentum to the stalled accession process. Long-standing have been the Energy Community (initiated in 2005) and Transport Community (initiated in 2017) initiatives, working towards application of the energy, climate and transport legislation of the EU by the Western Balkan states. The three East European candidates subsequently joined the Energy Community. Ukraine during Petro Poroshenko's presidency (2014-19) pushed further in this direction when the EU was still denying Ukraine the magic words 'membership perspective'. Several sectoral 'unions' (customs, energy, digital), and partial steps in this direction were worked out for EU-Ukraine cooperation. More recently, political declarations have come from the 2022 Tirana Declaration of Western Balkan states, and the EU Council (surveyed in Emerson and Blockmans, 2023), building on the Digital Agenda for the Western Balkans and the Green Agenda for the Western Balkans launched in 2018 and 2020 respectively.

Since 2022, the listing of sectors for priority treatment became a frequent feature of speeches, political declarations and some 'non-papers' by EU member states aimed at achieving new momentum behind or alongside the accession process. For example, the Czech presidency 'Non-paper on accelerated/gradual integration for COELA capitals' listed 30 EU agencies and programmes with which the Western Balkans have or could have relations.

These various sectoral initiatives remain active, meaning that with also the new Facilities and the formal accession process there are three complex overlapping activities managed by the Commission with the candidate states. For example, the detailed conditions set for funding by the Growth Plan for the Western Balkans have much overlap with both the conditions for advancing the chapters and clusters as well as the various sectoral policy initiatives. The

Development (EBRD) and the European Investment Bank (EIB). The KfW Development Bank (KfW), the Agence Française de Développement (AFD) and the World Bank Group (WBG).

'Brussels Declaration' of the EU-Western Balkan summit of December 2024 devoted no less than 27 pages to an encyclopaedic listing of sectoral developments underway (European Union, 2024). This looks like system overload and poses the question which part of the system is to dominate (see the next section).

3 Assessment – accession versus its alternatives

The President of the Commission, Ursula von der Leyen, has confirmed for her second mandate the priority she attaches to further enlargement of the EU, with geopolitical and security reasoning weighing in on top of the traditional reasoning based on the Treaty. This is reflected in some positive while still limited and ambiguous developments. At the same time the blockage factors limiting progress with the formal accession methodology become all the more ominous. On top of the stagnation of reform efforts of most candidates, and inability of member states in the Council to agree more than minor steps to advance to the process, come now adverse political developments within the EU itself, including the rise of radical right parties.

Already some years ago some analysts were tracking changes in the terms of the debate around enlargement. For example, one author has written about "From Fatigue to Resistance" (Economides, 2020), where opposition to enlargement is no longer focused mainly on the imprecise notion of absorptive capacity, but morphs into opposition based on populism, nationalism and controversy over the very nature and finalité of European integration. More recently the obvious geopolitical threats facing the EU have had divisive impacts on enlargement perspectives, between those seeing it as now a geopolitical necessity versus those leaning towards cooperation with Russia. There has also been a proposal for a new category of neighbouring state that would be called the 'Associate Member State' (Duff, 2022), in which existing association agreements would be enhanced without prospect of full membership for the foreseeable future. As for the candidate states in the Western Balkans, the long ongoing wait since the Thessaloniki Declaration of 2003 - pledging support for accession of the whole region - sees some voices, notably in Serbia and North Macedonia, leaning towards alternatives to enlargement (Bechev and Gjoni, 2024). One author has coined the phrase 'double bluff', with both some EU and some Western Balkan states only pretending to be seriously in favour of enlargement (Lehne, 2023). But the East European candidates are not bluffing. For them accession to the EU is an existential civilisational choice.

The calls over the last three years for a reform of the existing enlargement methodology with a 'Staged Accession' process to create a new positive momentum gained considerable traction in the debate (Emerson et al., 2021; Mihajlović 2023), but this was only partly reflected at the official EU level with the idea of 'gradual integration' described above.

The gradual integration slogan is itself both substantial and ambiguous. There is ambiguity despite the fact that both the Commission and Council have agreed rapidly to do this. The Commission sees it as a way to re-dynamise the enlargement process while the Council cannot agree even to the simplest of proposals to overcome the paralysis of its decision making (notably QMV over intermediate steps). Various member states would seem to view

the Growth Plan for the Western Balkans as serving two purposes, first to advance reforms needed in any case for accession, but secondly also a means to compensate the candidates for their disappointments without doing anything about the fundamental political obstacles to further enlargement. The impression is given of an inter-institutional compromise covering up divergent preferences for the time being.

If the required consensus among member states going beyond the familiar rhetorical statements proves elusive, the gradual integration would likely morph into an enhancement of association arrangements extending indefinitely into the future. As reported above, in the last year some steps in the accession process were unanimously agreed, but these were few in number and mostly far from the final pre-accession decisions. The most encouraging signals have been in favour of Montenegro, but this could be heading towards to a minimal token next enlargement intended just to keep the process still alive.

At the same time there are already in the wider Europe examples how a high level of integration among European democracies can include non-EU states (Norway, Switzerland), with the post-Brexit UK now trying to reset its relationship with the EU from outside. The recently established European Political Community is a soft attempt to encompass all European democracies in cooperative endeavour, which could be built on. Today limited to loosely structured dialogue between top leaders, it could become an inclusive forum for debating also at senior official level all policy issues of common interest. There are many vital sectors of policy where the EU can and does fashion operational arrangements tailored to the specificity of the neighbouring states, which includes the internal market, climate and energy policies, migration and border policies and increasingly defence and strategic security.

The EU continues to develop new domains of cooperation with candidate states apart from the accession process. For example, it initiated with Moldova in May 2024, and with Albania and North Macedonia in October 2024, a new model [framework](#) for security and defence cooperation. These partnerships are comprehensive, covering every conceivable aspect of security policy⁷, even if they will be light in weight. They have been agreed without conditions relating to the accession process.

Positive alternatives in the wider Europe to formal accession to the EU are seen to be possible. It remains to be revealed whether the EU can build substantially on recent advances in the formal accession process, and whether candidate states can raise their games towards meeting the required conditions. If the answer to this question proves to be positive, so much the better. If not, then the time will come to pursue the alternatives without ambiguity at least for a certain political period. In the long run unforeseeable changes will no doubt arrive, including for the EU's own institutional structure, with possible implications for enlargement.

EU officials would contest that gradual integration amounts to a second track, viewing it as part of a single integrated process. However, one cannot deny that in present circumstances the veto power of each member state over the advance and conclusion of further enlargement casts doubts over its plausibility. This means that second-best strategies may have to be

⁷ CSDP missions, hybrid threats, cyber issues, capacity building in security and defence, strategic communications and counter-disinformation, non-proliferation, counter-terrorism, training and education, integrated border management.

considered. The risk of further undermining the accession process is an evident argument. But this has to be set alongside the manifest political impossibility in the EU at the present time to overcome the veto problem, with the alternative risks that the credibility of the EU itself and the motivation of candidate states are both eroded. A transitional period with alternative arrangements may be called for until the EU is able to reform its own decision-making rules.

4 In conclusion: between accession and the alternatives

The status quo for the EU's enlargement process is [unsustainable](#). The new dynamics in the process have certain weight, but they are incomplete and ambiguous. Either both the EU and candidates up their games, or the process will degenerate, with various unfavourable scenarios in the offing (political destabilisation among the candidates, increased alignment with most relevant external actors, weakening of the EU's geopolitical and geoeconomic standing, etc.). But more positive alternatives could be pursued. There could be two positive scenarios:

A mini-enlargement by 2030

The most positive signal currently coming out of Brussels relates to Montenegro, with expectations now created of its possibly swift accession. Significant progress is noted also for Albania, whereas for North Macedonia there is still a political blockage, a barrier that the new Commission is intent on removing. The front-runner Montenegro followed by Albania sees neither country posing intractable political problems, unlike other candidates, coupled to the attractive political geography of the EU extending all along the Adriatic coastline. Both candidates have much work to do to raise their ratings for all chapters and clusters to the required level. Early accession of at least Montenegro would keep the prospect of further enlargement alive. It would still need to be worked out with the most enlargement-sceptic or anti-enlargement member states whether this could be accepted and ultimately ratified by all. The auguries for this are not so good.

Gradual integration

This current political term of art within the EU can be ambiguous. On the one hand official discourse sees it as facilitating the advance of the formal accession process. But if this does not work, then the time could come for a maturing of a common political understanding on how to make the best of integration without full accession, with a smooth continuing development of the mechanisms of functional integration which are already advancing substantially.

It should be obvious to all that the EU is in a stage of profound political uncertainty over its own orientations and systemic future. Today's most worrying features may not last. The current political period will move on to a next stage at some point. In the meantime there is enough initiative and momentum behind the current gradual and sectoral policy integration to be worked up into a mutually beneficial and acceptable set of systemic relationships, at least for a transitional period, while the EU works towards reform of its decision-making rules. The EU already has a plethora of examples how it can open itself up to close neighbours who share its fundamental values.

Recommendations

1. For all candidate states the Commission and Council should be explicit on its merit-based approach, namely on what summary ratings of chapters and clusters (good, moderate, etc) need to be reached for accession, including required average ratings and minimal ratings for individual chapters. There is no room for double standards.
2. The conditions being set for the new 'Facilities' should link clearly to the ratings of chapters and clusters published in the annual Enlargement Package documents, in order to insert 'gradual integration' more explicitly into the accession process .
3. The Council's front-runner assessment of Montenegro's preparations for membership is to be welcomed if this means possible accession relatively soon on condition that the chapters and clusters are sufficiently upgraded. However, the foregoing recommendations are needed to maximise the incentives to undertake the needed reforms.
4. The bilateral disputes involving candidate states and impeding accession, and which fall outside the EU acquis and formal negotiation process, could and should be resolved by the states themselves within facilitating frameworks from the EU or third parties.
5. The new mechanisms of gradual integration backed by 'facilities' could also morph into more formalized alternative relationships for transitional periods if vetoes block the regular accession process.

Annex: Enlargement Package 2024, converted into quantitative ratings

	UA	MD	GE	AL	BiH	KOS	MNE	NMK	SRB
-									
Cluster 1 Fundamentals									
2.1 Democracy, public admin.(*)									
2.1.1 Democracy	2.4	2.8	1.5	2.9	1.8	3	2.8	2.6	1.9
2.1.2 Public Admin reform	2	2	2	3	1.5	2	3	3	3
2.2 Rule of law & rights	2	2	2	3	2	1.8	3.2	2.7	2.5
2.2.1 Ch 23 Judiciary, hum. rights	2	2	2	3	2	1.5	3	2.5	2.5
2.2.2 Ch 24 Justice, free., security	2	2	2	3	2	2	3.5	3	2.5
2.3 Economic criteria	1.3	1.5	2	3	1.3	1.5	3	3.5	3.5
2.3.1 Functioning market economy	1.5	1.5	2	4	1	2.0	3	4	4
2.3.2 Capacity to compete	1	1.5	2	2	1.5	1	3	3	3
2.4 Public procur., stats., finance	1.7	1.7	2	3	1.7	2.2	3.3	3.2	3.2
2.4.1 Ch. 5 Public procurement	2	2	2	3	2	2.5	3.5	3	3
2.4.2 Ch. 18 Statistics	2	2	2	3	1	2	3.5	3.5	3.5
2.4.3 Ch. 32 Financial control	1	1	2	3	2	2	3	3	3
Cluster 2 Internal market	2.0	1.8	2.0	2.6	1.9	2.3	3.2	2.9	3.2
Ch 1 Free movement of goods (TBT)	3	2	2	2.5	1	2.5	3	3	3
Ch 2 Free movement labour	1	1	1	2	2	2	2	1	3
Ch 3 Services, establishment	2	1	3	3	1	3	3	3	3
Ch 4 Free movement capital	2.5	2.5	3	3	3	3	3	3	3
Ch 6 Company law	2	1.5	2	3	2	2	4	4	4
Ch 7 Intellectual property rights (IPR)	2	2	2	3	3	3	4.5	3	4
Ch 8 Competition	2	2	1	2.5	2	2	3	3	3
Ch 9 Financial services	2	2	2	3.5	2.5	2	3	3	3
Ch 28 Consumer, health protection	2	2	2	1	1	1	3	3	3
Cluster 3 Competitive etc	2.6	2.3	2.7	3	1.5	2.2	3.4	3.4	3.5
Ch 10 Digital, media	3.5	2	2	3.5	1	2	4	3	3
Ch 16 Taxation	2	2	2.5	3	2	2	3	3	3.5
Ch 17 Econ. & monetary policy	3	2	3	3.5	1	3	3	3.5	3.5
Ch 19 Social, employment	1	2	2	3	2	1.5	2	3	3
Ch 20 Industrial policy	2.5	2	3	3.5	1	3	4	3.5	3
Ch 25 Science, research	3	3	3	2	2	1	4	4	4
Ch 26 Education, culture	2	2.5	3	3	1	2	4	3	4
Ch 29 Customs union	4	3	3	3	2	3	3	4	4

Cluster 4 Green agenda	2.5	2.0	1.7	2.1	1.6	1.5	3.3	3	3.1
Ch 14 Transport	2	2	2	2	2	1	3.5	3	4
Ch 15 Energy	4	2.5	2	3.5	1	2	4	3	3
Ch 21 Trans-European Networks	2	2	2	2	2	2	3.5	4	3.5
Ch 27 Climate, environment	2	1.5	1	1	1.5	1	2	2	2
Cluster 5 Agri, cohesion, budget	1.8	1.2	1.1	2.4	1.2	1.5	2.6	2.8	2.6
Ch 11 Agriculture	1	1	1	2	1	2	3	3	2
Ch 12 Food safety (SPS)	3	2	1	2	2	2.5	3	4	3
Ch 13 Fisheries	2	1	1	3	1	1	2	3	3
Ch 22 Regional	2	1	1.5	3	1	1	3	3	3
Ch 33 EU budget	1	1	1	2	1	1	2	1	2
Cluster 6 External relations	4	3.3	1.5	4	2	2	4	3.5	2
Ch 30 External relations	4	3	1	4	2	2	4	3	2
Ch 31 CFSP, defence	4	3.5	2	4	2	2	4	4	2

* The democracy line is brought alone into the summary table 1 in the main text because of its fundamental importance. It is for this reason not averaged with (bureaucratic) public administration reform.

Methodology

Wherever possible the numerical ratings are based directly on the Commission's textual ratings in the Enlargement Package documents, where:

- 1 = early stage of preparedness
- 2 = some preparedness
- 3 = moderate preparedness
- 4 = good preparedness
- 5 = advanced preparedness

The exceptions are democracy and external relations, for which descriptive accounts are given by the Commission, but without summary ratings.

Democracy ratings

The Commission provides descriptive analysis for the democracy chapter but for some (unexplained) reason abstains from giving any textual ratings, while citing the results of several independent survey of democracy in an annex. Among these sources Freedom House provides ratings for the most detailed set of subheadings sub-headings, namely:

- A1 Free and fair elections of presidency/prime minister
- A2 Free and fair elections of the parliament
- A3 Electoral laws
- B1 Rights of political parties
- B2 Opposition opportunities
- B3 Freedom from external influence/interference
- B4 Minority rights
- C1 Policy setting according to electoral results
- C2 Government transparency

The table above shows the average ratings of these sub-headings, which are then checked against the sense of the descriptive analysis given by the Commission. No important contradictions are observed.

External relations

The numerical ratings seek to follow the broad sense of the Commission's descriptive analysis and current political developments.

Grouping and weighting

Each chapter is in the first step given an identical weight in the average for its cluster. In a second step the clusters are averaged for the political and economic groupings respectively. This largely follows the distinction between the fundamental and other clusters under the 2020 methodology of the Commission, but with some adjustments. The fundamental grouping has been limited to the most uncontroversially 'fundamental', namely democracy and the rule of law. Other chapters in the fundamental cluster such as statistics have been placed in the economic/administrative grouping.

In the weighting of the two groupings in the aggregate ratings in table the average of the relatively small number of fundamental chapters is given the same weight as the average of the more numerous technical/economic/administrative chapters.

References

Balfour, R., and S. Lehne, eds., *'Charting the Radical Right's Influence on EU Foreign Policy'*, Carnegie Europe, April 2024. <https://carnegieendowment.org/europe/strategic-europe/2024/04/europes-radical-right-is-formidablebut-not-unstoppable?lang=en>

Bechev, D. and I. Gjoni, *'All is not well with EU Enlargement to the Western Balkans'*, Carnegie Europe, October 2024

Duff, A. *Constitutional Change in the European Union: Towards a Federal Europe*, Palgrave, 2022

Economides, S., *'From Fatigue to resistance: EU Enlargement ad the Western Balkans'*, Dahrendorf Forum IV; Working Pare No. 17, March 2020

Emerson, M., M. Lazarevic, S. Blockmans and S. Subotic, *A Template for Staged Accession to the EU*, 2021, CEPS and European Policy Centre (Belgrade)

Emerson, M., and S. Blockmans, *The 2023 Enlargement Package – Major Political Proposals and Glimmers of a Staged Accession Approach*. <https://cdn.ceps.eu/wp-content/uploads/2023/11/the-2023-enlargement-package.pdf>

Emerson, M., and S. Blockmans, *Sectoral policy integration in advance of accession – an alternative or complement to the Staged Accession model?* July 2023, CEPS. <https://cdn.ceps.eu/wp-content/uploads/2023/08/Sectoral-policy-integration-in-advance-of-accession.pdf>

European Commission (1), *Commission adopts 2024 Enlargement Package 2024*. https://neighbourhood-enlargement.ec.europa.eu/news/commission-adopts-2024-enlargement-package-2024-10-30_en

European Commission (2), *Regulation (EU) 2024/1449 of 14 May 2024 on establishing the Reform and Growth Facility for the Western Balkans*. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ%3AL_202401449

European Commission (3), *Growth Plan for the Western Balkans*. https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/growth-plan-western-balkans_en

European Commission (4), *Implementing Decision of 23.10.2024, approving the Reform Agendas and the multiannual work programme under the Reform and Growth Facility for the Western Balkans* https://neighbourhood-enlargement.ec.europa.eu/document/download/3be15620-7ef0-4da7-ba1f-5b126a64ed15_en?filename=C_2024_7375_1_EN_ACT_part1_v3.pdf

European Commission (5), *Annex I to the Commission Implementing Decision approving the Reform Agendas and the multiannual work programme under the Reform and Growth Facility for the Western Balkans*. https://neighbourhood-enlargement.ec.europa.eu/document/download/5b511ed0-b2ba-41c3-905c-74b95ae52c37_en?filename=C_2024_7375_1_EN_annexe_acte_autonome_nlw_part1_v1.pdf

European Commission (6), *Commission adopts €1.8 billion support package to underpin Moldova's economic growth plan on its path to the EU*. https://neighbourhood-enlargement.ec.europa.eu/news/commission-adopts-eu18-billion-support-package-underpin-moldovas-economic-growth-plan-its-path-eu-2024-10-10_en

European Union, *Security and Defence Partnership between the European Union and the Republic of Moldova*, May 2024 https://www.consilium.europa.eu/media/g12nbsvs/security-and-defence-partnership_eu-md_for-website-publication.pdf

European Union, *Brussels Declaration of the EU-Western Balkans Summit, December 2024* <https://www.consilium.europa.eu/media/wvld5ka1/brussels-declaration-2024-en.pdf>

EU Council, *Conclusions on enlargement*, 17 December 2024 <https://data.consilium.europa.eu/doc/document/ST-16983-2024-INIT/en/pdf>

Mihajlović, M., S. Blockmans, S. Subotić and M. Emerson, *Template 2.0 for Staged Accession to the EU*, 2023, European Policy Centre (Belgrade) and CEPS.

Lehne, S. [Serbia-Kosovo Deal Should Boost the EU's Western Balkans Policy](#), Carnegie Europe, 2023

Republic of Kosovo government, *Reform Agenda of Kosovo*. <https://kryeministri.rks-gov.net/wp-content/uploads/2024/10/RGF-Kosovo-Reform-Agenda.pdf>

Republic of North Macedonia, *Reform Agenda of North Macedonia*. https://mep.gov.mk/data/MK_Reform%20Agenda_EN.pdf



Michael Emerson

Associate Senior Research Fellow at CEPS, Brussels.



Steven Blockmans

Associate Senior Research Fellow at CEPS, Brussels.

Thanks are due to Stephan Schitteck and Filippo Marinoni for their assistance.

About SCEEUS

The Stockholm Centre for Eastern European Studies (SCEEUS) at the Swedish Institute of International Affairs (UI) is an independent Centre, funded by the Swedish Government, established in 2021. The Centre conducts policy relevant analysis on Russia and Eastern Europe and serves as a platform and meeting place for national and international discussions and exchanges on Russia and Eastern Europe. Guest Commentaries are written based on the views of the writers and do not necessarily reflect the views of SCEEUS.

Photo: AP/ Andreea Alexandru

Previous SCEEUS Publications

[The Farce of the 2025 Belarusian Elections: Power, Repression, and the Struggle for Legitimacy by Victoria Leukavets](#)

SCEEUS Report No. 1, 2025

[2025 – Time to End Russian Impunity by Klara Lindström](#)

SCEEUS Commentary No. 1, 2025