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The New Growth Plan

Assessing the Value of the Proposed Early Integration Incentives

Introduction

The Western Balkan countries (WB6) have long been entangled in a protracted stalemate in their quest for European Union membership. However, recent geopolitical shifts caused by Russia's attack on Ukraine have thrust the enlargement process back on the EU's agenda as one of the Union's highest priorities, injecting new vigour into the process. In the Spring of 2024, the European Parliament and the Council **adopted** the Regulation establishing the Reform and Growth Facility for the Western Balkans. This milestone also marked the official acceptance of the Growth Plan for the Western Balkans (Growth Plan), a strategic initiative **presented** in the fall of 2023 aimed at revitalising the enlargement process and reducing the economic disparity between the WB6 and the EU. Among other things, it proposed incentives in the form of *early integration* into the single market by providing access to various EU *initiatives* such as programmes, agencies, joint alliances, and more. It was done with the aim to facilitate more opportunities for closer association with the EU's single market already during the pre-accession period.

Building upon the **Model for Staged Accession to the EU**, which underscores the need to provide increased incentives linked to the level of accomplished reforms, this paper aims to assess whether and to what extent the Growth Plan's initiatives can serve as viable incentives for the WB6 governments to implement necessary reforms. The underlying thesis posits that while the proposed incentives add value to the accession journey, they fall short of serving as compelling motivators for the WB6 to enact reforms, particularly considering their accessibility prior to the formulation of the Growth Plan. Therefore, their effectiveness depends on the successful implementation of other Growth Plan components, particularly increased and conditional funding, and the introduction of institutional participation as an additional incentive.



Dissecting the Offer for Participation in Initiatives

As part of the offer to the Western Balkans for integration into the EU's single market,¹ the New Growth Plan points to participation in various initiatives. However, some of the proposed initiatives exhibit a lack of innovation, offering little that is genuinely novel. For instance, the *Convention on Common Transit*, a prerequisite for EU accession, already sees participation from Serbia and North Macedonia, with *Montenegro* progressing toward joining the Convention. Additionally, *Bosnia and Herzegovina* is an observer, while *Kosovo* is hindered by recognition issues, being the only country which faces limitations. The entire Western Balkans participates in the *Horizon Europe* programme, demonstrating a collective engagement. Moreover, the *Fiscalis* programme funds are already accessible, with four out of the six nations having signed agreements to join the programme with Serbia and Bosnia and Herzegovina still in negotiation processes to finalise their participation. Furthermore, although only Kosovo and North Macedonia have officially signed the agreement to join the *Customs* programme, it is noteworthy that all WB6 countries are currently actively engaged in the programme during their ongoing negotiations to join the programme, maintaining consistency with their involvement in the *Customs 2020* programme. Finally, whereas *Bosnia and Herzegovina* is in the process of negotiating its entry into the *Digital Europe* programme, the remaining countries have already *joined*. Thus, as most Western Balkan nations already benefit from or are in the process of engaging with the proposed incentives (see Table 1), their expected incentive impact will be low.

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Beyond the WB6's thorough engagement in the aforementioned programmes, there exists a spectrum of initiatives characterised by varying degrees of appeal and allure. Notably, organisations from Serbia and North Macedonia are a part of the *European Raw Material Alliance* network, whereas one Serbian company is engaged in the *European Battery Alliance*. These alliances are a part of the Critical Raw Material Act and strive to improve dialogue with industrial partners. Membership dynamics in the *European Committee for Standardisation* (CEN) and the *European Committee for Electrotechnical Standardization* (CENELEC) further illustrate disparities, with Serbia and North Macedonia holding full *memberships*, while Albania, Montenegro, and Bosnia and Herzegovina are *affiliates*. *Kosovo's* affiliate applications are currently *pending*. It is noteworthy that these entities are not EU institutions but private non-governmental organisations operating under Belgian law. Additionally, the *European High-Performance Computing Joint Undertaking* (EuroHPC JU) witnesses participation from three out of six WB nations – Serbia, Montenegro and North Macedonia – despite the eligibility criterion being associated with the Horizon Europe programme or Digital Europe, where all WB6 are participating. On the other hand, the *European*

	ALB	BIH	KOS	MKD	MNE	SRB
Convention on Common Transit	No progress as of 2021	Observer	Progress hindered by recognition issue	Joined the Convention	Joined the Convention	Joined the Convention
Horizon Europe	Associated state	Associated state	Associated state	Associated state	Associated state	Associated state
Fiscalis programme	Participant	Finalising negotiations	Participant	Participant	Participant	Finalising negotiations
Customs programme	Participant	Participant	Participant	Participant	Participant	Participant
Digital Europe programme	Participant	Negotiating to join	Participant	Participant	Participant	Participant

Table 1 – Initiatives of the Growth Plan with a high degree of WB6 participation

1 The issues of single market integration, such as the ACAA, Green lanes, reduced roaming charges, and others, are outside this paper's scope. For more, see CEP's *paper on sectoral integration opportunities*, which highlights that there are legal avenues under the Stabilisation and Association Agreement (SAA) legal framework to extend the internal market treatment to products from WB countries though, for example, the Agreements on Conformity Assessment and Acceptance (ACAA). It is noted that they provide for mutual acceptance of industrial products under the condition of alignment with relevant EU acquis.

Union Agency for Cybersecurity (ENISA), while open for participation, has not attracted notable interest from any WB6, although there were calls by the organisation to participate as observers. For the time being, only Serbia and Montenegro have established a certain level of cooperation. Therefore, the varied participation levels in the proposed initiatives suggest that the incentives may not be universally appealing to all WB6 nations (see Table 2). The reluctance demonstrated by some implies that these incentives might not be compelling enough or that certain countries perceive limited benefits in joining these initiatives.

	ALB	BIH	KOS	MKD	MNE	SRB
European Raw Material Alliance	No members in the network	No members in the network	No members in the network	One member in the network	No members in the network	One member in the network
European Battery Alliance	No members in the network	No members in the network	No members in the network	No members in the network	No members in the network	One member in the network
CEN	Affiliate	Affiliate	Application pending	Member	Affiliate	Member
CENELEC	Affiliate	Affiliate	Application pending	Member	Affiliate	Member
EuroHPC JU	Not a member	Not a member	Not a member	Member	Member	Member
ENISA	Not a member	Not a member	Not a member	Not a member	Cooperation established	Cooperation established

Table 2 – Initiatives with varying degrees of WB6 participation

The feasibility of WB6 participation in certain proposed initiatives comes into question, raising concerns about the practicality of their inclusion. For instance, the *Single Euro Payments Area (SEPA)* participation criteria are attainable but would necessitate reforms in the fields of banking and payments. All WB6 have shown interest in joining, with **Albania** and **Montenegro** even planning to apply in 2024. Serbia, which is currently **preparing its application**, stands out with its well-advanced banking system, along with meeting the criteria regarding the competition policy, implying that it would not require extensive time to enact certain necessary reforms.² Although SEPA seems attainable, the *Internal Market Information System (IMI) regulation* does not explicitly address non-EU member participation, casting uncertainty on WB6 participation. The case is the same with the *European Register of Road Transport Undertakings (ERRU)*, whose *Regulation* also lacks clarity regarding the possibility of non-EU participation. Additionally, the *Communication on Enhancing the European Administrative Space (ComPact)*, an initiative introduced in October 2023, demonstrates ambiguity. The general provisions suggest potential benefits for EU candidates on their path to building better public administrations, while the communication indicates

assistance for EU enlargement countries without specifying the mechanisms or possibility for their active involvement. In conclusion, with the exception of SEPA, the Western Balkans might face challenges in enjoying the promised benefits under the current framework, potentially perceiving them as unfulfilled assurances (see Table 3). Addressing these concerns could potentially necessitate adjustments by the EU to make full participation of the WB6 a tangible reality.

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	Legal basis	Possibility for participation	Conditions
SEPA	Regulation (EU) No 260/2012	Yes	European Payments Council's set of conditions, which require reforms in payment services and banking system
IMI	Regulation (EU) No 1024/2012	Not mentioned in the Regulation	
ERRU	Regulation 1071/2009 and Commission Implementing Regulation (EU) 2016/480	Not mentioned in the Regulation	
ComPact	European Commission's Communication	Yes	Not given

Table 3 – Initiatives with uncertain access feasibility for WB6

² Although the 2023 *Serbia progress report* states that the overall alignment with Chapter 8 – competition policy is moderate, the alignment is higher regarding the SEPA criteria.

Zooming into Relevant Case Studies

Single Euro Payments Area (SEPA)

Out of the proposed incentives, the **Single Euro Payments Area (SEPA)** sticks out as the one from which citizens would benefit the most as it allows customers to make cashless euro payments – via credit transfer and direct debit – to anywhere in the EU, as well as a number of non-EU countries (a total of 36 members), in a fast, safe and efficient way, just like national payments. SEPA was **introduced** for credit transfers in 2008, followed by direct debits in 2009. By 2014, it was fully implemented in the euro area, and by 2016, in non-euro area SEPA countries. The payment integration triggered by SEPA has contributed to the efficiency and competitiveness of the European economy as a whole by eliminating differences between national and cross-border payments by harmonising standards in all participating countries. The European Payments Council (EPC) serves as the formal and fundamental governing body of SEPA schemes. It is responsible for making decisions on SEPA applications and establishing the participation **criteria**. Those require strong relations with the EU, ensuring an equal playing field with other participants along with other market, financial and regulatory criteria. SEPA was initially proposed to the WB6 within the **Economic and Investment Plan for the Western Balkans** back in 2020. The absence of their membership in SEPA since then suggests that participation in SEPA is not easily attainable. Nonetheless, given the evident interest from the WB6, and strong push from the EU, their accession to SEPA could become feasible in the near future with adequate political backing.

European Union Agency for Cybersecurity (ENISA)

Given the critical nature of cybersecurity, it would be expected that ENISA would be appealing to the WB6. This gains significance due to the recent cyber-attacks suffered by some WB countries. For example, **EPS**, a Serbian electric power utility company, was attacked by hackers in December 2023, while in 2022, a **cyber-attack on Montenegro's state infrastructure** paralysed the government for months. However, no WB6 county has so far decided to conclude the agreement with the agency. ENISA is the EU agency dedicated to achieving a common and high level of cybersecurity across Europe. Established in 2004 and strengthened by the EU Cybersecurity Act, it contributes to EU cyber policy, enhances the trustworthiness of ICT products, services and processes with cybersecurity certification schemes, cooperates with Member States and EU bodies, and helps Europe prepare for the cyber challenges of tomorrow. ENISA is **open to the participation** of third countries that have concluded agreements with the Union, which specify working arrangements, in particular, the nature, extent and manner in which those third countries are to participate in ENISA's work. ENISA has been calling for the WB6 to engage with the organisation as observers. So far, **Montenegro** established cooperation with ENISA in 2023. Serbia also has cooperation with ENISA, participating in one working group and several **study visits** were conducted between the two. However, one can assume that the lack of alignment with the EU's Common Foreign and Security Policy (CFSP) could pose a challenge to Serbia's participation as an observer. Having in mind that according to the latest EU annual reports, the level of preparedness of the WB6 in the negotiating chapters dealing with cybersecurity is **moderate at best**, membership in ENISA could expedite reforms and help the region meet its cybersecurity requirements more efficiently.

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European Committee for Standardisation (CEN) and European Committee for Electrotechnical Standardization (CENELEC)

Given that EU standards typically surpass those of the WB6, citizens and residents of the region stand to gain significantly from elevated norms. This alignment not only raises the overall quality of standards but also facilitates smoother and more advantageous economic interactions, particularly in business transactions with the EU. CEN and CENELEC, along with ETSI, are **European standardisation** organisations that have been officially recognised as a European standards body by the EU and the European Free Trade Association (EFTA) as being responsible for developing and defining voluntary standards at the European level. Although they are not EU institutions, but non-governmental organisations registered under Belgian law, they work closely with the Union and their standards are officially recognised by the EU and EFTA, providing a platform for the development of European standards and other technical documents in relation to various kinds of products, materials, services and processes. Thus, membership in CEN and CENELEC provides the Western Balkans with a framework for aligning with European technical standards, fostering economic development and promoting regional and international trade. The current alignment of WB6 with CEN and CENELEC standards is noteworthy, with **Serbia**, for instance, aligning with 99.39% of the former and 91.46% of the latter. Moreover, Serbia actively participates in the work of these organisations and even hosted the CEN/CENELEC annual meeting in 2023. This high level of alignment reflects the capacity of the WB to meet European standards, further positioning the Western Balkans as a reliable and compatible partner in the European marketplace.

Extending the Scope of the New Growth Plan

There are additional EU agencies and programs that, under current legislation, could potentially involve the WB6 in their activities. This expansion would broaden the reach of the Growth Plan and facilitate the early integration of the region into the single market. Notably, the *European Securities and Markets Authority* (ESMA) welcomes the participation of third countries. The *European Union Intellectual Property Office* (EUIPO) offers the opportunity for third countries to join the management board as observers. Similarly, the *European Labour Agency* (ELA) allows non-EU and non-EEA observers to attend the platform meetings, with their inputs duly considered. Additionally, the *European Centre for the Development of Vocational Training* (Cedefop) is open to WB participation. While there exists some level of cooperation between certain WB6 countries and the *Agency for the Cooperation of Energy Regulators* (ACER) and the *European Foundation for the Improvement of Living and Working Conditions* (Eurofound), this cooperation could be elevated to observer status within their respective management boards. Moreover, the region could also be included in the two programmes, *Connecting Europe Facility* (CEF) and *InvestEU*, which are open to participation for candidates and those aspiring EU membership. Having this in mind, the EU could also offer these and thus supplement the Growth Plan. Those proposals have the potential to be appealing to the WB6 and give them additional motivation to conduct reforms in addition to speeding up their early integration into the single market.

European Labour Authority (ELA)

ELA was established in 2019 in order to contribute to ensuring fair and effective labour mobility across the EU while assisting Member States and the European Commission in coordinating social security systems. ELA is committed to facilitating practical and collaborative solutions that benefit workers, employers, and stakeholders at both the national and EU levels. The organisation achieves its objective by facilitating access and exchange of information labour mobility, supporting EU members in promoting cross-border job matching, capacity building and tackling undeclared work, coordinating and supporting concerted and joint inspections as well as carrying out analyses and risk assessment on issues related to cross-border labour mobility. Additionally, ELA has the flexibility to establish working groups to address specific tasks or policy areas, in line with the Agency's founding regulation. Currently, ELA has four dedicated working groups, where representatives from Member States, the EC and social partners share their expertise on dedicated subjects. As the *ELA regulation* foresees the possibility for third countries' participation and considering that workers from the WB will gain access to the EU labour market upon joining the EU and migrate to more developed EU states, the inclusion of the WB6 countries in ELA's activities prior to their accession could prove mutually beneficial. This proactive engagement would facilitate smoother integration into the EU labour market and contribute to the effective functioning of labour mobility.

Agency for the Cooperation of Energy Regulators (ACER)

Established in March 2011, ACER operates as an independent body dedicated to advancing the integration and completion of the European Internal Energy Market for both electricity and natural gas. ACER's purpose is achieving a transition of the European energy system in line with the political objectives set, reaping the benefits of increased energy market integration across Europe, and securing low-carbon supply at the least possible cost for European businesses and citizens. The Agency actively promotes a more competitive and integrated energy market, offering consumers increased choice, a streamlined energy infrastructure, and efficient networks. By enabling the free movement of energy across borders and facilitating the integration of renewable energy sources, ACER contributes to a higher degree of security of energy supply. Furthermore, it ensures a monitored and transparent energy market, safeguarding consumers against unfair pricing practices and market abuses. Article 43 of the *Regulation establishing ACER* specifies that the organization is open to the participation of third countries that have concluded agreements with the European Union and have adopted and implemented relevant Union law in the field of energy. Among the WB6, *Montenegro* joined ACER's Electricity Working Group and Gas Working Group in 2018, while *North Macedonia* formalised its participation in ACER's electricity working group through a signed agreement in 2022. Considering the recent energy supply disruptions in Europe stemming from the conflict in Ukraine, the participation of WB6 countries in ACER would not only help diversify the region's energy supply but also contribute to greater energy stability.

Connecting Europe Facility (CEF)

CEF is a key EU funding instrument to promote growth, jobs and competitiveness through targeted infrastructure investment. It plays a crucial role in advancing the European Green Deal and propelling the Union towards its decarbonisation targets for 2030 and 2050. CEF fosters the advancement of efficient, sustainable, and interconnected trans-European networks across transportation, energy, and digital services, addressing critical gaps within Europe's infrastructure backbone. This multifaceted initiative operates within three distinct sectors—Energy, Telecom, and Transport—prioritising the enhancement of synergies among them. Within the framework of the trans-European networks policy, CEF provides grants for projects of common interest in the energy, transport, and telecommunications domains, facilitating infrastructure development, construction, and upgrades. Moreover, it provides financial backing to initiatives via innovative instruments like guarantees and project bonds, magnifying the utilisation of EU funds and stimulating additional investments from both private and public sectors. Although Article 5 of the *CEF Regulation* allows the participation of candidates and potential candidates, currently, *Serbia* stands as the sole participant in the program, having joined in 2017 with the initiation of the Djerdap navigation lock reconstruction project, with current projects focusing on waterway infrastructure. Given Serbia's substantial benefits, it underscores the potential advantages for other WB nations considering participation in the program.

Going Forward

While the New Growth Plan presents a series of incentives aimed at fostering closer ties between the Western Balkans and the EU, a critical analysis reveals that many of these proposed initiatives were already accessible to the WB6 before the Plan's introduction, rendering this segment of the proposal less revolutionary than presented. Had the proposal been accompanied by a plan to allow for gradual access to EU institutions such as the Council of the EU, European Council, and the European Parliament, that would have been a more effective tool to foster socialisation, build-up of domestic capacities and exchange of views on matters of mutual importance. While it is encouraging that there are ongoing talks between EU and Western Balkan officials on deepening the ties, any attempt to equate participation in agencies and programmes with the notion of gradual institutional participation without opening up the doors of the main EU institutions is unlikely to have a transformative and incentivising effect.

Another problem with the Growth Plan lies in the observation that participation in some initiatives lacks a merit-based approach as they neither necessitate rule of law reforms nor include a reversibility option. This dilutes the EU's power of conditionality over the WB6 to push for extensive reforms during the pre-accession period. Recognising the potential value that initiatives like SEPA can bring to citizens, it becomes evident that their incentive potential will gain in importance only if they are accompanied by effective implementation of the pivotal element of the Growth Plan — the allocation of two billion Euros in grants and four billion Euros in loans upon the successful realisation of substantial reforms. Therefore, focusing on swiftly developing and effectively implementing the upcoming Reform Agendas – i.e. a plan of priority reforms to serve as preconditions to unlock the proposed benefits – remains essential for the success of the Growth Plan and for enlargement in general.



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