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Assessing the 2025 Enlargement Package

Glass Half Full?

Introduction

Annual country reports published by the European Commission (EC) serve as a reflection of the success and general state of play of candidates and potential candidates for EU membership. This year, expectations and interest were high in the Western Balkans, at least in some of the countries. With the EC's 2025 Enlargement Package freshly released, this year's webinar *Enlargement Package 2025: Brussels Meets the Western Balkans*, organised by the European Policy Centre (CEP), gave a clear outline of where the Western Balkans stand on their path toward the EU. The main message is unmistakable: the region is progressing, but at very different speeds.

The discussion opened with insights from Giulio Venneri, Deputy Head of Unit for Enlargement Strategy and Coordination at the European Commission's DG ENEST, who helped frame the Brussels perspective on this year's assessments. The webinar also featured contri-

butions from Miodrag Milosavljević, Deputy Director at the Open Society Foundations – Western Balkans, that added a civil-society and governance perspective from Belgrade. As in previous years, the webinar also incorporated insights from Western Balkan partners within the Think for Europe Network (TEN).

What emerges from this year's discussions is a region no longer moving as one but spread across three very different tracks: Montenegro and Albania as frontrunners, North Macedonia, Bosnia and Herzegovina, and Kosovo stuck in stagnation, and Serbia showing signs of democratic backsliding. Such gaps shape not only how the EU judges the process, but also how the Western Balkan region sees its own future. And in this year's packages, two countries emerged as clear exceptions: Albania and Montenegro managed to turn political will into visible movement.



I. Leading the Way: Montenegro and Albania

Montenegro and Albania emerged as the two clear front-runners in this year's Enlargement Package while webinar participants confirmed the Commission's findings. These two countries demonstrated how sustained political commitment and administrative consistency can translate into measurable progress. Their trajectories were repeatedly emphasised as proof that momentum is possible, even in a region where progress remains uneven and frequently slowed by persistent obstacles.

I. 1 Montenegro

Montenegro's performance shows that long-term consistency and steady reform efforts can position a country at the front of the accession process. The 2025 report was described as very encouraging. Montenegro performs best in Cluster 6 (External Relations) and Cluster 1 (Fundamentals). The cumulative impact of reforms is visible through a stronger track record in tackling high-level corruption and organised crime. These improvements are a strong indicator that Montenegro is committed to meeting EU expectations by actively positioning itself to become the EU's 28th Member State.

This year's recommendations were more concrete. The Commission issued three new recommendations on public procurement, despite the chapter being provisionally closed, mainly due to corruption concerns. Fundamental rights recommendations were sharper as well, especially on corruption-prevention structures and basic working conditions. After signaling that some rule of law issues remain unresolved, the EC also called for transparent electoral reform and stronger safeguards against political influence over the judiciary in the fundamental areas covered by Chapters 23 and 24. Overall, recommendations are within reach for Montenegro, only if political actors stop delaying important legal changes and start addressing structural weaknesses that the EC has now highlighted more explicitly than in previous years.

Still, Montenegro faces structural gaps that limit the sustainability of its progress. Public administration reform remains incomplete: the EC notes that most of the Public Administration Reform recommendations are still unfulfilled, especially concerning merit-based recruitment and professionalisation of the civil service. The government also slowed long-planned public administration reforms by softening major amendments to the civil service law before adoption. Moreover, the EC report highlights gaps in the justice and security sectors, with courts being under-staffed and with few

resources, and the Special Police Unit still lacking sufficient personnel to support corruption and organised crime cases. Overall, Montenegro's progress is real but not yet consolidated. However, its trajectory proves that consistent reforms create credibility, which is why the 2028 accession target is increasingly seen as realistic.

I.2 Albania

Where Montenegro shows the value of consistency, Albania offers a more **dynamic frontrunner** narrative, driven by political momentum and broad alignment, yet marked by uneven reforms and domestic vulnerabilities. After focusing almost exclusively on Cluster 1

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last year, Albania opened its final cluster in November 2025, a symbolic step forward. The Commission reported improvements in six chapters, up from four last year, mainly in Clusters 2, 3 and 4. Albania's preparedness score rose to 2.89, and 22 of 33 chapters are now at least moderately prepared. However, five chapters slowed down, including consumer protection and digital transformation. Albania performs best in Clusters 6 and 3, when others are lagging behind.

Despite notable progress and strong political momentum that Albania wisely used in the past 12 months, some deeper concerns were raised as part of the webinar discussion. Albania's direction remains uncertain, and much of its recent progress comes from easier reforms rather than meaningful structural shifts. When meeting EU standards requires confronting deep-rooted interests, such as reforming the media system, for example, decision-makers often choose not to act. Additionally, civic actors remain excluded, parliament is seen as ineffective, and reform urgency frequently overtakes reform quality, which creates a risk of superficial alignment rather than genuine change. Albania's momentum is real but fragile. To maintain the credibility of a 2030 accession narrative, deeper and more inclusive reforms will be necessary, with stronger democratic oversight mechanisms.

II. Stagnation in Progress: North Macedonia, Bosnia and Herzegovina, and Kosovo

North Macedonia, Bosnia and Herzegovina, and Kosovo all experienced stagnation during this reporting period. North Macedonia has experienced no overall advancement in its EU accession, with its preparedness remaining largely unchanged since being rated moderately prepared in 2011. While North Macedonia continues to maintain its good level of preparation in the chapter on food safety, a traditionally difficult chapter to manage, the country has made little progress within the Fundamentals Cluster, particularly in the key areas of the judiciary and anti-corruption.

Further, North Macedonia did not make progress in the constitutional changes required by the EU to advance accession. The only significant change in North Macedonia's overall progress was its accession to the Single Euro Payments Area in March 2025, which improved the free movement of capital. Therefore, despite some positive developments, North Macedonia must address fundamental issues and constitutional requirements to gain momentum in the accession process.

The situation is similar for Bosnia and Herzegovina, where internal political changes and slowness to adopt the Reform Agenda resulted in minimal changes. Bosnia only had limited progress in the crucial areas of the rule of law, public administration reform, and fundamental rights. Bosnia and Herzegovina remains politically divided and institutionally weak and faced significant domestic political challenges in 2025, damaging its credibility as a candidate country and delaying the opening of negotiations. While visiting Bosnia, Enlargement Commissioner Kos sent a clear message regarding stagnation and encouraged the country to adopt the Reform Agenda. However, Bosnia still must overcome its political paralysis to take decisive steps toward EU membership.

Kosovo, while not yet an official candidate country, also faces an ongoing domestic political crisis and has experienced stagnation and limited progress. As such, it was under a caretaker government for over half of the period and also faced EU-imposed measures, which affected participation in several EU mechanisms. Progress in some chapters was marginal, and Kosovo continues to struggle in the areas of media freedom and public administration reform, and has not advanced normalisation with Serbia. The report notes that Kosovo focused narrowly on elections rather than governance this year, which limited its capacity to ratify the reform agenda.

III. Backsliding in Fundamentals: Serbia

While this year's report indicates that Serbia has made slight overall progress, the Commission reported backsliding within a subsection of Chapter 23 within the Fundamentals Cluster, one of the most crucial areas. Over the past decade, Serbia's overall preparedness has changed only incrementally, consistently **remaining at a moderately prepared level**. Accordingly, Serbia did not undergo any transformative changes this year, as it delayed and failed to fulfill many of the Reform Agenda steps. This was the most critical report to date, discussing protests, police repression, attacks on the media and civil society, and offering an overall critique of democracy and governance in Serbia. This translated into backsliding within the Fundamentals Cluster, especially in the sub-area on freedom of expression in Chapter 23, recognising the increasingly difficult environment for journalists and media professionals. While other candidates are racing to receive as high an assessment as possible of progress, Serbia allowed itself to essentially backslide. In such a scenario, not only will Serbia not be able to catch up with Montenegro and Albania, but it will move further away from the EU.

The report's assessment of Serbia raises questions about the role of reform steps in evaluation and the potential for other areas of backsliding that the Com-

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mission did not identify. The report did not offer clarity on how the implementation – or non-implementation – of reform steps affects assessments. For example, the anti-corruption area is still evaluated as having limited progress, despite the negative depiction of the situation throughout the report and the non-implementation of reform measures in this area. Despite criticism in the report, most evaluations of Serbia's progress remain unchanged. The education and culture chapters stay provisionally closed with a good level of preparedness, despite higher education challenges linked to protests and the government's response. With these questions unanswered, Serbia's path to the EU remains unclear.

IV. Putting it Together: A Shift in Accession Momentum – but not for everyone

Amid ongoing geopolitical developments, the stakes for enlargement policy were particularly high in 2025. The report underscored political commitment as a key differentiating factor among candidate countries, clearly identifying those advancing more decisively – notably Montenegro and Albania. Another positive feature is the clear articulation of timelines, with the European Commission recognising both the importance of credible timeframes and the practical relevance of the dates for reform completion proposed by Montenegro and Albania. Collectively, these shifts are essential to sustaining accession momentum in the region. Nonetheless, concerns remain about the risk of dividing the region into frontrunners and lagging candidates. With Serbia and Kosovo entrenched in a prolonged impasse, Bosnia and Herzegovina unable to resolve internal structural challenges, and North Macedonia constrained by unresolved bilateral disputes with a neighbouring member state, regional co-operation remains fragile. As the enlargement process moves into 2026, its credibility will depend on maintaining momentum without allowing any candidate country to drift to the margins of EU engagement.



About European Policy Centre – CEP

European Policy Centre (CEP) is a nongovernmental, non-profit, independent think tank based in Belgrade. It was founded by a group of professionals in the areas of EU law, EU affairs, economics, and public administration reform, with a shared vision of improving the policymaking environment in Serbia by rendering it more evidence-based, more open and inclusive, and more strongly EU accession-driven. Profound understanding of EU policies and the accession process, the workings of the Serbian administration, as well as strong social capital, combine to create a think tank capable not only of producing high-quality research products but also of penetrating the decision-making arena to create tangible impact. Today, CEP organises its work into four programme areas:

- 1) Good Governance
- 2) Internal Market and Competitiveness
- 3) Regional Policy, Energy and Environment
- 4) Our Europe

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