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**2025 Communication on EU enlargement policy**

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## 2025 COMMUNICATION ON EU ENLARGEMENT POLICY

### I. INTRODUCTION

**Geopolitical challenges have strengthened Europe's unity of purpose.** They have reinforced the conviction across the continent that Europeans need to do a lot more to protect our own security and our prosperity. This also means defending European democratic values and addressing new global security challenges. This can only be done successfully by working hand in hand with our neighbours to create a strong, stable, secure and united Europe based on common democratic values. In today's world, enlargement policy is a key geopolitical tool that contributes to our joint safety, prosperity and security. In an era marked by transformative global shifts, enlargement unifies Europe, based on shared values and identity, while embodying an economic, social and democratic model that continues to inspire and attract.

The enlargement process remains **strict, fair and merit-based**, based on the objective progress achieved by each enlargement country. The renewed impetus for enlargement comes with high expectations on reforms. Candidate countries need to deliver demanding and lasting reforms, ensuring a permanent transformation of their economies, institutions, democratic systems and societies to fully adjust to the democratic standards and values of the European Union. This needs to be underpinned by compliance with the rule of law and fundamental rights and clear adherence to the EU's geopolitical orientation. This requires the leadership of enlargement countries to embrace transformational change, build trust, and foster cross-societal consensus.

At the same time, the EU needs to help enlargement countries meet all the criteria for membership. It has therefore been supporting the strengthening of institutions, democratic governance and public administration reforms. It also stepped up **gradual integration**, by creating stronger connections between the EU and candidate countries and potential candidates, including through the Growth Plans<sup>1</sup> and by granting them participation in certain policies and programme before EU membership. This calls also to condition the advantages of gradual integration to the pace of reforms, such as upholding the rule of law, fundamental rights, democracy and the fundamentals of the accession process more broadly, while also tying it to alignment with the common foreign and security policy (CFSP).

There have been some **significant advances over the past year**. The progress on the EU path achieved so far by the countries with the fastest pace shows that reforms pay off. This should serve as a strong motivation for all countries engaged in the process.

**Each enlargement has made our Union stronger.** This success relies on readiness. While future Member States must prepare for the responsibilities of membership, the EU must also adapt to welcome a larger family. Outreach and communication efforts in both Member States and enlargement countries are being stepped up, to discuss

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<sup>1</sup> Growth Plans for the Western Balkans and Moldova and the Ukraine Facility

benefits and challenges of enlargement with citizens.

## II. GETTING CLOSER TO A LARGER UNION

This is the first Commission mandate since 2010-2014 where, given the accelerating pace of the process for some candidate countries, enlargement is a realistic possibility. Montenegro and Albania already declared their **ambition to close accession negotiations** by 2026 and 2027 respectively. Serbia, Moldova and Ukraine recently also declared their target dates for closing accession negotiations too. This demonstrates their ambition, and the Commission is committed to supporting the countries in meeting the requirements of EU membership, within an accession process that remains based on the own-merits principle.

The EU needs to be ready as well. Therefore, the Commission is working on **pre-enlargement policy reviews and reforms**, which assess the impact of enlargement on key policy areas.

In the proposal for the next **multiannual financial framework** (2028-2034)<sup>2</sup>, the Commission confirms enlargement as a political and geostrategic imperative. The proposal also states that the EU is deeply committed to working with candidate countries and potential candidates to prepare for accession, in full respect of the merit-based process and with the firm conviction that their future lies in the European Union. The new Global Europe Instrument will provide essential financial and policy-based support to help candidate countries and potential candidates to progress along this path.

The EU revised its enlargement methodology in 2020, putting the fundamentals and values of the EU firmly at the heart of the accession process. It delivers results when candidate countries progress with EU-related reforms and maintain their focus on the fundamentals of the accession process and when Member States, in response, take the necessary decisions to move the negotiations forward. For the period after accession, in addition to the existing EU *acquis*, **Accession Treaties** provide an instrument to ensure that this positive dynamic is maintained. Future Accession Treaties will need to contain stronger safeguards against backsliding on commitments taken in the accession negotiations, as well as requirements for the new Member States to continue to safeguard and make irreversible their track-record on rule of law.

## III. ENLARGEMENT COUNTRIES ON THE WAY TO THE EU

### III.1. OVERVIEW OF KEY DEVELOPMENTS

The enlargement process is now moving faster than in the last 15 years. Since the beginning of 2024, eleven inter-governmental conferences have taken place, five with Albania, four with Montenegro and one each with Ukraine and Moldova.

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<sup>2</sup> COM (2025) 570 final

The continued political commitment of the Montenegrin authorities to the strategic goal of European integration has produced tangible results in accomplishing required reforms and moving the country forward on its EU accession path. **Montenegro** has opened all 33 screened negotiating chapters, and seven chapters are provisionally closed. Since the last report, two inter-governmental conferences have taken place, closing provisionally four new chapters<sup>3</sup>, as Montenegro met the closing benchmarks. This is making Montenegro the most advanced in the EU accession process. Staying firm on EU strategic orientation remains key for further progress.

Following the inter-governmental conference on 15 October 2024 that opened accession negotiations on cluster 1 – fundamentals, accession negotiations with **Albania** reached an unprecedented momentum with further four inter-governmental conferences leading to the opening of negotiations on five clusters. This clearly reflects the firm political commitment of Albania. Albania continued to make progress in reforms under the fundamentals cluster, in particular on the comprehensive justice reform and with the completion of the vetting process in first instance, further good results by the Special Structure against Corruption and Organized Crime (SPAK) in anti-corruption cases, active international cooperation against organised crime and capacity development for financial investigations. Key legislation on national minorities and on personal data protection was adopted. The ongoing momentum in the accession negotiation process needs to lead to a further acceleration of EU-related reforms, especially on media freedom, continued implementation of judicial reforms, further results on the fight against organised crime, illicit drug production and trafficking, and corruption, in particular at high level. Further, the promotion of fundamental rights including gender equality and non-discrimination, children's rights, and right to property, supported by inclusive and constructive political dialogue, remain important.

The technical examination of the *acquis* (screening) with **Ukraine** and **Moldova** was completed this autumn. The Commission presented to the Council the screening reports for both countries on clusters 1 – fundamentals, 2 – internal market, 3 – competitiveness and inclusive growth and 6 – external relations. In May 2025, Ukraine and Moldova adopted roadmaps on the rule of law, public administration and the functioning of democratic institutions, and in the case of Ukraine, an action plan on national minorities, in line with the guidance of the screening reports. Maintaining a firm commitment to implementing anti-corruption measures in the area of rule of law, including the fight against corruption, is essential. The Commission recalls its assessment that the fundamentals, internal market and external relations clusters are ready to be opened.

Amid the challenges caused by Russia's war of aggression, **Ukraine** has demonstrated its strong commitment to its EU path, moving forward on key reforms, while further and steady progress is needed in the fight against corruption. The Ukraine Plan has been central in steering reforms and promoting alignment with the EU *acquis*, showing the resilience of conditionality under exceptional circumstances.

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<sup>3</sup> Chapters 5 (public procurement), 7 (intellectual property law), 10 (information society and media) and 20 (enterprise and industrial policy).

Steps already taken (from reinforcing anti-corruption measures to improving public administration) are laying the foundations for recovery and opening space for greater private sector involvement. Sustaining this momentum and preventing any risk of backsliding, in particular on anti-corruption, will be essential. Significant progress was also made on gradual integration into the single market, already bringing Ukraine closer to the EU. On 1 January 2026, the first internal market treatment decision for Ukraine, on 'Roam like at home' will enter into force.

**Moldova** has progressed on its accession path with accelerated speed and significantly deepened its cooperation with the EU despite the continuous hybrid threats and attempts to destabilise the country and its EU course. The firm commitment of Moldova to its EU accession has also been reconfirmed through the 28 September 2025 parliamentary elections, which resulted in a majority firmly committed to advancing the country's EU path. The first EU-Moldova Summit on 4 July 2025 opened a new level of cooperation and integration. In parallel, tangible steps have been taken to gradually integrate Moldova in key parts of the single market, including in the 'Roam like at home' area on 1 January 2026.

**Serbia** has opened 22 out of 35 negotiating chapters, two of which are provisionally closed. The last cluster opened was cluster 4, green agenda and sustainable connectivity in December 2021. The authorities continued to declare EU membership as their strategic goal, but the actual pace of implementation of reforms has slowed down significantly. Serbia needs to deliver on credible reforms across the board, most importantly in the area of the fundamentals of the accession process as well as in accelerating *acquis* alignment, including progressive and stronger alignment with the CFSP. Serbia also needs to take much more responsibility for proactive and more objective communication on Serbia's EU accession process and needs to avoid anti EU rhetoric. The polarisation in Serbian society has deepened against the background of mass students' and citizens' protests taking place across Serbia since November 2024, reflecting disappointment of citizens over corruption and the perceived lack of accountability and transparency, coupled with instances of excessive use of force against protestors and pressure on civil society.

Under the EU-facilitated Dialogue, both Serbia and Kosovo are expected to implement all of their respective obligations stemming from the Agreement on the Path to Normalisation and its Implementation Annex, as well as all past Dialogue agreements. The EU-facilitated Dialogue aims to promote cooperation, achieve progress on the path to the EU and improve the lives of the people.

**North Macedonia** has not yet adopted the necessary constitutional changes with a view to including in the Constitution citizens who live within the borders of the state and who are part of other people, such as Bulgarians, referred to in the Council Conclusions of July 2022, which the country committed to launch and achieve. The authorities continued to work on the roadmaps on the rule of law, public administration reform and the functioning of democratic institutions, and the action plan on the protection of minorities. North Macedonia should intensify efforts to uphold the rule of law, in particular, by safeguarding judicial independence and integrity, and stepping up the fight against corruption.

**Bosnia and Herzegovina** faced political tensions with the end of the ruling coalition and a stalemate in reforms in the reporting period. The Parliament adopted laws on data protection and border control, and the Frontex status agreement was signed. In September 2025, Bosnia and Herzegovina submitted its Reform Agenda to the Commission for agreement. The *Republika Srpska* entity adopted laws undermining the constitutional and legal order and the functionality of state institutions. These laws were repealed by the Constitutional Court. Following a criminal conviction confirmed in appeal, the *Republika Srpska* entity president was removed from office and early elections are scheduled for 23 November. In October, the *Republika Srpska* National Assembly appointed an acting president until the elections, terminated the mandate of the incumbent president and annulled six of the laws previously ruled unconstitutional, aiming at de-escalation of the political situation. The country needs to take relevant steps to hold the first inter-governmental conference, starting with the adoption of judicial reform laws and appointment of a Chief Negotiator. Bosnia and Herzegovina is expected to urgently finalise the pending constitutional and electoral reforms. Reform of State institutions to ensure functionality and non-discrimination will need to take place in the context of the upcoming accession negotiations.

**Kosovo\*** remained committed to its European path, with a high level of public support. However, progress on the EU agenda was hampered by divisive domestic politics and stalled by the Assembly slowing down its activities in the run-up to the February parliamentary elections and by the protracted political deadlock afterwards. The Commission has taken the first steps to gradually lift the measures in place in May 2025. The next steps remain conditional on sustained de-escalation in the north. The Commission intends to further lift these measures provided an orderly transfer of local governance in the north is achieved following the local elections and de-escalation is sustained.

Under the EU-facilitated Dialogue, both Kosovo and Serbia are expected to implement all of their respective obligations stemming from the Agreement on the Path to Normalisation and its Implementation Annex, as well as all past Dialogue agreements. The EU-facilitated Dialogue aims to promote cooperation, achieve progress on the path to the EU and improve the lives of the people. Kosovo is expected to engage in finding long-term solutions for the access to basic public services for all communities, also in accordance with its Dialogue obligations.

**Türkiye** is a candidate country and a key partner for the EU. In line with the European Council conclusions of April 2024<sup>4</sup>, the EU has continued to advance EU-Türkiye relations in a phased, proportionate and reversible manner. As reiterated by the Council in December 2024<sup>5</sup>, the EU has a strategic interest in a stable and secure environment in the Eastern Mediterranean and in the development of a cooperative and mutually beneficial relationship with Türkiye. The EU attaches particular importance to resumption of and progress in the Cyprus settlement talks in further

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\* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

<sup>4</sup> EUCO 12/24

<sup>5</sup> <https://data.consilium.europa.eu/doc/document/ST-16983-2024-INIT/en/pdf>

enhancing EU-Türkiye cooperation. Türkiye is expected to respect international law, good neighbourly relations and the sovereignty of EU Member States. The EU and Türkiye engaged on issues of joint interest, including the implementation of the Customs Union, economic issues, migration management, the green and digital transitions, climate change, foreign and security policy with a focus on regional developments, and connectivity, including within the framework of the cross-regional security and connectivity Ministerial held in October 2025. The EU has a strategic interest in developing resilient and efficient transport, energy and digital connections linking Central Asia to the Southern Caucasus and onwards to the EU. Over the last year, high-level dialogues were held on the economy, trade, migration and security and climate, in line with the relevant Council conclusions. At the same time, the continued deterioration of democratic standards, the rule of law, the independence of the judiciary and respect for fundamental rights remains a matter of considerable concern. There has been a high number of legal actions, arrests and charges brought against elected officials, opposition figures and parties, political activists, civil society and business representatives, journalists and others since the beginning of 2025, which has given rise to questions about Türkiye's adherence to democratic values. Dialogue on the rule of law is an integral part of the EU-Türkiye relationship, and engagement to address these worrying developments will continue.

On **Georgia**, in June and October 2024, the European Council<sup>6</sup> concluded that the Georgian authorities' course of action jeopardised the country's European path, and *de facto* halted the accession process. In December 2024, the European Council regretted the Georgian government's decision to suspend the country's EU accession process until 2028. Since then, the situation has significantly further deteriorated. Georgia has experienced serious democratic backsliding, with a rapid erosion of the rule of law and fundamental rights being severely restricted. The systemic and systematic repressive actions of the authorities, including legislation curtailing civic space and fundamental rights, the functioning of independent media and targeting LGBTIQ persons, excessive use of force in full impunity by the law enforcement authorities and hostile rhetoric against the EU, are in stark contrast with EU values and the actions expected from an EU candidate country. Moreover, there has been a significant backsliding across the nine steps set out in the Commission's recommendation for candidate status, moving the country further away from its EU path. Institutions designed to uphold the rule of law have been instrumentalised for partisan objectives, thereby eroding their integrity. No steps have been taken by the authorities to reverse the course of action and bring the country back on its EU path. The imprisonment of leading opposition figures, coupled with the ruling party's announcement of its intention to ban certain opposition parties and associated individuals, constitutes a direct attack against democratic pluralism.

**Albania, Montenegro, North Macedonia and Bosnia and Herzegovina** maintained full alignment with the **EU common foreign and security policy**. The implementation of sanctions in Bosnia and Herzegovina remains a challenge and the country is expected to continue strengthening its capacity to implement and enforce restrictive measures. Kosovo has maintained its voluntary alignment with the CFSP and

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<sup>6</sup> EUCO 15/24; EUCO 25/24

implementation of EU restrictive measures, signalling its clear commitment to EU values, which the EU has repeatedly welcomed. To report on Kosovo's convergence with the CFSP under the EU-Kosovo Stabilisation and Association Agreement, the Commission will introduce a dedicated Chapter 31 from next year. The overall alignment rate of Ukraine and Moldova remained very high.

**Serbia**'s rate of alignment with the CFSP remains low. Serbia continued to cooperate with the EU on sanctions circumvention but needs to improve its rate of alignment significantly to advance on its EU path. The fast-track acquisition of visa-free travel rights to the EU for nationals of Russia by granting them Serbian citizenship poses potential security risks for the EU. **Georgia**'s alignment rate with the CFSP decreased and remains low. The re-export of common high priority and economically critical goods is still of concern. Flights from Georgia to various destinations in Russia continued to significantly increase. Georgia should step up cooperation efforts to prevent that its territory and/or legal entities registered in Georgia are used to circumvent EU restrictive measures. **Türkiye** made no progress on CFSP alignment, maintaining a very low rate during the reporting period. Türkiye engages with the EU to stop the circumvention of EU sanctions against Russia, delivering some results, and is encouraged to continue and step-up this cooperation. Those candidate countries that are not already doing so are expected, as a matter of priority, to fulfil their commitment and improve their alignment with the CFSP, including restrictive measures, in line with their negotiating frameworks, and to avoid actions and statements that go against EU positions on foreign policy.

### **III.2. THE FUNDAMENTALS OF THE ACCESSION PROCESS**

The **rule of law, fundamental rights, the functioning of democratic institutions, public administration reform and the economic criteria** constitute the 'fundamentals' of the EU accession process, reflecting EU values and principles. Credible reforms and irreversible achievements on the fundamentals are essential for people to enjoy equality before and by the law and for them to be able to enjoy their fundamental rights in practice. Consolidating results in these areas is crucial for enlargement countries to secure progress along their respective paths to accession. Rule of law and good governance provide legal certainty and are also the basis for boosting competitiveness and creating the conditions for foreign direct investments, socio-economic progress and prosperity. Furthermore, stable institutions are essential for compliance with the EU *acquis* across all policy areas, including the management of the substantial financial assistance the EU provides. It remains important to ensure that enlargement countries collect reliable official statistics.

Over the past year, progress on the reforms linked to the fundamentals was noted particularly in Montenegro, Albania, Moldova and Ukraine. In sharp contrast, in Georgia the fundamentals drastically eroded.

In 2025, as in 2024, four candidate countries – Albania, North Macedonia, Montenegro and Serbia – are covered by the Rule of Law Report<sup>7</sup> alongside EU Member States. This is also an element of gradual integration aiming at firmly and irreversibly anchoring democracy and the rule of law in enlargement countries ahead of and after their accession. The exercise is complementary to the enlargement reports which comprehensively cover all aspects of the functioning of democratic institutions, rule of law and fundamental rights as well as all the chapters of the EU *acquis*.

### **The functioning of democratic institutions**

Stable and consolidated **democratic institutions**, remain central to the accession process and are vital to political stability. In several enlargement countries, issues related to polarisation, limited parliamentary oversight, and weak implementation of public consultation frameworks continued to hamper democratic processes. In Georgia, the state of democracy deteriorated significantly, with institutions and bodies essential to the proper functioning of democracy lacking impartiality and independence. The electoral processes in a number of countries were overall peaceful, competitive and conducted professionally. However, significant reforms are needed in several countries to address outstanding recommendations from the Organization for Security and Co-operation in Europe / Office for Democratic Institutions and Human Rights and the Venice Commission, in particular to improve public confidence in electoral processes. In Georgia, the October 2024 parliamentary and October 2025 local elections were marked by a high level of polarisation and democratic backsliding, with reports of intimidation, coercion, and pressure on voters, raising concerns about the people's ability to freely form opinions and cast votes without fear of retribution. Moldova amended its legal framework to tackle threats of foreign interference in elections and electoral corruption; it remains important to work further to finalise the alignment of the legislation pertaining to election with European standards.

While many countries have legal frameworks that provide an enabling environment for **civil society**, challenges in implementation led to persistent issues, particularly those related to limited funding from national authorities and meaningful consultations. Additionally, the introduction of restrictive laws in certain countries, and the use of strategic lawsuits against public participation (SLAPPs) raise serious concerns about shrinking civic space. In Georgia, the adopted and enforced restrictive laws targeting activists, civil society and independent media threaten the survival of democratic foundations and are unprecedented among candidate countries. Similarly, arrests and other coercive measures applied in the context of demonstrations in Georgia, but also in Serbia have a chilling effect on civil society, aggravated by verbal attacks and smear campaigns including by high-level officials. In Türkiye, civic space has further shrunk due to sustained judicial and administrative pressures from the authorities. Nevertheless, in some countries, there have also been encouraging developments, including the activation of the Council for Cooperation between the Government and Civil Society in North Macedonia and the

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<sup>7</sup> COM(2025) 900 final

adoption of three laws to strengthen the engagement and consultation of citizen and civil society organisations in Ukraine.

### **Public administration reform**

Overall progress in implementing the recommendations on **public administration reforms** is limited. Whilst the candidate countries demonstrate readiness to adopt the necessary strategic frameworks and policy planning tools, implementation lags behind. Underlying factors include the lack of administrative capacity, the need for changes in administrative culture to sustain reform in the long-term, as well as insufficient political ownership. Politicisation of the civil service remains a crucial challenge as regards human resources management. Progress is needed to ensure a culture of accountability, as key institutions such as national parliaments or supreme audit offices are not being used to their full potential in exercising control on governments on matters of public administration.

All countries have established a credible and relevant strategic framework for **public finance management**. Progress remains rather limited to key aspects such as the setting up of independent fiscal councils and systems to monitor fiscal discipline and tax revenues, public investment management and the linking of strategic planning to medium-term budgetary frameworks.

### **Judiciary and fundamental rights**

Most of the enlargement countries have continued to invest in the functioning of their **judiciary** by implementing sectoral reforms. However, the impact of these reforms presents a mixed picture. Independence and accountability continued to be strengthened, including through vetting processes, in Albania, Ukraine, Moldova and improved merit-based and transparent nomination and functioning of management bodies in these countries. In Montenegro, after an intensive phase of reforms in 2024, the implementation of the improved legal framework guaranteeing the independence, impartiality and accountability of the judiciary has yielded some initial positive results. In parallel, undue influence and attempts to curtail the independence of the judiciary have undermined the rule of law and democracy in Türkiye and to a certain extent in Serbia. In Georgia, legal changes severely undermined the independence and integrity of the judiciary, exacerbating risks of judicial capture. In other countries, there has been limited progress in addressing the key recommendations for the sector (such as in North Macedonia, Bosnia and Herzegovina, Kosovo). Across all countries, meeting European standards requires a sustained reform effort, an increase in capacities of management bodies and the allocation of appropriate human, technical and financial resources.

**Corruption** continues to pose a significant challenge which the enlargement countries need to tackle as a matter of priority. Further steps have been taken to reinforce legal and institutional frameworks to prevent and fight corruption in Albania, and Moldova while in Montenegro improvements adopted last year are being consolidated. Legislative amendments in Ukraine risked weakening specialised anti-corruption institutions but were swiftly reversed. Any action that weakens or reverses strong anti-corruption reforms must be avoided. Various risks of state capture, notably in Bosnia and Herzegovina, Georgia, Serbia and Türkiye

must be addressed. High-level corruption, organised crime, tax fraud and the disproportionate influence of vested interests over the political, economic, and public spheres, require resolute action to ensure the rule of law and economic development in the enlargement countries. Political will, a commitment to improving transparency and integrity, including effective systems for asset declarations and detecting and mitigating of conflicts of interest are essential. A holistic approach is needed, which includes the consistent implementation of anti-corruption strategies and ensuring that the anti-corruption bodies are effective, independent and adequately resourced. While a track record is gradually being strengthened, notably in Albania, Kosovo, Montenegro, Moldova and Ukraine, further efforts to investigate and prosecute corruption, especially at higher levels, need to continue and intensify in all enlargement countries. Further efforts are also needed in creating and safeguarding an enabling environment for investigative journalism and civil society.

The legal frameworks for the respect, protection and fulfilment of **fundamental rights** are generally in place and alignment with the EU *acquis* has progressed in most enlargement countries. Alignment gaps, however, still persist, in particular on data protection, procedural and victims' rights, media freedom, non-discrimination, hate crime and hate speech, the rights of persons with disabilities including accessibility, gender equality, rights of LGBTIQ persons and gender-based violence. The enforcement of human rights has worsened in some countries and in all cases requires a more systematic follow-up to the recommendations of international and European monitoring bodies, Ombudsperson or national human rights institutions, equality bodies and data protection authorities. These institutions also require additional and sustained resources. Their independence also needs to be strengthened. All countries need to ensure that the judgments of the European Court of Human Rights are enforced. Concerns remain regarding detention conditions and the measures to prevent torture and ill-treatment (in particular in North Macedonia, Ukraine Moldova and Georgia). Restrictions on freedoms of association, assembly and expression have increased in some countries, such as in Serbia, Türkiye and Georgia, in the latter including through the introduction of repressive legislation.

**Freedom of expression**, media freedom and pluralism are key pillars of a democratic society. Some improvements can be noted in Montenegro and North Macedonia. Overall, the media sector in most enlargement countries remains marked by media concentration, and political influence, and is broadly exposed to FIMI (foreign information manipulation and interference) activities. The independence of regulatory bodies and public service broadcasters needs to be guaranteed, with further efforts to strengthen pluralism, independence, the quality of reporting together with working conditions of journalists. Intimidation of journalists, including strategic lawsuits against public participation (SLAPPs), threats, reprisals, physical attacks and detention increased in several countries, leading to backsliding in Serbia, Georgia and Türkiye. A track record of systematic follow-up by law enforcement and judicial authorities must be established.

Sustained efforts are needed to further align with the EU *acquis* and to ensure the effective implementation of equality and **non-discrimination** legislation, to tackle hate crime and hate speech and to address continued discrimination against Roma,

LGBTIQ persons, persons with disabilities and persons belonging to minorities. **Gender-based violence** and domestic violence in particular remains widespread throughout the enlargement countries and efforts are needed to ensure effective availability and capacity of specialised support services for victims. **Child protection** has been strengthened notably in Ukraine, but all countries should continue to prioritise the systematic integration of child protection systems, accelerating deinstitutionalisation of children deprived of parental care as well as **persons with disabilities** (including children).

### **Justice, freedom and security**

Progress continued in the **fight against serious and organised crime** with the aim of stopping criminal groups from enlargement countries from operating domestically and internationally, including within the EU. Efforts to develop a solid track record of investigations, prosecutions and final convictions in all areas of serious and organised crime have led to some progress, showing a continued overall improvement, and should be pursued. Enlargement countries should strengthen their capacities to conduct pro-active investigations based on intelligence, so they can tackle complex cases of organised crime. The capacity of specialised prosecution services to effectively prosecute organised criminal groups improved in some countries, notably Albania, and should be developed further. Cooperation and coordination mechanisms between institutions involved in investigating and prosecuting organised crime also need to be strengthened in several countries, in particular in Bosnia and Herzegovina, Georgia, Moldova and Ukraine, and ongoing reforms in the latter two countries should be pursued.

**Law enforcement and judicial cooperation** between the EU Member States and enlargement countries continued to yield positive results. Cooperation with CEPOL, Europol, Eurojust and the European Public Prosecutor's Office (EPPO) is well established with most enlargement countries. Several new joint investigation teams were set up, leading to successful arrests. Participation in the European Multidisciplinary Platform Against Criminal Threats, while still uneven, has intensified overall and should be further pursued notably in the interest of effective investigation and prosecution of organised crime groups.

**Drugs trafficking** remains one of the most widespread areas of activity of organised criminal groups across enlargement countries. Seized drugs should be more systematically destroyed, with only a sample kept for criminal proceedings. Progress was made in the establishment of national early warning systems on new psychoactive substances in Albania, and Moldova. In line with its revised mandate, stronger cooperation with the European Union Drugs Agency is being developed.

Implementation of the comprehensive regional roadmap on controlling **small arms and light weapons (SALW)** control in the Western Balkans has yielded positive results in many areas and should continue. Likewise, Moldova is making steady progress on SALW control and should continue to address remaining challenges. In Ukraine, good progress was also achieved on SALW control, which should continue to advance..

Enlargement countries will need to increase their efforts to **fight trafficking in human beings** and to further reduce the number of irregular migrants smuggled, in the context of a significant decrease in irregular migratory flows to the EU via the Western Balkans route. Particular attention should be paid to the prevention of trafficking and to providing assistance to victims of trafficking, including avoiding re-trafficking and fostering reintegration. The enlargement countries, especially Serbia, Montenegro, Moldova and Türkiye have taken significant steps to reinforce their antitrafficking policies by further strengthening their legal, institutional or operational framework for combating traffickers and assisting the victims.

As organised crime is increasingly active in the digital space, it is crucial that enlargement countries build stronger capacities to investigate cyber-enabled crimes.

The capacity to fight **economic crime, international tax fraud and money-laundering** needs to be improved. Montenegro, North Macedonia, Albania, Serbia and Moldova made progress on anti-money laundering and countering the financing of terrorism in the past year. All enlargement countries need to establish a solid track record of investigations, prosecutions and final convictions in money-laundering cases, including as a standalone crime. Further alignment with the EU *acquis* on the criminalisation of money-laundering is necessary in this regard, as well as on countering the financing of terrorism and asset recovery. Some countries have made progress in launching financial investigations more systematically. However, overall, the capacity to launch such investigations and effectively seize and confiscate assets is still insufficient. To effectively trace and confiscate illicit financial flows, further efforts are required on collecting and disseminating reliable information, including by improving the transparency of beneficial ownership information i.e. notably through the beneficial ownership registers, and strengthening interinstitutional access to relevant databases. Furthermore, all available confiscation tools should be used. While the setting-up of asset recovery offices remains uneven across the enlargement countries, some progress has been made in particular by Albania and Kosovo. Additional capacities need to be developed to tackle the misuse of crypto-currencies for criminal purposes. Enlargement countries must ensure that their customs authorities have adequate implementation and enforcement capacities and that they cooperate also with their tax authorities.

**Terrorism, violent extremism and radicalisation** continue to require close attention. Implementation of the Joint Action Plan on Counter-Terrorism for the Western Balkans continued, while a new Joint Action Plan was signed in October 2025. The enlargement countries should ensure that their legal frameworks criminalise terrorist offences effectively and are aligned with the EU *acquis* on explosive precursors and terrorist content online. Online radicalisation, notably of young people and minors, and radicalisation in prisons, remain the most concerning and challenging contexts of radicalisation. Greater efforts are needed to prevent these phenomena, and concrete measures should be taken to counter terrorist content online. Coordination mechanisms for preventing and countering terrorism and violent extremism still need to be set up or further developed in many enlargement countries.

Legislative and institutional alignment with the EU framework on the resilience of critical entities remains at an early stage across the board. More efforts are needed

to develop national legislation and identify critical infrastructure in line with EU *acquis*.

**Hybrid threats** remain a serious political, societal and security challenge for enlargement countries. These threats include foreign information manipulation and interference (FIMI), physical and cyber-attacks, in particular on critical infrastructure. They seek to undermine the EU's core democratic values and to fracture societies, both within the EU and in the enlargement countries. Moldova in particular has proved its resilience vis-à-vis Russia's relentless interference in the context of the parliamentary elections. Across the enlargement countries, greater efforts are needed to close the space for FIMI, disinformation and to increase the resilience of society (see also part IV of this communication). The EU's support for and cooperation with candidate countries on improving mutual resilience has been further strengthened.

## Migration

The EU remains firmly committed to cooperating with and supporting the Western Balkans and Türkiye by taking a comprehensive approach to address **irregular migration**, including fighting against migrant smuggling and trafficking in human beings, improving border management, cooperation on asylum, protection and reception, intensifying work on returns while ensuring the protection of fundamental rights and achieving further visa policy alignment. While irregular migratory flows have decreased on the Western Balkan routes, addressing irregular migration along this route requires constant vigilance, in particular the illegal and violent activity of criminal networks involved in migrant smuggling and trafficking in human beings.

In 2024, the number of illegal border crossings into the EU from the Western Balkans decreased by 78% compared with 2023 – a continuation of the 31% decline recorded in 2023 compared to 2022. The very significant downward trend persisted in 2025 so far, with a further 47% decrease in detections during the first eight months of the year, compared to the same period of 2024. This progress is linked to enhanced enforcement efforts within the region and the EU action plan on the Western Balkans. Quicker alignment with the EU *acquis* over recent years also contributed to improved border management. Focus areas include effective border management, the fight against migrant smuggling and trafficking in human beings, increasing returns, and cooperating on asylum and protection, and reception systems.

Overall, the EU's cooperation with the Western Balkans in combatting migrant smuggling and trafficking in human beings is bringing operational results. Western Balkan partners have shown ongoing commitment to cooperate in this area.

During the first half of 2025, arrivals from Türkiye along the Eastern Mediterranean route decreased by more than a third and arrivals decreased along all sub-routes. Similarly, arrivals to Italy departing from Türkiye decreased by 36% compared to the same period in 2024. While the sea routes from Türkiye to Italy and to Cyprus saw a substantial decrease in 2024, irregular arrivals from Türkiye to Greece via the land borders increased substantially. The Commission is implementing the EU action plan for the Eastern Mediterranean route adopted in October 2023. The EU continues to support Türkiye's significant efforts in hosting 2.7 million refugees, mainly from

Syria, and cooperates with the Turkish authorities to prevent irregular migration. Implementation of the March 2016 EU-Turkey statement and the EU-Turkey readmission agreement remains crucial to EU-Türkiye cooperation overall. Russia's war of aggression against Ukraine continues to cause a massive displacement of the population within Ukraine and the wider region. Countries in the wider region, and in particular Moldova, have continued to host Ukrainian refugees, contributing to protection and integration efforts.

Further alignment with the EU **list of visa-required third countries** should be addressed as a matter of priority by all Western Balkans partners, to avoid causing a migratory or security risk to the EU. Pending full alignment, enlargement countries should ensure a rigorous screening of visa-exempt third country nationals. Programmes and practices of granting citizenship by investment to nationals of third countries who are visa required in the EU create security or irregular migration risks, undermining EU visa policy and should therefore discontinue as a matter of priority.

Unfounded asylum applications lodged by nationals of visa-exempt enlargement partners continue to pose a significant challenge for some EU Member States.

Five new status agreements allowing the European Border and Coast Guard Agency (Frontex) to deploy additional European Border and Coast Guard standing corps teams in the Western Balkans have been negotiated, signed, or operationalised since 2022.

Aligning national systems with the **Schengen requirements** has advanced. This is essential for equipping enlargement countries with the necessary tools and resources to address shared challenges, including security threats and irregular migration. Montenegro, Albania and Serbia have progressed in designing or implementing their Schengen Action Plans, while the others are taking preparatory steps. Granting seasonal visa-waivers and allowing visa-free entry on the basis of a visa or residence permit issued by a third country should be discontinued. The most advanced enlargement countries should accelerate their efforts and appoint a national Schengen Coordinator responsible for designing, implementing, and monitoring the Schengen Action Plan.

## **Economy**

Economic growth remained relatively robust in 2024, and inflation came down in most of the ten enlargement economies, supported by lower global commodity prices and an overall cautious monetary stance in countries with monetary autonomy. Lower inflation and rising wages boosted real disposable incomes, and stronger household consumption was generally the main driver of economic growth in the Western Balkans, Moldova and Georgia. Annual GDP growth picked up in Georgia (9.4%), Kosovo (4.4%) and North Macedonia (2.8%), while Serbia (3.9%) and Albania (4%) broadly maintained the same growth rates as one year earlier. GDP growth stagnated in Moldova (0.1%) mainly due to a significant decline in agriculture, while it nearly halved in Montenegro (3.2%) and moderated in Bosnia and Herzegovina (2.6%) mainly due to weaker exports. Ukraine's economy demonstrated resilience (2.9%), but the momentum weakened from the mid-year due to Russia's intensified attacks on critical infrastructure. In Türkiye, tight monetary policies

curtailed domestic demand and rebalanced economic growth (3.3%) towards net exports. Bold policy action turned the tide on inflation, but domestic political tensions triggered a financial turmoil in the spring of 2025.

Current account balances deteriorated in most enlargement economies in 2024, reflecting increased imports driven by strong domestic demand. Net inflows of foreign direct investment fell slightly as a share of GDP, but in most countries they more than covered the external deficit. Lending to the private sector picked up in most countries. The banking sectors have maintained robust capital and favourable liquidity positions, and profitability has increased in most cases due to continuing high interest margins. Asset quality indicators have improved overall.

In 2024, government revenue rose strongly across the Western Balkans and in Moldova. At the same time, expenditure was lower than budgeted in most countries, often reflecting lower than planned capital spending. Budget execution generally resulted in lower-than-expected fiscal deficits. Fiscal challenges stem among other things, from narrow revenue bases, weaknesses in public investment management, gaps in fiscal governance and moderate to high public debt in some cases.

Although most enlargement economies witnessed some labour market improvements, with falling unemployment and rising employment rates in 2024, participation rates remained generally low and unemployment was higher than in the EU, in particular for women and young people. Active labour market policies do not sufficiently target the most vulnerable population groups while undeclared work remains a challenge. Structural skills mismatches persist due to under-investment in human capital and underdeveloped education and training systems. Continued improvement of the quality, relevance and inclusiveness of education through comprehensive reforms and promoting youth participation are necessary to address these challenges. Economic convergence needs to go hand in hand with social convergence, based on the principles of the EU Pillar of Social Rights and the EU social *acquis*. In order to achieve this, it is crucial that all enlargement countries progress on developing well-functioning labour market structures and institutions, effective social protection systems and strong social dialogue.

All ten enlargement countries are faced with the challenge of accelerating structural reforms to enable sustainable growth in the medium term and make progress in meeting the economic criteria for EU membership. This involves ensuring the functioning of market economies and demonstrating the capacity to cope with competitive pressure and market forces in the EU. Economic policies should also support ambitious goals under the green and digital transition. Pursuing decarbonisation and resilience policies is an area that requires urgent attention from enlargement countries. The EU supports the countries' reform efforts through the Growth Plans for the Western Balkans<sup>8</sup> and Moldova<sup>9</sup>, the Ukraine Plan<sup>10</sup> and intense policy dialogue and recommendations jointly agreed in the Economic and Financial

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<sup>8</sup> COM (2023) 691 final

<sup>9</sup> COM (2024) 470 final

<sup>10</sup> Regulation (EU) 2024/792

Dialogue based on, *inter alia*, the Economic Reform Programmes.<sup>11</sup>

### **III.3. ECONOMIC AND SOCIAL CONVERGENCE, COMPETITIVENESS AND GRADUAL INTEGRATION**

Strengthening economic ties between the EU and enlargement countries is key for the socio-economic development and the competitiveness of both the partner countries and the EU. The EU has put in place the framework and instruments to **accelerate economic and social convergence between enlargement the countries and Member States** before enlargement. The investment and the reforms in the Growth Plans for the Western Balkans and Moldova and the Ukraine Facility support and prepare the enlargement countries for membership. These instruments are complemented by the possibility provided in the association agreements and in various sectoral agreements of further **gradual integration of candidate countries** into selected EU policies and into relevant EU flagship initiatives, which will help them implement the EU *acquis*, gradually integrate into parts of the single market and make the transition to being Member States smoother. Systematically reflecting the enlargement dimension in upcoming EU initiatives will further facilitate the accession of future Member States.

*The financial instruments supporting socio-economic convergence*

To strengthen its **support for reforms** in the enlargement countries, the EU is moving towards **results-driven instruments** such as policy-based loans and results-based financing. This puts the focus on achieving concrete outcomes rather than reimbursing costs, making EU financial support more impactful and strategically aligned with key reform priorities.

The **Reform and Growth Facilities for the Western Balkans**<sup>12</sup> and **Moldova**<sup>13</sup>, as well as the **Ukraine Facility**, channel support through structured Reform Plans and Agendas, under which the disbursement of funds is tied to measurable progress on reforms. By rewarding progress and reinforcing accountability, the EU helps partners advance reforms in governance, the economy, and the rule of law, aligning more closely with EU standards and values. These targeted instruments reinforce our shared commitment to sustainable growth, stability, and eventual EU membership. The new reform and growth plans and the fact that the associated Facilities are already being implemented are another **clear demonstration of the EU's resolute support and commitment**, fostering economic convergence before accession. The first periods of implementation have already brought some results in accelerating reforms. The enlargement countries need to sustain the current momentum and double their efforts, to bring in even more concrete benefits to their citizens.

The **Ukraine Facility** is the main instrument of the EU's support to Ukraine. It ties financial support to an ambitious growth-enhancing reform agenda aimed at facilitating structural transformation while supporting Ukraine's accession path

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<sup>11</sup> Due to backsliding on the fundamentals, Georgia has not been invited to the 2025 Economic and Financial Dialogue.

<sup>12</sup> Regulation (EU) 2024/1449

<sup>13</sup> Regulation (EU) 2025/535

towards the EU. The Ukraine Facility is delivering on its objectives to support Ukraine's financing needs and reconstruction, mobilise investments, improve support to Ukrainian society and promote the reforms necessary for EU accession. As of 1 October, the Facility has mobilised EUR 31.3 billion, of which EUR 22.7 billion has been disbursed directly to the State under Pillar I of the Facility, in the form of budget support.

The **Ukraine Plan**, under the first pillar of the Ukraine Facility, sets out the reform and investment strategy for the country from 2024 to 2027, promoting Ukraine's economic recovery, reconstruction and modernisation while simultaneously fostering alignment with the EU *acquis*. The concrete steps set out in the Plan encompass a range of essential measures to bring Ukraine closer to the EU *acquis* in the short-term, including the adoption of legislation which advances implementation of the EU *acquis*, the implementation of EU recommendations, and the adoption of EU standards across various sectors. In light of the challenges posed by Russia's war of aggression, the Ukraine Plan was slightly amended in October 2025 to clarify some steps and modify certain implementation deadlines, while maintaining Ukraine's overall commitments unchanged. As of 28 October 2025, 44 reform steps as envisaged under the Ukraine Plan have been fulfilled, laying the groundwork for Ukraine's long-term recovery, accelerating Ukraine's progress towards accession, and helping to bring Ukraine's institutions in line with EU standards. Eleven of the completed steps also help to align Ukraine with the EU *acquis*. Significant reforms include increased capacity to fight corruption, the improvement of corporate governance standards, economic security, the fight against tax evasion and the adoption of a national energy, and climate plan and climate law, while some steps on reforms, including those related to the judicial system, are still pending.

The **Moldova Growth Plan**, adopted in October 2024, aims at boosting socio-economic convergence with the EU and supporting the accession process, based on the implementation of EU-related reforms. The Plan is built on three pillars which will accelerate socio-economic and fundamental reforms, improve access to the EU single market and increase financial assistance through a dedicated **Reform and Growth Facility for Moldova**. The EU has committed a substantial support package of EUR 1.9 billion for the period 2025-2027 through the Facility that was, adopted in March 2025. The Reform Agenda, which contains 153 reforms, was adopted by Moldova on 7 May, followed by the signing of the Facility Agreement and the Loan Agreement. The implementation of this instrument will support the modernisation of Moldova and its transition into a successful future Member State. Pre-financing amounts to EUR 294 million, of which EUR 270 million in loans that was disbursed on 11 June and EUR 24.3 million in grants that will support investment projects approved under the Neighbourhood Investment Platform at a later stage. The first tranche of loans of EUR 18.9 million was disbursed on 2 September 2025, after Moldova submitted its first reform steps. Together, the Plan and Facility will enable and incentivise the reforms and investments needed to accelerate the accession process and will also promote sustainable growth and decarbonisation of Moldova's economy to the benefit of its people.

The **Growth Plan for the Western Balkans** includes a dedicated **Reform and Growth Facility** of EUR 6 billion, aimed at boosting the beneficiaries' economies socio-economic convergence with the EU and at accelerating regional economic integration and progressive integration into the Single Market. The Facility rewards the Western Balkans for progress in implementing agreed reform agendas and supports key investments in priority areas via the Western Balkans Investment Framework. Sizeable funds have been released under the first two reporting rounds of the Facility, showing that its innovative performance-based approach is delivering results on the ground. However, the beneficiaries need to continue efforts to complete the remaining reform steps in order to fully reap the benefits of this instrument.

In October 2024, the Commission adopted a decision approving five **Reform Agendas**. Implementation of related reforms kicked off in 2025, and part of the pre-financing was disbursed to Albania, Montenegro, North Macedonia and Serbia. In July 2025, the Commission adopted two decisions to release funds to Montenegro and North Macedonia based on the first round of payment conditions fulfilled by March 2025. In October 2025, the Commission authorised a further disbursement of funds to Albania, Montenegro, and North Macedonia under the second round of payment conditions, in recognition of substantial reform progress and the fulfilment of 30 Reform Agenda conditions. Given the initial delay in adopting its Reform Agenda, in July 2025, the Commission had to cut Bosnia and Herzegovina's indicative allocation under the Reform and Growth Facility by 10%. Bosnia and Herzegovina submitted the Reform Agenda in September 2025 for the Commission's agreement. The ratification of the Facility and Loan Agreements by Kosovo remains pending, due to the political deadlock, and the implementation of the agreed steps in Kosovo's Reform Agenda has therefore been limited.

The Facility complements the assistance for the Western Balkans through the **Instrument for Pre-accession Assistance** (IPA III)<sup>14</sup>. The instrument focuses on administrative and institutional capacity building, as well as implementation of the 2020 Economic and Investment Plan for the Western Balkans<sup>15</sup>, the roll out of initiatives under the Global Gateway Strategy<sup>16</sup>, supporting economic growth and promoting the dual green and digital transitions.

The IPA III programming for the period 2025-2027 focuses on a policy-driven approach. This aligns with the Reform and Growth Facility for the Western Balkans, ensuring that the EU's bilateral support is both strategic and impactful. The IPA III multi-country programme is set to drive the implementation of the Western Balkans Growth Plan, reinforcing the EU's commitment to this region. This approach guarantees that all initiatives work in tandem with the efforts of individual countries, thereby maximising the effectiveness and reach of the EU's support.

#### *Gradual integration*

**Accelerated, or gradual, integration** seeks to bring some of the benefits of future EU accession into the pre-accession stage by allowing a candidate country to integrate into specific areas of EU policy, notably parts of the EU Single Market, once legislative alignment and the capacity to implement the EU *acquis* is in place. This provides an incentive for early alignment and implementation of the EU *acquis*. Gradual integration is a clear proof of the EU doing its part by putting forward offers for the partner countries to speed up and deepen integration with the EU, paving the way for enlargement. Gradual integration is not a substitute for enlargement but a tool to support it. Consequently, proceeding with gradual integration requires credible and real commitment from the enlargement countries to proceed on the accession path and make progress in areas of importance to EU's geostrategic objectives, such as upholding rule of law and democracy and also more broadly, CFSP alignment, thus rendering the accession process more dynamic and incremental. Agreements granting internal market access to enlargement countries in the context of their gradual integration will include a robust institutional framework as well as legal safeguards and dispute settlement mechanisms modelled upon the EU treaties that ensure the integrity of the internal market and the consistent application of Union law.

As regards the Western Balkans, advancing the work to which the six partners have committed in the context of the Common Regional Market is a pre-condition for closer integration with the single market, while no Western Balkan partner shall be able to block access to the EU single market for any of the other five.

For Ukraine and Moldova, the Deep and Comprehensive Free Trade Areas have proven to be reliable and flexible legal frameworks and, more importantly, effective instruments for fostering their gradual integration. For the Western Balkans, the 2023 Growth Plan offered a pathway for gradual integration, building on the Stabilisation and Association Agreements.

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<sup>14</sup> Regulation (EU) 2021/1529

<sup>15</sup> COM (2020) 641 final

<sup>16</sup> JOIN/2021/30 final

Moldova, Ukraine and the Western Balkan partners have all benefited from gradual integration, with 2025 being a pivotal year for in several areas. Gradual integration is a driver alignment with the EU *acquis*, with results already visible in the fields of **telecommunications (roaming), payments, banking** and anti-money laundering legislation (Single Euro Payments Area, SEPA), **customs, energy and industrial goods**. Other areas of gradual integration include agriculture, trust services, space, healthcare, transport and defence. Work in all these areas will continue to be developed.

Significant steps have been taken to integrate enlargement partners into the EU's '**Roam like at home**' zone. In 2025 the Council adopted the decisions that will grant mutual roaming access for Ukraine and Moldova as of 1 January 2026. This will bring benefits to people, including displaced Ukrainians, by enabling them to stay connected across borders at no extra cost. The Western Balkans continued implementing the 2019 Regional Roaming Agreement and the voluntary agreement by leading telecom operators to lower data roaming charges with the EU, which entered into force on 1 October 2023. At the same time, the Commission is engaging with the operators and preparing to propose six bilateral agreements to extend the '**Roam like at home**' zone to Western Balkan partners, in order to grant to them comparable benefits and impose comparable obligations as those given to Ukraine and Moldova.

In terms of **payment services**, a major milestone has been the inclusion of Montenegro, Albania, North Macedonia, Moldova, and Serbia in the geographical scope of the Single Euro Payments Area (SEPA) schemes<sup>17</sup>. This allows their financial institutions to partake in SEPA payment schemes, making Euro transfers easier and paving the way for reduced costs and processing times. To join SEPA, countries had to align with key EU financial rules, including on anti-money laundering and countering the financing of terrorism, thus bolstering their financial systems' integrity and security while at the same time advancing their accession process. While Kosovo's application process is ongoing, Bosnia and Herzegovina and Ukraine are working on their application.

**Customs cooperation**, including on customs control and facilitation, is another critical component of gradual integration. With Moldova, a mutual recognition framework for authorised economic operators (AEO) has been in place since 2022. Work on a similar agreement with Ukraine is underway. Progress has been achieved to implement Additional Protocol 5 to the CEFTA Agreement which envisages the mutual recognition of the AEO programmes of the CEFTA parties, laying the basis for a mutual recognition framework with the EU. The Common Transit Convention, another pivotal agreement that speeds up the cross-border movement of goods, has already been joined by North Macedonia, Serbia, Georgia and Ukraine. Moldova and Montenegro have been invited to join the Convention on 1 November 2025, while and Bosnia and Herzegovina and Albania are accelerating their preparations. These

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<sup>17</sup> Albania, Montenegro, North Macedonia, Moldova and Serbia are covered under the geographical scope of SEPA, and individual banks of Albania, Montenegro, North Macedonia and Moldova have joined the payment schemes of SEPA on 6 October 2025. Individual banks of Serbia are working towards joining payment schemes by May 2026.

initiatives bring significant benefits, such as reduced customs checks and faster clearance times, while strengthening the countries' capacity to prevent and detect illicit trade flows. Enlargement countries must ensure that their digital systems are aligned with the EU digital customs *acquis* upon accession, which is critical to the EU's financial interests and security. Cooperation between the EU and candidate countries in the field of taxation should also be strengthened before accession to prepare candidate countries to join the EU's single market.

Work is ongoing to integrate enlargement partners into **EU industrial supply chains**. Agreements on conformity assessment and acceptance of industrial products are underway with Ukraine, Moldova and Serbia, with implementation for Ukraine anticipated in 2026 already. At the same time, the Commission has proposed a framework to increase the gradual integration of the Western Balkans, Ukraine and Moldova into strategic industrial sectors, with the purpose of facilitating the integration of their industries into European value chains ahead of full EU accession. Enlargement countries can play a significant role in the decarbonisation efforts by accelerating the transition to renewable energy, circularity and supporting value chains for clean technologies and critical raw materials.

Finally, on **energy**, the integration of all enlargement partners into the EU's internal energy market continues under the framework of the Energy Community. Work is underway to integrate Ukraine's electricity market into the EU market by 2027, in parallel with Moldova. This also includes further integration into the EU gas market. The integration of the Western Balkans' energy markets into the EU's continues as well.

#### **III.4 REGIONAL COOPERATION AND GOOD NEIGHBOURLY RELATIONS**

In the Western Balkans, **good neighbourly relations** and **regional cooperation** are essential elements of the Stabilisation and Association and enlargement processes. Overcoming the legacy of the past and addressing disputes arising from the conflicts of the 1990s remain key. Important outstanding bilateral issues still have to be solved, including border issues, delivering justice to victims of war crimes, identifying remaining missing persons, and establishing an accurate record of past atrocities at regional level. Acknowledging the complexity of reconciliation, the EU through its various instruments and policies remains ready to support and facilitate all efforts.

**Bilateral issues** continue to negatively affect the accession process of the enlargement countries and are holding back regional integration. The enlargement framework enables an overall political environment conducive to addressing outstanding bilateral issues in good faith and to finding mutually acceptable solutions, which the Commission may facilitate.

The Western Balkans region has the ambition to create a **Common Regional Market** (CRM) that aims to ensure freedom of movement for people, services, goods and capital. This will facilitate employment and trade and ease customs procedures between the partners. This work on developing the CRM is coordinated by the

**Regional Cooperation Council** and the Central European Free Trade Agreement in partnership with the Western Balkans 6 Chamber Investment Forum, for enhanced engagement with the private sector.

There has been progress in implementing the CRM action plan, with the adoption of five mobility agreements over the past three years, related to travel Identification Documents, recognition of professional and academic qualifications, and access to higher education. Overcoming longstanding difficulties, a number of substantial decisions were taken at the CEFTA Joint-Committee in October 2024, extending the potential benefits arising from the CRM.

**Regional connectivity** remained high on the agenda through cooperation in the areas of transport, energy and digital technologies. The **Transport** Community continued to advance regulatory alignment and regional integration, while promoting transport facilitation through the Green Lanes initiative. As part of these efforts, implementation of the roadmaps on the 11 busiest crossing points, as agreed at the EU-Western Balkans Summit in December 2024, is underway. The European Commission has committed to provide financial support to address infrastructure needs through the Safe and Sustainable Transport Programme, will provide technical support to prepare technical studies for the investments, and is facilitating bilateral discussions with EU neighbours on harmonising procedures. The EU-Ukraine Solidarity Lanes continue to provide logistics routes for critical trade flows between Ukraine, Moldova, the EU and the rest of the world.

In the **digital area**, besides aligning with the EU *acquis* and deploying robust, stable and secure infrastructure (in line with the EU 5G Cybersecurity Toolbox, and comprehensive cyber resilient frameworks), it is also fundamental for the Western Balkans to develop digital identity frameworks and digital public services. The region is committed to creating national digital identity wallets and subsequently a regional 'Balkan digital identity wallet' by the end of 2027. Over 300 municipalities have applied for WiFi for the Western Balkans, and the first hotspots will be installed over the course of 2025. The Commission is also supporting seven European Digital Innovation Hubs in the region, which should help bridge the skills gap in digital technologies, including artificial intelligence, with more hubs to be funded from an ongoing call for proposal.

Existing **bilateral agreements**, including the Prespa agreement between Greece and North Macedonia and the Treaty of Friendship, Good Neighbourliness and Cooperation between Bulgaria and North Macedonia, need to be implemented in good faith by all parties.

For both **Kosovo** and **Serbia**, advancing on their respective EU path continues to depend on meaningful progress in the **normalisation** of their relations. Domestic political preoccupations on both sides have hindered decisive steps towards implementing the 2023 Agreement on the Path to Normalisation and its accompanying annex. In the absence of constructive engagement, both parties risk missing major opportunities. Moving forward on normalisation of relations is also a requirement under the Reform and Growth Facility for the Western Balkans.

**Ukraine** has strategically deepened its diplomatic engagement to strengthen relations with its neighbours, especially with EU Member States. In the context of Russia's war of aggression, Ukraine's EU neighbours in particular, and several candidate countries have provided support to Ukraine through political, humanitarian, economic, technical and defence assistance. Ukraine's dedication to regional stability and integration is reflected by its active participation in various regional formats, e.g. the Eastern Partnership, Central European Initiative, the Organization of Security and Cooperation in Europe, the Organization of the Black Sea Economic Cooperation, the Organization for Democracy and Economic Development, and the Regional Cooperation Council.

**Moldova** maintains good relations with its neighbours and other candidate countries through bilateral, trilateral and regional initiatives. Regular exchanges take place with Ukraine and the Western Balkans countries about the accession process. In the context of Russia's war of aggression against Ukraine, Moldova has strong and improved cooperation with Ukraine and Romania including in trilateral formats particularly on energy security, transport and connectivity at both technical and high levels. The Moldovan government has consistently aligned with international statements condemning Russia's military aggression and shown solidarity with Ukraine.

Re-engagement between **Türkiye** and Greece continued. Türkiye did not engage in any unauthorised drilling activity in the Eastern Mediterranean or flights over Greek islands in the Aegean Sea during the reporting period, but violations of Greek airspace and traffic regulations were reported. Violations of Greek territorial waters continued to be reported with a noticeable increase in incidents compared to the previous reporting period. The unresolved issue over the continental shelf and exclusive economic zones continued to strain bilateral relations, but dialogue continued.

In December 2024, the Council<sup>18</sup> stressed again that the EU attaches particular importance to resumption of and progress in the **Cyprus settlement talks** in further enhancing EU-Türkiye cooperation. In the reporting period, Türkiye did not make progress towards normalising its relations with the Republic of Cyprus and continued not to fulfil its obligation to fully implement the Additional Protocol to the EU-Turkey Association Agreement. Türkiye continued to reject the bi-communal, bi-zonal federation model based on UN Security Council resolutions and continued advocating for a two-state solution. At the same time, Türkiye participated in the two informal five party meetings held under the auspices of the UNSG. The opposition candidate winning elections to lead the Turkish Cypriot community in October 2025 voiced readiness for formal settlement talks. In December 2024, the EU welcomed the steps taken by the UNSG for a resumption of settlement talks and, in May 2025, the re-appointment of the UNSG's Personal Envoy on Cyprus. In May 2025, the European Commission appointed a Special Envoy for Cyprus. The EU has confirmed, most recently in the European Council conclusions of April 2024 and the Council Conclusions of December 2024<sup>19</sup>, its readiness to play an active role in

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<sup>18</sup> <https://data.consilium.europa.eu/doc/document/ST-16983-2024-INIT/en/pdf>

<sup>19</sup> <https://data.consilium.europa.eu/doc/document/ST-16983-2024-INIT/en/pdf>

supporting all stages of the UN-led process, with all the appropriate means at its disposal. It is now of paramount importance that Türkiye commits to and actively contributes to a fair, comprehensive and viable settlement of the Cyprus issue within the UN framework, on the basis of a bi-communal, bi-zonal federation with political equality, and in accordance with the relevant UN Security Council resolutions, as well as in line with the EU *acquis* and the principles on which the EU is founded.

**Georgia** generally maintains good bilateral relations with its neighbours and other enlargement countries. Georgia and Türkiye enjoy a strategic partnership, with high level contacts, including in the framework of a High-Level Strategic Cooperation Council. While Georgia supports Ukraine's territorial integrity and sovereignty, Ukraine has expressed concerns about the non-alignment of Georgia with EU sanctions against Russia and the absence of military-technical cooperation. Georgia and Moldova traditionally enjoy good bilateral relations.

Russia's war of aggression against Ukraine has brought unprecedented instability to the Black Sea region, highlighting the need for a forward-looking engagement. In May 2025, the EU put forward its strategic approach for the **Black Sea region**<sup>20</sup>, which aims to boost connectivity and growth by linking Europe with the South Caucasus and Central Asia. The strategy will reinforce the EU's geopolitical role as a reliable actor in the Black Sea region. The strategy seeks to bring tangible benefits to Black Sea partners (Ukraine, Moldova, Georgia, Türkiye, Armenia and Azerbaijan) and the EU by investing in and deepening key mutually beneficial partnerships and taking forward regional cooperation on connectivity. Future cooperation with the Black Sea region is structured under three pillars: (i) enhancing security, stability, and resilience; (ii) fostering sustainable growth and prosperity; and (iii) promoting environmental protection, climate change resilience and preparedness, and civil protection.

#### **IV. INFORMATION AND PUBLIC ENGAGEMENT**

Joining the EU is a **whole-of-the-society project**, since it is a choice for a societal model based on fundamental rights and democratic values that each country must actively embrace as it will determine its future. The project must be owned not just by the government, but also by opposition, citizens, civil society and local communities. For this choice to become reality, it must be backed by democratic legitimacy, and broad political and societal consensus. This is necessary to secure the support of the public both in the enlargement countries and in the EU and must be reflected in a country's leaderships' engagement with their citizens. Fostering people-to-people dialogue through culture, youth and sport is essential to achieve mutual understanding and trust.

The latest **Special Eurobarometer survey on attitudes towards EU enlargement** among EU citizens showed that a majority of EU citizens (56%) are in favour of further EU enlargement. At the same time, only one in three EU citizens (32%) feel informed about the enlargement process, while two-thirds (67%) say they lack sufficient information. More work is needed across the Union to respond to EU citizens' concerns and explain the benefits of an enlarged Union. Public opinion

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<sup>20</sup> [JOIN \(2025\) 135 final](#)

across the enlargement countries remains broadly positive. **Effective communication**, as well as actively countering foreign information manipulation and interference, including disinformation, is a strategic imperative as these are growing security threats for both the EU and the enlargement countries. Both EU Member States and the enlargement countries have a crucial responsibility to actively inform and empower their citizens with accurate information about the EU accession process. The public deserves clarity on how enlargement decisions are made, and what is done to prepare the union successfully enlarge. Member States must take ownership of the decisions they take and explain them openly at home. The Commission stands ready to support this effort<sup>21</sup> to support building public trust in the process and help enlargement to move forward with the legitimacy it needs.

## V. CONCLUSIONS AND RECOMMENDATIONS

### I.

1. EU membership is a **geostrategic investment** in a strong, stable, secure and united Europe based on **common democratic values**. Investing in enlargement is also in the EU's strategic security and long-term economic interest.
2. Enlargement is and will remain a **strict, fair and merit-based process, based on the objective progress** achieved by each enlargement country. This requires determination to implement irreversible reforms in all areas of EU law, with special emphasis on the fundamentals of the enlargement process. Democracy, the rule of law and fundamental values will continue to be the cornerstones of the EU's enlargement policy. Candidate countries need to adhere to, and deliver on, demanding and lasting reforms, ensuring a permanent transformation of their economies, democratic systems and societies. This requires that the enlargement countries embrace transformational change, build trust and secure cross-societal consensus. The fight against corruption requires continued attention. EU membership is a strategic choice. Partners must embrace and promote EU values firmly and unequivocally. Alignment with the EU's common foreign and security policy, including with EU restrictive measures is a more significant signal than ever of shared values and strategic orientation in the new geopolitical context.
3. **Significant progress has been achieved over the past year.** Given the accelerating pace of the process for some candidates, enlargement is a realistic possibility in the coming years. Based on the work done over the past years, **now it is the time for concrete actions** for enlargement countries and the EU.
4. **Enlargement countries need to step up their efforts**, especially those who presented ambitious objectives of completing accession negotiations.

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<sup>21</sup> The Commission will step up its strategic communication and launch a dedicated enlargement outreach campaign aimed at translating reforms into relatable progress, tackling disinformation, and highlighting the mutual benefits of a larger, stronger Union.

5. The **EU**, for its part, has been supporting this work over the years, through a variety of tools. It has revised its enlargement methodology. Through **gradual integration** it offers enlargement countries the possibility to speed up and deepen their integration into the EU, delivering concrete results for their citizens. It developed a tailored framework with dedicated financial instruments to support enlargement, including the recently adopted growth plans for the Western Balkans and Moldova and the Ukraine Plan, with their respective facilities. It enhanced security and defence cooperation with several enlargement countries.
6. The EU is now taking preparations for a **larger and stronger Union** forward.
  - a. The Commission is preparing the **pre-enlargement policy reviews and reforms**, which assess the impact of enlargement on key policy areas.
  - b. The Commission's proposal for the next multiannual financial framework will provide, through the **new Global Europe Instrument**, the **necessary financial and policy-based support** to help candidate countries and potential candidates progress **along their path** towards membership. The Commission's proposal provides that, in the event of new Member States acceding to the Union, the multiannual financial framework will be revised accordingly pursuant to the relevant Accession Treaties, to take account of the expenditure requirements resulting from such accession to the Union.
  - c. The Commission will also strengthen its outreach across both the Union and in the candidate countries to discuss enlargement, looking at the benefits of an enlarged Union but also at how challenges can be addressed. Effective **communication**, as well as countering foreign information manipulation and interference, including disinformation is a strategic imperative. The Commission and the European External Action Service stand ready to support Member States' efforts to further anchor public trust in the process and help enlargement move forward with the legitimacy it needs.
  - d. To ensure that new Member States continue to safeguard and maintain their track-record on the rule of law, democracy and fundamental rights, the Commission considers that future **Accession Treaties** should contain stronger safeguards against backsliding on commitments made during the accession negotiations.
7. In the Western Balkans, **good neighbourly relations and regional cooperation** are essential elements of the Stabilisation and Association and enlargement processes. Regional cooperation and commitment to the common regional market are also essential for gradual integration. Overcoming the legacy of the past and addressing disputes arising from the conflicts of the 1990s remain key. Outstanding bilateral issues, including succession issues still have to be solved,

including border issues and delivering justice to war crime victims, identifying remaining missing persons, and establishing an accurate record of past atrocities at regional level. Acknowledging the complexity of reconciliation, the EU - through its various instruments and policies - stays ready to support and facilitate all efforts. Under the EU-facilitated Dialogue, normalisation of relations between Kosovo and Serbia is essential for the European path of both partners, who risk losing important opportunities in the absence of progress.

8. **Bilateral issues** continue to negatively affect the accession process and hold back regional integration of enlargement partners. The enlargement framework enables an overall political environment conducive to addressing outstanding bilateral issues and to finding mutually acceptable solutions, which the Commission is ready to facilitate.

## II.

9. In **Montenegro**, the EU accession process is a key priority for the country, with a clear political commitment from the authorities, which is generally reflected in policy decisions. This includes a continued 100% alignment rate with the EU's common foreign and security policy, including sanctions. Lack of clear rules and conflicting secondary legislation on appointment of judges led to institutional crisis in December 2024, which was overcome mid-March 2025. The government has been operating in an overall stable political environment, delivering on reforms and has greatly accelerated preparations for EU accession over the last year. The December 2024 and June 2025 inter-governmental conferences have provisionally closed four additional negotiating chapters and an ambitious plan is in place to proceed with provisionally closing further chapters when conditions are met.

The Commission assessment is that, in line with the negotiating framework, an overall balance is currently ensured between progress under the rule of law chapters, on the one hand, and progress in the accession negotiations across chapters, on the other. The government of Montenegro has continued to reaffirm its objective to close accession negotiations by the end of 2026. The Commission considers that, subject to maintaining the pace of reforms, Montenegro is on track to meet this ambitious objective. To achieve this, Montenegro should focus on delivering on the rule of law chapters and further advance on the critical areas of freedom of expression and media freedom, the fight against corruption and organised crime, accelerating and deepening reforms on the independence, professionalism and accountability of the judiciary and fully aligning with the EU visa policy. The timely filling of high level judicial and prosecutorial positions remains a challenge that needs to be addressed. In sectorial negotiating chapters, the immediate focus needs to be on delivering key pending EU-related reforms and meeting the closing benchmarks, based on the structured and well-planned approach to advance the EU integration agenda. Continued broad political consensus on key reforms remains crucial.

Subject to Montenegro maintaining the pace of progress in preparations for EU membership, the Commission will present, according to the established practice, a draft financial package, followed by draft common positions for closing negotiations on the financial and budgetary provisions, and will start preparing a draft common position for the institutions chapter.

10. Accession negotiations with **Albania** reached unprecedented momentum with four further intergovernmental conferences leading to the opening of negotiations on five clusters. Preparations for the opening of the last cluster this year are well advanced. This outstanding result is a clear recognition of the firm political commitment of Albania and the clear EU aspirations of its society. Albania continued to make progress in reforms under the fundamentals cluster. Albania's full alignment with the EU's common and foreign security policy testifies to its strategic choice.

The Commission assessment is that, in line with the negotiating framework, an overall balance is currently ensured between progress under the rule of law chapters, on the one hand, and progress in the accession negotiations across chapters, on the other. The government of Albania has continued to reaffirm its objective to close accession negotiations by the end of 2027. The Commission considers that, subject to maintaining the pace of reforms, Albania is on track to meet this ambitious objective. The immediate priority for further progress is to intensify reform on the fundamentals, in particular to swiftly complete the fulfilment of the interim benchmarks on the rule of law which could be achieved in the near future. For other chapters of the negotiations, the focus needs to be on stepping up key pending legislative and institutional proposals. This concerns those chapters which could be provisionally closed in the short term, but also those requiring longer term investment or adjustment, such as in the domain of financial services. Albania made progress in reforms on active international cooperation against organised crime and capacity development for financial investigations, but more further efforts are needed in investigations of drug traffickers and increase in identifying and the dismantling of criminal groups. Inclusive and constructive engagement between the ruling party and the opposition as well as with all stakeholders is a necessity for long-lasting reform impact.

11. Despite the very difficult circumstances the country finds itself in on account of Russia's war of aggression, **Ukraine** continued to demonstrate remarkable commitment to the EU accession path over the past year. The accession process of Ukraine moved forward with the completion of the screening process in September 2025. In May, the country adopted roadmaps on the rule of law, public administration reform and on the functioning of democratic institutions, as well as an action plan on national minorities and its negotiating position for the fundamentals cluster. The Commission has positively assessed these roadmaps and the action plan. Ukraine has continued fostering integrity and meritocracy in the judicial system and building an enforcement track record in high-level corruption cases and has launched the reforms of several law enforcement

bodies. The martial law related restrictions upon fundamental rights remain overall proportionate.

Recent negative trends, including a pressure on the specialised anti-corruption agencies and civil society, must be decisively reversed. Continued progress is also required in reinforcing the independence, integrity, professionalism, and efficiency in the judiciary, prosecution and law enforcement sectors, as well as the fight against organised crime. Alignment with EU standards in the protection of fundamental rights needs to be further stepped up, along with the continuation of public administration and decentralisation reforms.

The Ukrainian government has signalled its objective to close accession negotiations by the end of 2028. The Commission is committed to support this ambitious objective but considers that, to meet it an acceleration of the pace of reforms is required, notably with regards to the fundamentals, in particular rule of law. The Commission's assessment is that Ukraine has met the conditions required to open cluster one (fundamentals) as well as clusters six (external relations) and two (internal market). The Commission expects Ukraine to also meet the conditions to open the remaining three clusters by the end of the year. The Commission will continue the work to put the Council in a position to take forward the opening of all clusters before the end of the year. Despite some progress on fundamental reforms, further efforts remain essential.

12. On 28 September 2025, the people of **Moldova** voted in parliamentary elections resulting in a majority firmly committed to advancing the country's EU path. According to OSCE/ODIHR, the elections were well-managed, despite taking place in the context of unprecedented Russian interference. This included well-orchestrated and sophisticated disinformation campaigns, cyberattacks and illicit financing. The accession process of Moldova moved forward this year with the completion of the screening process in September 2025. Moreover, in Spring, the country adopted roadmaps on the rule of law, public administration reform and on the functioning of democratic institutions. The Commission has positively assessed these roadmaps. Moldova has continued to implement important reforms on the path of EU accession, including on vetting and appointment of top judges and prosecutors, on tackling corruption and on media freedom.

The government of Moldova has signalled its objective to provisionally close accession negotiations by early 2028. The Commission is committed to supporting this objective, which is ambitious but achievable, provided Moldova accelerates the current pace of reforms. The Commission's assessment is that Moldova has met the conditions required to open cluster one (fundamentals) as well as clusters six (external relations) and two (internal market). The Commission expects Moldova to also meet the conditions to open the remaining three clusters by the end of the year. The Commission will continue the work to put the Council in a position to take forward the opening of all clusters before the end of the year. Looking ahead, intensified work on the fundamentals will be key,

be it on the rule of law more widely, including consolidation of anti-corruption institutions and delivering a solid track record of investigations, prosecutions and final court rulings, or on continuing public administration reforms.

13. The polarisation in Serbian society has deepened against the background of mass protests taking place across **Serbia** since November 2024, reflecting disappointment of citizens over *inter alia* corruption and the perceived lack of accountability and transparency coupled with instances of excessive use of force against protestors and pressure on civil society. This has led to an increasingly difficult environment where divisive rhetoric has led to a serious erosion of trust amongst the stakeholders which, in turn, impacts the accession process. Reforms have significantly slowed down. Frequent anti-EU narratives also used by political office holders and echoed by media outlets must end. While acknowledging a recent increase in alignment with the EU's common foreign and security policy Serbia should step up its efforts towards a more stable and higher alignment. Serbia should clearly manifest its geopolitical orientation towards the EU, including by starting to align with EU's restrictive measures taken in the context of Russia's war of aggression against Ukraine. Some recent positive developments should be noted. Serbia amended its media legislation to align further with the EU *acquis* and European standards. The Commission assessment from 2021 that Serbia had fulfilled the opening benchmarks for cluster 3 (competitiveness and inclusive growth) remains valid.

Moving forward, the Commission expects the recently relaunched process of appointing the new Council of the regulatory body for electronic media (REM) and the legislative process of adoption of the law on the unified voter register to be completed and implemented in a credible and inclusive manner, involving civil society and all stakeholders, including the opposition. Serbia is expected to overcome the standstill in the area of judiciary and fundamental rights overall and urgently reverse the backsliding on freedom of expression and the erosion of academic freedom as well as ensure progress on the electoral framework and completing the unbundling of the energy sector. Serbia should align its visa-free countries list with that of the EU. Continued attention is needed to preserve the overall balance between progress under the rule of law chapters and normalisation of relations with Kosovo, on the one hand, and the overall pace of accession negotiations across chapters, on the other hand. Under the EU-facilitated Dialogue, Serbia is expected to implement all of its obligations stemming from the Agreement on the Path to Normalisation and its Implementation Annex, as well as all past Dialogue agreements. The EU-facilitated Dialogue aims to promote cooperation, achieve progress on the path to the EU and improve the lives of the people.

The Commission stands ready to support Serbia in making the necessary democratic changes that are expected from a future member of the EU. Serbia needs to overcome the current political impasse and divisions in society by restoring trust amongst political and civil society actors and create conditions for inclusive dialogue, needed for bringing forward required key reforms. Serbia's

commitment to the EU path and its political will to credibly implement the required reforms has to be strengthened and better underpinned by decisive concrete actions and reflected in public communication. Tangible results in fighting corruption and strengthening the rule of law, including independence of the judiciary, media freedom, electoral reforms, ensuring a truly enabling environment for civil society and credible efforts to shut down disinformation and foreign information manipulation are imperative for Serbia to progress on its EU path.

**14. North Macedonia** has continued full alignment with the EU's common foreign and security policy testifies to its strategic choice. The authorities continued to work on the roadmaps on the rule of law, public administration reform and the functioning of democratic institutions, and the action plan on the protection of minorities which need to be finalised in an inclusive process. However, it has not taken decisive steps to advance in the accession negotiations process over the last year. It has not yet adopted relevant constitutional changes with a view to including in the Constitution citizens who live within the borders of the state and who are part of other people, such as Bulgarians, referred to in the Council Conclusions of July 2022, which the country committed to launch and achieve. Bilateral agreements with neighbouring countries need to be implemented in good faith by all parties, including the Prespa agreement between Greece and North Macedonia and the Treaty of Friendship, Good Neighbourliness and Cooperation between Bulgaria and North Macedonia.

Further swift and decisive action is needed on the opening benchmarks, in line with the negotiating framework, with a view to opening the first cluster as soon as possible and when relevant conditions are met. North Macedonia should intensify efforts to deliver on EU-related reforms, in particular under the fundamentals cluster, notably to uphold the rule of law, in particular, by safeguarding judicial independence and integrity, and strengthening the fight against corruption and organised crime. Corruption should be addressed unabatedly, including through the strengthening of enforcement and establishing a solid track record in the investigation, prosecution and final conviction of high-level cases

**15. In Bosnia and Herzegovina**, the political crisis in the *Republika Srpska* entity and the ensuing end of the ruling coalition undermined progress towards EU accession. As a result, only a few reforms were adopted. However, on a positive note, in September 2025, Bosnia and Herzegovina submitted its Reform Agenda to the Commission for agreement. Bosnia and Herzegovina's continued full alignment with the EU's common foreign and security policy testifies to its strategic choice. Following recent institutional changes in the *Republika Srpska* entity, Bosnia and Herzegovina has the opportunity to deliver on reforms on the EU path.

In line with the March 2024 European Council decision to open accession negotiations, the authorities have to bring back focus on taking all relevant steps

set out in the Commission's recommendation of October 2022. This includes the finalisation and adoption of the Law on Courts and the Law on the High Judicial and Prosecutorial Council, in line with European standards. Bosnia and Herzegovina also needs to develop a national plan for the adoption of the *acquis* and urgently appoint the national IPA coordinator. Progress on these issues, as well as the nomination of a chief negotiator, is key for the Commission to present the negotiating framework to the Council and to start the explanatory part of the screening of the EU *acquis*. The issues identified in the Commission's opinion on the country's membership application, including on governance and on constitutional and electoral reforms, should be urgently addressed.

16. **Kosovo** is a potential candidate with a steady commitment to its EU path by all political actors, accompanied by high public support and is fully aligned with the EU's common foreign and security policy. However, Kosovo's domestic scene was tainted with divisive rhetoric in the lead up to the general elections of February 2025, followed by the inability of political actors to form the key institutions until the constitution of the Parliament in October with little willingness shown to reach a negotiated solution. Against this backdrop, following the February 2025 elections, there was an overall deceleration in the pace of reforms, in addition to continued divisive politics. The EU has welcomed the peaceful, inclusive and competitive first round of local elections, with the participation of all communities. Some progress was achieved notably in the fight against serious and organised crime and digital transformation.

In the coming period, Kosovo needs to get back on track on its EU agenda by forging cross-party cooperation and prioritising the much-needed reforms, particular in the area of rule of law and freedom of expression. Kosovo should continue to address unfounded asylum applications to the EU by Kosovo citizens. The Commission stands ready to prepare an Opinion on Kosovo's membership application if so requested. Under the EU-facilitated Dialogue, Kosovo is expected to implement all of its obligations stemming from the Agreement on the Path to Normalisation and its Implementation Annex, as well as all past Dialogue agreements. The EU-facilitated Dialogue aims to promote cooperation, achieve progress on the path to the EU and improve the lives of the people. The Commission has taken the first steps to gradually lift the measures in place from May 2025. The next steps remain conditional on sustained de-escalation in the north. The Commission intends to further lift these measures provided an orderly transfer of local governance in the north is achieved after the second round of the local elections and de-escalation is sustained.

17. **Türkiye** is a candidate country and a key partner for the European Union. Accession negotiations with Türkiye have been at a standstill since 2018, in line with the decision of the Council. The underlying facts leading to this assessment still hold notably in light of the further backsliding in the areas of fundamental rights and rule of law, including the judiciary witnessed this year. Türkiye should apply the highest democratic standards in line with its commitments as a long-

standing member of the Council of Europe and EU candidate country and reverse this backsliding.

The EU has a strategic interest in a stable and secure environment in the Eastern Mediterranean and in the development of a cooperative and mutually beneficial relationship with Türkiye, in particular on the cross-regional security and connectivity agenda to bring the EU closer to the South Caucasus and Central Asia and enhance Black Sea region's security. Geopolitical challenges, as with challenges stemming from the green and the digital transition, call for a stronger partnership with Türkiye. Underpinned by the improved regional stability in the Eastern Mediterranean and promotion of good neighbourly relations, concrete steps were taken on issues of joint interest. High level engagement continued, and the high-level dialogue on economy resumed. High-Level Dialogues on Trade as well as on Migration and Security also took place. Türkiye is a significant regional actor in the area of foreign policy, which is an important element in the context of the EU-Türkiye relationship, even if different views on certain foreign policy issues persist. Türkiye continued to have a very low formal alignment rate with the common foreign and security policy, although interests and aims were often aligned on key developments in the region (peace and connectivity in the South Caucasus, stability in Syria, cease fire in Gaza and two state solution goal). Türkiye implemented specific measures to stop the circumvention of EU sanctions against Russia through its territory and should continue to cooperate with the EU on sanctions circumvention.

A phased, proportionate and reversible approach to energise key areas of cooperation should continue to apply, in line with the Joint Communication of 2023 and European Council conclusions. Türkiye's own constructive efforts should be sustained and EU concerns addressed. Türkiye is expected to respect international law, good neighbourly relations and the sovereignty of EU Member States. Türkiye is expected to actively support the negotiations on a fair, comprehensive and viable settlement of the Cyprus issue within the UN framework, in accordance with the relevant UN Security Council resolutions, including their external aspects, and in line with the principles on which the EU is founded and the *acquis*. Türkiye also needs to fulfil its obligation to ensure full and non-discriminatory implementation of the Additional Protocol to the EU-Turkey Association Agreement.

18. The Commission reiterates its steadfast solidarity with the **Georgian** people and its readiness to continue supporting Georgians on their path towards a European future. The actions taken by the Georgian authorities fall short of the EU's expectations of an EU candidate country. There was serious backsliding in the fundamentals across the board with the adoption of repressive legislation undermining fundamental rights and freedoms, the political instrumentalisation of the judiciary, the persecution of opposition leaders, arbitrary arrests of protesters and journalists and a shrinking civic space. The erosion of the principle of checks and balances and democratic decision-making, combined

with the absence of effective parliamentary oversight, have resulted in an increase of executive power, including state capture. In November 2024, the Georgian authorities' decision not to pursue the opening of accession negotiations unequivocally confirmed their shift away from the policies of previous governments, the European aspirations of the vast majority of the Georgian people, and the commitment inscribed in the Constitution of Georgia of ensuring Georgia's full integration into the EU. In parallel, the Georgian authorities have also systematically disseminated anti-EU rhetoric and disinformation and have not demonstrated any political commitment to pursue the relevant reforms (i.e. the nine steps) set out in the Commission recommendations of 8 November 2023, which are necessary for the country's progress on the EU path. The Georgian authorities' course of action has undermined EU-Georgia relations and moved Georgia away from the EU enlargement process. Consequently, Georgia's EU accession process has effectively come to a standstill. Until Georgian authorities reverse their course of action, the Commission, on its part, and in complementarity with the Council, has downgraded high level political contacts, suspended bilateral assistance directly benefiting the Georgian authorities, as well as stepped up efforts to support civil society and independent media. In January 2025, based on the Commission's proposal, the Council decided the partial suspension of the EU-Georgia Visa Facilitation Agreement and suspended visa exemption for holders of Georgian diplomatic and service/official passports.

Georgia needs to urgently reverse its democratic backsliding and undertake comprehensive and tangible efforts to address outstanding concerns and key reforms with cross-party support and effective civic participation in line with the nine steps set out for candidate status, in full respect of the EU values and principles upon which the European Union is founded. Following the December 2024 European Council Conclusions that the Georgian government's actions have *de facto* led to a halt of the pre-accession process and in light of Georgia's continued backsliding on the fundamentals since then, the Commission considers Georgia a candidate country in name only. The Georgian authorities must demonstrate resolute commitment to reverse course and return to the EU accession path.

## VI. ANNEXES

### Statistical data

Third party indicators related to the status of democracy, good governance and the rule of law in candidate countries and potential candidates



EUROPEAN  
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COM(2025) 690 final

ANNEXES 1 to 2

## ANNEXES

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### **COMMUNICATION FROM THE COMMISSION TO THEEUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC ADN SOCIAL COMMITTEE AND THE EUROPEAN COMMITTEE OF THE REGIONS**

#### **2025 Communication on EU enlargement policy**

{SWD(2025) 750 final} - {SWD(2025) 751 final} - {SWD(2025) 752 final} -  
{SWD(2025) 753 final} - {SWD(2025) 754 final} - {SWD(2025) 755 final} -  
{SWD(2025) 756 final} - {SWD(2025) 757 final} - {SWD(2025) 758 final} -  
{SWD(2025) 759 final}

## ANNEX I

Indexes	THIRD PARTY INDICATORS RELATED TO THE STATUS OF DEMOCRACY, GOOD GOVERNANCE AND THE RULE OF LAW IN CANDIDATE COUNTRIES AND POTENTIAL CANDIDATES <sup>1</sup>									
	Albania	Bosnia and Herzegovina	Kosovo	North Macedonia	Montenegro	Serbia	Türkiye	Georgia	Moldova	Ukraine
<b>Nations in Transit 2024 - Democracy Scores, Freedom House</b> <a href="https://freedomhouse.org/countries/nations-transit/scores">https://freedomhouse.org/countries/nations-transit/scores</a>	Total score: 46/100 (2023: 46/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 36/100 (2023: 37/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 38/100 (2023: 38/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 46/100 (2023: 48/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 46/100 (2023: 46/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 43/100 (2023: 46/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	n/a	Total score: 34/100 (2023: 34/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 36/100 (2023: 36/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)	Total score: 40/100 (2023: 39/100)  Status: Transitional or Hybrid Regime (2023: Transitional or Hybrid Regime)
<b>Freedom in the World 2025 - Global Freedom Score, Freedom House</b> <a href="https://freedomhouse.org/countries/freedom-world/scores">https://freedomhouse.org/countries/freedom-world/scores</a>	Total score: 68/100 (2024: 68/100)  Status: Partly free (2024: Partly free)	Total score: 52/100 (2024: 51/100)  Status: Partly free (2024: Partly free)	Total score: 60/100 (2024: 60/100)  Status: Partly free (2024: Partly free)	Total score: 67/100 (2024: 67/100)  Status: Partly free (2024: Partly free)	Total score: 69/100 (2024: 69/100)  Status: Partly free (2024: Partly free)	Total score: 56/100 (2024: 57/100)  Status: Partly free (2024: Partly free)	Total score: 33/100 (2024: 33/100)  Status: Not free (2024: Not free)	Total score: 55/100 (2024: 58/100)  Status: Partly free (2024: Partly free)	Total score: 60/100 (2024: 61/100)  Status: Partly free (2024: Partly free)	Total score: 51/100 (2024: 49/100)  Status: Partly free (2024: Partly free)
<b>Democracy Index 2024 - The Economist Intelligence Unit</b> <a href="https://www.eiu.com/cei/democracy-index">Democracy Index 2024 - Economist Intelligence Unit</a>	Overall Score: 6.20/10 (2023: 6.28/10)  Rank: 66/167 (2023: 66/167)  Regime type: Flawed democracy (2023: Flawed democracy)	Overall Score: 5.06/10 (2023: 5.00/10)  Rank: 88/167 (2023: 94/167)  Regime type: Hybrid regime (2023: Hybrid regime)	n/a	Overall Score: 6.28/10 (2023: 6.03/10)  Rank: 62/167 (2023: 72/167)  Regime type: Flawed democracy (2023: Flawed democracy)	Overall Score: 6.73/10 (2023: 6.67/10)  Rank: 50/167 (2023: 52/167)  Regime type: Flawed democracy (2023: Flawed democracy)	Overall Score: 6.26/10 (2023: 6.33/10)  Rank: 64/167 (2023: 64/167)  Regime type: Flawed democracy (2023: Flawed democracy)	Overall Score: 4.26/10 (2023: 4.33/10)  Rank: 103/167 (2023: 102/167)  Regime type: Hybrid regime (2023: Hybrid regime)	Overall Score: 4.26/10 (2023: 5.20/10)  Rank: 71/167 (2023: 68/167)  Regime type: Hybrid regime (2023: Hybrid regime)	Overall Score: 6.04/10 (2023: 6.23/10)  Rank: 71/167 (2023: 68/167)  Regime type: Flawed democracy (2023: Flawed democracy)	Overall Score: 4.90/10 (2023: 5.06/10)  Rank: 92/167 (2023: 91/167)  Regime type: Hybrid regime (2023: Hybrid regime)

<sup>1</sup> The table presents the latest available ranking and/or scores by third parties. Additional reference to data from previous assessment is shown in between parenthesis, when available.

<b>World Press Freedom Index 2025 - Reporters without borders</b> <a href="https://rsf.org/en/index">https://rsf.org/en/index</a>	Global Score: 58.18/100 (2024: 54.10/100) Rank: 80/180 (2024: 99/180)	Global Score: 56.33/100 (2024: 58.85/100) Rank: 86/180 (2024: 81/180)	Global Score: 52.73/100 (2024: 60.19/100) Rank: 99/180 (2024: 75/180)	Global Score: 70.44/100 (2024: 73.78/100) Rank: 42/180 (2024: 36/180)	Global Score: 72.83/100 (2024: 73.21/100) Rank: 37/180 (2024: 40/180)	Global Score: 53.55/100 (2024: 54.48/100) Rank: 96/180 (2024: 98/180)	Global Score: 29.40/100 (2024: 31.60/100) Rank: 159/180 (2024: 158/180)	Global Score: 50.53/100 (2024: 53.05/100) Rank: 114/180 (2024: 103/180)	Global Score: 73.36/100 (2024: 74.86/100) Rank: 35/180 (2024: 31/180)	Global Score: 63.93/100 (2024: 65/100) Rank: 62/180 (2024: 61/180)
<b>Rule of Law Index 2024 - World Justice Project</b> <a href="https://worldjusticeproject.org/rule-of-law-index/global/">https://worldjusticeproject.org/rule-of-law-index/global/</a>	Overall Score: 0.48/1 (2023: 0.48/1) Global Rank: 89/142 (2023: 91/140)	Overall Score: 0.52/1 (2023: 0.51/1) Global Rank: 71/142 (2023: 75/140)	Overall Score: 0.56/1 (2023: 0.56/1) Global Rank: 58/142 (2023: 58/140)	Overall Score: 0.53/1 (2023: 0.53/1) Global Rank: 67/142 (2023: 67/140)	Overall Score: 0.57/1 (2024: 0.56/1) Global Rank: 56/142 (2024: 57/142)	Overall Score: 0.47/1 (2023: 0.48/1) Global Rank: 94/142 (2023: 93/140)	Overall Score: 0.42/1 (2023: 0.41/1) Global Rank: 117/142 (2023: 117/140)	Overall Score: 0.60/1 (2023: 0.60/1) Global Rank: 49/142 (2023: 48/140)	Overall Score: 0.54/1 (2023: 0.53/1) Global Rank: 64/142 (2023: 68/140)	Overall Score: 0.49/1 (2023: 0.49/1) Global Rank: 88/142 (2023: 89/140)
<b>Worldwide Governance Indicators 2023 – Rule of Law, The World Bank Group</b> <a href="https://info.worldbank.org/governance/wgi/">https://info.worldbank.org/governance/wgi/</a>	Percentile Rank: 45.75/100	Percentile Rank: 39.62/100	Percentile Rank: 41.51/100	Percentile Rank: 45.28/100	Percentile Rank: 52.36/100	Percentile Rank: 51.42/100	Percentile Rank: 32.55/100	Percentile Rank: 55.19/100	Percentile Rank: 47.17/100	Percentile Rank: 19.81/100
<b>Worldwide Governance Indicators 2023 – Governance Effectiveness, The World Bank Group</b> <a href="https://info.worldbank.org/governance/wgi/">https://info.worldbank.org/governance/wgi/</a>	Percentile Rank: 60.38/100	Percentile Rank: 15.57/100	Percentile Rank: 47.64/100	Percentile Rank: 49.06/100	Percentile Rank: 59.91/100	Percentile Rank: 51.89/100	Percentile Rank: 41.51/100	Percentile Rank: 77.83/100	Percentile Rank: 44.34/100	Percentile Rank: 37.74/100

<b>Worldwide Governance Indicators 2023 – Control of Corruption, The World Bank Group</b> <a href="http://info.worldbank.org/governance/wgi/">http://info.worldbank.org/governance/wgi/</a>	Percentile Rank: 43.40/100	Percentile Rank: 30.66/100	Percentile Rank: 48.58/100	Percentile Rank: 42.45/100	Percentile Rank: 51.89/100	Percentile Rank: 38.21/100	Percentile Rank: 34.91/100	Percentile Rank: 71.23/100	Percentile Rank: 46.70/100	Percentile Rank: 25.94/100
<b>Corruption Perceptions Index 2024 - Transparency International</b> <a href="https://www.transparency.org/en/cpi/2023">https://www.transparency.org/en/cpi/2023</a>	Score: 42/100 (2023: 37/100)	Score: 33/100 (2023: 35/100)	Score: 44/100 (2023: 41/100)	Score: 40/100 (2023: 42/100)	Score: 46/100 (2023: 46/100)	Score: 35/100 (2023: 36/100)	Score: 34/100 (2023: 34/100)	Score: 53/100 (2023: 53/100)	Score: 43/100 (2023: 42/100)	Score: 35/100 (2022: 36/100)
	Rank: 80/180 (2023: 98/180)	Rank: 114/180 (2023: 108/180)	Rank: 73/180 (2023: 83/180)	Rank: 88/180 (2023: 76/180)	Rank: 65/180 (2023: 63/180)	Rank: 105/180 (2023: 104/180)	Rank: 107/180 (2023: 115/180)	Rank: 53/180 (2023: 49/180)	Rank: 76/180 (2023: 76/180)	Rank: 105/180 (2022: 104/180)

## ANNEX II – STATISTICAL ANNEX

### STATISTICAL DATA (as of 11/09/2025), part 1 (Albania – Montenegro)

Demography	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Total population (thousands)		2 794 i	2 762 i	3 464 pi	3 441 pi	1 774 i	:	1 837 i	1 830 i	618 i	617 i	445 997 i	447 704 bpi
Share of 15-64 in total population (%)		68.0 i	67.5 i	:	:	67.1 i	:	65.9 bi	65.5 i	66.1 i	65.7 i	63.9 pi	63.8 bpi
Crude rate of natural population change (per 1 000 inhabitants)		0.2	:	- 4.2 p	- 2.8 p	:	:	-2.4	-1.9	-0.1	1.1	- 2.9 bep	- 2.6 bep
Life expectancy at birth, males (years)		77.4	:	:	:	:	:	:	:	:	75.1	77.9 bep	78.7 bep
Life expectancy at birth, females (years)		80.9	:	:	:	:	:	:	:	:	80.2	83.3 bep	84.0 bep
Labour market	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Economic activity rate for persons aged 20-64: proportion of the population aged 20-64 that is economically active (%)													
Total		79.1 ew	81.4 w	63.6	64.3	43.2 w	45.1 w	:	:	:	79.3	80	
Males		86.7 ew	88.1 w	77.2	77.7	62.4 w	64.1 w	:	:	:	84.7	85.2	
Females		72.0 ew	75.1 w	49.8	50.6	24.5 w	26.8 w	:	:	:	73.9	74.8	
Employment rates, aged 20-64 (% of the population)													
Total		70.4 ew	73.4 w	53.9	55.9	37.9 w	40.3 w	:	:	:	74.6	75.3	
Males		77.4 ew	79.6 w	67.7	69.5	55.7 w	59.4 w	:	:	:	79.9	80.4	
Females		63.7 ew	67.5 w	40	42.1	20.5 w	22.0 w	:	:	:	69.3	70.2	
Persons aged 15-24 not in employment, education or training, % of the population in the age group		23.3 w	22.8 w	18.2	16.5	33.0 w	33.4 w	:	:	:	9.6	9.2	

Labour market (cont.)	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Persons aged 15-29 not in employment, education or training, % of the population in the age group		25.2 w	25.0 w	23.5	22.2	36.6 w	37.6 w	:	:	:	:	11.7	11.3
Employment by main sectors													
Agriculture, forestry and fisheries (%)		33.9 ew	39.4 w	7.3 i	7.6 i	2.2 w	2.4 w	:	:	:	:	3.7 i	3.6 i
Industry (%)		14.3 ew	11.8 w	25.4 i	25.1 i	13.3 w	12.9 w	:	:	:	:	17.7 i	17.4 i
Construction (%)		7.6 ew	7.2 w	9.2 i	9.2 i	11.0 w	11.8 w	:	:	:	:	6.8 i	6.8 i
Services (%)		44.2 ew	41.7 w	58.2 i	58.0 i	73.4 w	72.9 w	:	:	:	:	71.5 i	72.0 i
People employed in the public sector as a share of total employment, persons aged 20-64 (%)		16.1 ew	15.9 w	19.0 w	19.0 w	27.7 w	27.4 w	:	:	:	:	:	:
People employed in the private sector as a share of total employment, persons aged 20-64 (%)		83.9 ew	84.1 w	81.0 w	81.0 w	72.3 w	72.6 w	:	:	:	:	:	:
Unemployment rates (% of the labour force)													
Total		11.0 ew	9.6 w	15.4	13.2	12.5 w	10.8 w	:	:	:	:	6.2	6.1
Males		10.6 ew	9.3 w	12.6	10.9	11.0 w	7.6 w	:	:	:	:	5.9	5.8
Females		11.4 ew	9.9 w	19.8	16.7	16.5 w	18.2 w	:	:	:	:	6.5	6.4
Youth, aged 15-24		24.9 ew	24.5 w	35.1	30.1	21.4 w	17.3 w	:	:	:	:	14.6	14.6
Long-term (>12 months)		7.4 ew	6.8 w	11.4	9.6	8.1 w	7.7 w	:	:	:	:	2.4	2.1
Average nominal monthly wages and salaries (EUR)		595	:	963	:	521 iw	570 iw	517 iw	595 iw	712 iw	792 iw	2 580	:

Education	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Public expenditure on education relative to GDP (%)		2.9 iw	2.9 piw	4.1 iw	:	3.9 iw	4.1 iw	:	:	:	:	4.7 d	:
Participation in early childhood education (children aged 3 and over)	1)	82.2 w	82.9 w	43.6 w	45.0 w	:	:	42.4	46.1	:	78.3	93.3 d	94.6 d
Participation in early childhood education (children aged 3 and over), males	1)	83.1 w	84.3 w	44.1 w	45.3 w	:	:	41.4	46.2	:	78.4	93.2 d	94.5 d
Participation in early childhood education (children aged 3 and over), females	1)	81.1 w	81.5 w	43.2 w	44.7 w	:	:	43.4	46.1	:	78.2	93.3 d	94.7 d
Low achieving 15-year-olds in reading		73.7	:	:	:	:	:	73.6	:	52.9	:	26.2	:
Low achieving 15-year-olds in mathematics		73.9	:	:	:	:	:	66.2	:	59.5	:	29.5	:
Low achieving 15-year-olds in science		67.4	:	:	:	:	:	65.3	:	54.9	:	24.2	:
Early leavers from education and training: percentage of the population aged 18-24 with at most a lower secondary education and not in further education or training (%)		15.5 w	15.7 w	3.6	4.2	7.8 w	7.7 w	:	:	:	:	9.6	9.6
Male early leavers from education and training: proportion of men aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		:	:	3.9	5.2	:	:	:	:	:	:	11.1	11.3
Female early leavers from education and training: proportion of women aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		:	:	3.3	3.1	:	:	:	:	:	:	8	7.7

Education	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks)		0.6 w	0.7 w	1.8	1.8	:	4.5 w	:	:	:	:	11.9	12.8
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), men		0.7 w	0.6 w	1.6	1.5	:	4.3 w	:	:	:	:	10.8	11.6
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), women		0.6 w	0.8 w	2.0	2.0	:	4.8 w	:	:	:	:	12.9	14.0
Exposure of vocational education and training (VET) graduates to work-based learning (% of population aged 20-34)		2.4 w	1.6 w	:	:	:	:	:	:	:	:	60.1	64.6 b
Percentage of the population aged 20-24 with at most lower secondary education, total		15.0 w	17.4 w	6.8	8.1	10.7 w	8.8 w	:	:	:	:	15.4	15
Percentage of the population aged 20-24 with at most lower secondary education, males		16.3 w	19.0 w	6.7	8.8	12.1 w	8.1 w	:	:	:	:	17.6	17.5
Percentage of the population aged 20-24 with at most lower secondary education, females		13.8 w	16.0 w	6.8	7.5	9.4 w	9.6 w	:	:	:	:	13.1	12.3
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, total		57.6 w	57.8 w	87	86.1	73.9 w	77.5 w	:	:	:	:	65.8	65.9
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, males		64.7 w	65.0 w	89.4	87.2	77.4 w	83.0 w	:	:	:	:	66.7	66.3
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, females		51.1 w	51.0 w	84.6	85.1	70.1 w	71.7 w	:	:	:	:	64.9	65.4
Percentage of the population aged 30-34 with tertiary education, total		38.4 ew	36.5 w	28.6	28.2	30.9 w	30.6 w	:	:	:	:	42.8	43.8
						42							

Education	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Percentage of the population aged 30-34 with tertiary education, males		31.9 ew	31.2 w	23.4	23.5	26.3 w	23.9 w	:	:	:	:	37.4	38.4
Percentage of the population aged 30-34 with tertiary education, females		45.5 ew	42.0 w	34.1	33.1	35.9 w	37.4 w	:	:	:	:	48.4	49.4
Share of individuals having at least basic digital skills (% of population aged 16-74)		:	23.3	:	30.1	:	:	:	:	:	52	:	55.6
Share of individuals having at least basic digital skills (% of population aged 16-74), males		:	25.1	:	30.8	:	:	:	:	:	53.5	:	56.7
Share of individuals having at least basic digital skills (% of population aged 16-74), females		:	21.6	:	29.3	:	:	:	:	:	50	:	54.5

National accounts	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27		
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	
<b>Gross domestic product</b>														
In current prices (EUR million)		18 068	21 731	23 324	25 524	8 896	9 680	13 243	14 583 p	5 924	6 964	16 136 043	17 199 528	
Per capita (EUR)		6 500	:	6 733 pi	:	5 015 i	:	7 230 e	7 980 e	9 600	11 000 p	35 950	38 130	
In purchasing power standards (PPS) per capita		12 189	:	:	:	:	:	15 086 e	15 823 e	17 477	19 550 p	35 955	38 135	
In purchasing power standards (PPS) per capita, relative to the EU average (EU-27 = 100)		33.9	:	:	:	:	:	42.0 e	41.5 e	48.6	51.3 p	100	100	
Real (volume) annual rate of change, compared with the previous year (%)		4.8	4	4.2	2	4.3	4.1	2.8	2.1 p	6.4	6.3	3.4	0.5	
<b>Gross value added by main sectors</b>														
Agriculture, forestry and fisheries (%)		19.7	18.7	5.7	5.5	9.2	9	8.4	7.6 p	7.5	6.8	1.9	1.8	
Industry (%)		13.3	13.2	24.2	22.7	23.3	22.8	19.7	19.8 p	11.3	11.6	20	20.1	
Construction (%)		13.4	13.4	5.2	5.4	10.7	10.1	6.9	6.9 p	4.8	4	5.4	5.6	
Services (%)		53.6 i	54.8 i	64.9 i	66.3 i	56.9 i	58.2 i	64.9 i	65.6 pi	76.3 i	77.6 i	72.6 i	72.4 i	
<b>Balance of payments</b>	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	
Net (inward - outward) foreign direct investment (FDI) (million euro)	2)	C	1 253.4 i	730.7 w	863.7 w	556.9 w	650.1 w	654.2 w	488.1 w	783.0 i	434.0 i	- 270 767.2 i	- 93 663.2 pi	
Net (inward - outward) foreign direct investment (FDI) (% of GDP)	2)	C	5.77 i	3.13 iw	3.38 iw	6.26 i	6.72 i	4.94 i	3.35 pi	13.22 i	6.23 i	- 1.68 i	- 0.54 pi	
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (million euro)	3)	C	813.5 i	399.3 w	421.0 w	351.1 i	352.0 i	452.3 i	402.2 i	218.0 i	95.0 i	- 63 667.4 i	- 34 878.0 pi	
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (% of GDP)	3)	C	3.74 i	1.71 iw	1.65 iw	3.95 i	3.64 i	3.42 i	2.76 ip	3.68 i	1.36 i	- 0.39 i	- 0.20 pi	
Remittances as % of GDP		4.60 i	4.26 i	7.86 i	7.36 i	13.7 i	13.80 i	2.65 i	2.33 pi	7.36 i	5.60 i	0.14 i	0.14 i	

External trade in goods	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Share of exports to EU-27 countries in value of total exports (%)		73.4 iw	70.8 iw	73.6 iw	73.0 iw	33.9 iw	32.3 iw	78.3 iw	78.7 iw	30.3 iw	36.1 iw	:	:
Share of imports from EU-27 countries in value of total imports (%)		51.6 iw	50.9 iw	56.9 iw	59.0 iw	42.4 iw	43.0 iw	46.8 iw	49.2 iw	44.3 iw	45.8 iw	:	:
Trade balance (EUR million)		- 3 912	- 3 994	- 5 451	- 5 659	- 4 719	- 5 051	- 3 826	- 2 826	- 2 840	- 3 136	- 435 505	34 922
International trade in goods and services relative to GDP													
Imports (% of GDP)		47.5	43.9	61.9	55.7	71.4	70.3	93.4	80.9 p	74.4	68.6	53.5	48.3
Exports (% of GDP)		37.2	38.4	48.3	43.9	38.6	39.6	72.8	67.8 p	51.5	50	55.4	52
Public finance	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
General government surplus (+) / deficit (-) (%)		:	:	:	:	:	:	:	:	:	:	-3.2	-3.5
General government debt (%)		:	:	:	:	:	:	:	:	:	:	82.5	80.8

Financial indicators	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Annual change in consumer prices (%)	4)	6.6 d	5.3 d	14.0 w	6.1 w	11.6 d	4.9 d	14.0 d	9.0 d	11.9 d	8.7 d	9.2	6.4
Total external debt, relative to GDP (%)	3)	54.1 iw	46.3 piw	51.6 iw	47.4 iw	38.6 iw	39.6 iw	81.5 iw	77.9 piw	158.7 iw	130.1 iw	:	:
Total debt in foreign currency, relative to GDP (%)		:	:	:	:	:	:	:	:	:	:	:	:
Value of reserve assets (including gold) (million euro)		-71.8	911.5	72.8	26.5	67.6	-44	271.6	603.1	164	-482	:	:
International reserves - equivalence in months of imports		6.9 iw	7.3 iw	6.8 iw	7.0 iw	2.2 iw	2.0 iw	3.7 iw	4.6 iw	5.2 iw	3.6 iw	:	:

Business	Note	Albania		Bosnia and Herzegovina		Kosovo*		North Macedonia		Montenegro		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Industrial production index (2015 = 100)	5)	116.1 w	106.3 w	107.2	103.1	:	:	103.6	104.3	107.2	114.1	110.8	108.6 i
Energy	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Net energy imports in relation to GDP		7.1 i	8.8 i	19.9 iw	19.9 iw	30.5 iw	30.5 iw	26.9 i	26.9 i	18.0 i	18.0 i	47.8 i	47.6 i
Length of motorways (kilometres)		25	25	231	231 p	:	:	335	335	0	0	:	:
Net energy imports in relation to GDP		3.9 i	1.1 i	6.5 i	4.2 i	10.0 i	7.6 i	13.4 i	7.6 pi	7.0 i	2.1 i	5.1 i	3.2 i

STATISTICAL DATA (as of 11/09/2025) ,part 2 (Serbia – Ukraine)

Demography	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Total population (thousands)		6 797 i	6 641 i	84 680 i	85 280 i	3 689 i	3 736 i	2 565 i	2 513 pi	40 998 i	:	445 997 i	447 704 bpi
Share of 15-64 in total population (%)		64.4 i	63.4 bi	67.9 i	68.1 i	63.7 i	63.8 i	66.4 i	65.9 pi	67.4 i	:	63.9 pi	63.8 bpi
Crude rate of natural population change (per 1 000 inhabitants)		-6.9	-5.4	6.2	5.1	-1.8	-0.7	- 3.6 ep	- 3.9 ep	:	:	- 2.9 bep	- 2.6 bep
Life expectancy at birth, males (years)		72.7 b	73.8 b	74.3	74.8	69.4	69.9	:	67.5 ep	:	:	77.9 bep	78.7 bep
Life expectancy at birth, females (years)		77.9 b	78.6 b	78.4	79.8	78.1	77.5	:	76.4 ep	:	:	83.3 bep	84.0 bep
Labour market	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Economic activity rate for persons aged 20-64: proportion of the population aged 20-64 that is economically active (%)													
Total	6)	75.9	76.8	63.1	63.1	65.9 w	68.7 w	53.7 w	58.4 w	:	:	79.3	80
Males	6)	83.3	83.3	83.3	82.7	77.9 w	80.3 w	57.8 w	61.9 w	:	:	84.7	85.2
Females	6)	68.7	70.5	42.8	43.5	54.7 w	57.9 w	50.0 w	55.3 w	:	:	73.9	74.8
Employment rates, aged 20-64 (% of the population)													
Total	6)	68.8	69.6	56.5	57.3	54.0 w	56.9 w	52.1 w	55.7 w	:	:	74.6	75.3
Males	6)	75.8	75.9	75.9	76.5	62.2 w	64.9 w	55.8 w	58.8 w	:	:	79.9	80.4
Females	6)	61.8	63.4	37	38	46.4 w	49.4 w	48.7 w	53.0 w	:	:	69.3	70.2
Persons aged 15-24 not in employment, education or training, % of the population in the age group	6)	13.3	12.4	24.1	22.4	23.4 w	21.0 w	17.2 w	13.8 w	:	:	9.6	9.2

Labour market (cont.)	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Persons aged 15-29 not in employment, education or training, % of the population in the age group	6)	15.4	15.2	27.2	25.8	30.7 w	26.9 w	26.2 w	23.1 w	:	:	11.7	11.3
<b>Employment by main sectors</b>													
Agriculture, forestry and fisheries (%)	6) 7)	13.9 i	13.1 i	15.7 i	14.6 i	17.9 w	16.5 w	20.8 w	20.9 w	:	:	3.7 i	3.6 i
Industry (%)	6) 7)	23.8 i	23.5 i	21.7 i	21.3 i	11.9 w	12.2 w	14.8 w	14.4 w	:	:	17.7 i	17.4 i
Construction (%)	6) 7)	5.9 i	5.9 i	6.0 i	6.3 i	8.5 w	8.8 w	7.7 w	7.1 w	:	:	6.8 i	6.8 i
Services (%)	6) 7)	56.4 i	57.4 i	56.6 i	57.8 i	61.8 w	62.4 w	56.7 w	57.6 w	:	:	71.5 i	72.0 i
People employed in the public sector as a share of total employment, persons aged 20-64 (%)		:	:	:	:	23.4 w	23.3 w	28.8 w	28.5 w	:	:	:	:
People employed in the private sector as a share of total employment, persons aged 20-64 (%)		:	:	:	:	76.6 w	76.7 w	71.2 w	71.5 w	:	:	:	:
<b>Unemployment rates (% of the labour force)</b>													
Total	6) 8)	9.6	9.5	10.5	9.4	17.3 w	16.4 w	3.1 w	4.6 w	:	:	6.2	6.1
Males	6) 8)	9.1	9.1	9	7.7	19.3 w	18.3 w	3.6 w	5.0 w	:	:	5.9	5.8
Females	6) 8)	10.1	9.9	13.5	12.7	14.6 w	14.0 w	2.6 w	4.2 w	:	:	6.5	6.4
Youth, aged 15-24	8)	24.3	25	19.5	17.5	39.4 w	34.5 w	10.7 w	11.5 w	:	:	14.6	14.6
Long-term (>12 months)	6) 8)	3.9	3.8	2.5	2	6.6 w	6.5 w	0.7 w	0.8 w	:	:	2.4	2.1
Average nominal monthly wages and salaries (EUR)	6) 9) 10) 11) 12)	920	:	272 iw	333 iw	501 iw	622 iw	525 iw	622 iw	436 iw	441 iw	2 580	:

Education	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Public expenditure on education relative to GDP (%)	13)	3.0 p	:	3.1	:	3.2 iw	3.7 iw	:	:	:	:	4.7 d	:
Participation in early childhood education (children aged 3 and over)	12)	69.2	:	48.6	54.9	148.7 dw	141.3 dw	94.4 w	98.9 w	88.5 w	87.1 w	93.3 d	94.6 d
Participation in early childhood education (children aged 3 and over), males	12)	69.2	:	48.9	55.3	:	:	94.4 w	99.2 w	88.7 w	87.3 w	93.2 d	94.5 d
Participation in early childhood education (children aged 3 and over), females	12)	69.3	:	48.3	54.5	:	:	94.5 w	98.6 w	88.4 w	86.9 w	93.3 d	94.7 d
Low achieving 15-year-olds in reading		36.4	:	29.3	:	:	:	:	:	:	:	26.2	:
Low achieving 15-year-olds in mathematics		43.1	:	38.7	:	:	:	:	:	:	:	29.5	:
Low achieving 15-year-olds in science		35.1	:	24.7	:	:	:	:	:	:	:	24.2	:
Early leavers from education and training: percentage of the population aged 18-24 with at most a lower secondary education and not in further education or training (%)		5.7	5.8	21.2	19.5	6.0 w	5.3 w	21.5 w	17.5 w	:	:	9.6	9.6
Male early leavers from education and training: proportion of men aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		6.5	5.8	22.2	20.1	6.1 w	5.1 w	24.5 w	18.6 w	:	:	11.1	11.3
Female early leavers from education and training: proportion of women aged 18-24 with at most lower secondary education (at most ISCED 2011 level 2) who are not in further education or training		5.0	5.9	20.2	19.0	5.9 w	5.4 w	18.7 w	16.4 w	:	:	8	7.7

Education	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks)		5.1	6.1	6.7	7.4	1.6 w	1.7 w	1.3 w	:	:	:	11.9	12.8
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), men		4.4	5.5	6.4	7.0	1.3 w	1.6 w	1.1 w	:	:	:	10.8	11.6
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), women		5.7	6.7	7.0	7.8	1.8 w	1.8 w	1.4 w	:	:	:	12.9	14.0
Exposure of vocational education and training (VET) graduates to work-based learning (% of population aged 20-34)		17.2	21.4	:	:	:	:	:	:	:	:	60.1	64.6 b
Percentage of the population aged 20-24 with at most lower secondary education, total	6) 14)	6.5	6.3	26.2	23.5	6.0 w	5.3 w	26.5 w	22.4 w	:	:	15.4	15
Percentage of the population aged 20-24 with at most lower secondary education, males	6)	6.9	5.9	28	24.6	5.9 w	4.3 w	28.0 w	22.5 w	:	:	17.6	17.5
Percentage of the population aged 20-24 with at most lower secondary education, females	6)	6.1	6.7	24.3	22.4	6.1 w	6.4 w	25.0 w	22.2 w	:	:	13.1	12.3
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, total	6)	85.9	85.9	50.8	53.8	78.1 w	76.4 w	62.7 w	65.2 w	:	:	65.8	65.9
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, males	6)	87.4	87.5	54.6	58	83.4 w	79.4 w	62.8 w	67.4 w	:	:	66.7	66.3
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, females	6)	84.4	84.2	47	49.4	72.2 w	72.9 w	62.7 w	63.0 w	:	:	64.9	65.4
Percentage of the population aged 30-34 with tertiary education, total	6)	36.1	38.2	37.6	39.9	35.2 w	35.6 w	31.8 w	31.3 w	:	:	42.8	43.8

Education	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Percentage of the population aged 30-34 with tertiary education, males	6)	30.7	29.8	37.4	39.2	30.4 w	31.2 w	27.8 w	23.5 w	:	:	37.4	38.4
Percentage of the population aged 30-34 with tertiary education, females	6)	41.6	46.9	37.9	40.5	40.1 w	40.3 w	35.2 w	38.1 w	:	:	48.4	49.4
Share of individuals having at least basic digital skills (% of population aged 16-74)		:	33.6	:	33.1	32.4 w	34.5 w	:	:	:	:	:	55.6
Share of individuals having at least basic digital skills (% of population aged 16-74), males		:	35.5	:	36.8	30.5 w	33.5 w	:	:	:	:	:	56.7
Share of individuals having at least basic digital skills (% of population aged 16-74), females		:	31.8	:	29.4	34.1 w	35.4 w	:	:	:	:	:	54.5

National accounts	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
<b>Gross domestic product</b>													
In current prices (EUR million)	13) 15)	63 501 p	75 204 p	862 310	1 030 514	23 662 w	28 464 w	13 795 w	15 454 w	154 006	167 632	16 136 043	17 199 528
Per capita (EUR)	6) 13) 15)	9 530 p	11 350 p	10 150	12 080	6 374 w	7 661 w	5 455 w	6 288 w	:	:	35 950	38 130
In purchasing power standards (PPS) per capita	15)	16 449 p	18 650 p	24 509	27 458	:	:	17 461 w	20 910 w	:	:	35 955	38 135
In purchasing power standards (PPS) per capita, relative to the EU average (EU-27 = 100)	15)	45.7 p	48.9 p	68.2	72	:	:	30.9 ew	34.9 ew	:	:	100	100
Real (volume) annual rate of change, compared with the previous year (%)	13) 15)	2.6 p	3.8 p	5.5	5.1	11.0 w	7.8 w	- 4.6 w	1.2 w	-28.8	5.5	3.4	0.5
<b>Gross value added by main sectors</b>													
Agriculture, forestry and fisheries (%)	13) 15) 16)	6.3 p	4.4 p	7.2	6.9	7.6 w	6.9 w	9.4 w	7.1 w	9.7	8.6	1.9	1.8
Industry (%)	13) 15) 16)	24.1 p	22.2 p	29.5	25.8	16.5 w	14.1 w	13.3 w	12.2 w	18.9	19.9	20	20.1
Construction (%)	13) 15) 16)	5.6 p	5.9 p	5.5	6.2	8.0 w	7.6 w	8.8 w	8.3 w	1.5	1.8	5.4	5.6
Services (%)	13) 15) 16)	64.0 pi	67.5 pi	57.7 i	61.1 i	67.9 w	71.4 w	68.4 w	71.3 w	69.9 i	69.7 i	72.6 i	72.4 i
<b>Balance of payments</b>	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Net (inward - outward) foreign direct investment (FDI) (million euro)	12)	4 328.2 w	4 261.6 w	8 170.2 i	4 324.7 i	1 837.9 w	1 493.1 w	514.0 w	315.8 w	249.9 w	4 102.8 w	- 270 767.2 i	- 93 663.2 pi
Net (inward - outward) foreign direct investment (FDI) (% of GDP)	12) 13) 15)	6.82 pi	5.67 pi	0.95 i	0.42 i	7.77 iw	5.25 iw	3.73 iw	2.04 iw	0.16 iw	2.45 iw	- 1.68 i	- 0.54 pi
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (million euro)	12)	1 430.0 i	2 122.0 i	2 793.1 i	1 939.1 i	621.3 w	489.8 w	:	:	92.4 w	3 323.5 w	- 63 667.4 i	- 34 878.0 pi
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (% of GDP)	12) 13)	2.25 pi	2.82 pi	0.32 i	0.19 i	2.63 iw	1.72 iw	:	:	0.06 iw	1.98 iw	- 0.39 i	- 0.20 pi
Remittances as % of GDP	12) 13) 15)	6.31 pi	5.25 pi	0.02 iw	0.02 iw	9.48 iw	7.92 iw	8.29 diw	6.72 diw	1.03 iw	0.99 iw	0.14 i	0.14 i

External trade in goods	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Share of exports to EU-27 countries in value of total exports (%)	12)	66.0 iw	65.7 iw	40.4 iw	40.8 iw	15.4 iw	11.6 iw	58.4 iw	65.4 iw	63.6 iw	64.7 iw	:	:
Share of imports from EU-27 countries in value of total imports (%)	12)	51.9 iw	53.6 iw	25.5 iw	29.0 iw	22.6 iw	24.5 iw	47.4 iw	48.3 iw	49.1 iw	51.1 iw	:	:
Trade balance (EUR million)	12)	- 10 386	- 8 178	- 100 663	- 97 406	- 7 563 iw	- 8 802 iw	- 4 673 iw	- 4 275 iw	- 10 843 iw	- 25 314 iw	- 435 505	34,922
International trade in goods and services relative to GDP													
Imports (% of GDP)	13) 15)	71.2 p	59.4 p	42.6	34.4	62.2 w	57.9 w	70.9 w	58.9 w	52	49.2	53.5	48.3
Exports (% of GDP)	13) 15)	60.7 p	55.1 p	38.6	31.9	52.5 w	49.3 w	41.2 w	35.1 w	35.4	28.3	55.4	52
Public finance	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
General government surplus (+) / deficit (-) (%)	12) 13)	:	:	:	:	- 2.4 pw	- 2.3 w	- 3.2 ew	- 5.1 ew	- 15.3 w	- 19.5 w	-3.2	-3.5
General government debt (%)	12) 13) 17)	:	:	:	:	39.1 pw	38.8 w	34.2 ew	35.4 ew	77.8 w	83.3 w	82.5	80.8

Financial indicators	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Annual change in consumer prices (%)	12) 18)	11.7 d	12.1 d	72.3 d	54.0 d	11.8 w	2.1 w	28.7 w	13.4 w	20.2 w	12.9 w	9.2	6.4
Total external debt, relative to GDP (%)	12) 13) 15)	66.0 piw	60.4 piw	50.1 iw	44.8 iw	94.9 iw	77.8 iw	65.3 iw	58.9 iw	79.7 iw	86.8 iw	:	:
Total debt in foreign currency, relative to GDP (%)		:	:	:	:	:	:	:	:	:	:	:	:
Value of reserve assets (including gold) (million euro)	12)	2 919.0	5 104.0	13 110.7	- 1 949.6	4 591.6 w	4 528.2 w	4 206.0 w	4 903.5 w	26 751.2 w	36 459.0 w	:	:
International reserves - equivalence in months of imports	12)	5.2 iw	6.7 iw	4.0 iw	4.4 iw	3.7 iw	3.3 iw	5.2 iw	6.5 iw	4.0 iw	5.3 iw	:	:

Business	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Industrial production index (2015 = 100)	12) 19)	120.6	123.4	143.3	144.6	147.2 w	148.7 w	115.1 w	110.3 w	66.5 w	71.0 w	110.8	108.6 i
Infrastructure	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Density of railway network (lines in operation per thousand km <sup>2</sup> )		43.6 iw	43.6 iw	13.7 i	14.6 i	16.0 iw	16.0 iw	34.0 iw	34.0 iw	:	:	47.8 i	47.6 i
Length of motorways (kilometres)	12)	941	963	3 633	3 726	263 w	271 w	0	0	15 pw	15 pw	:	:
Energy	Note	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Net energy imports in relation to GDP	13) 15)	8.4 pi	4.6 pi	8.8 i	4.8 i	1.8 iw	1.1 iw	9.5 iw	6.0 iw	:	:	5.1 i	3.2 i

Source: Eurostat and/or the statistical authorities of the enlargement countries

: = not available

b = break in series

C = confidential value

d = definition differs

e = estimated value

p = provisional

i = Eurostat estimate

w= data supplied by and under the responsibility of the national statistical authority and published on an "as is" basis and without any assurance as regards their quality and adherence to EU statistical methodology

\* = This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo Declaration of Independence.

\*\* = Data shown for Georgia exclude the regions of Abkhazia and South Ossetia over which the government of Georgia does not exercise control.

\*\*\* = The data managed by the National Bureau of Statistics of the Republic of Moldova does not include data from the Transnistrian region over which the government of the Republic of Moldova does not exercise control.

Footnotes:

- 1) Bosnia and Herzegovina: Since 2022, children who attended a preschool programme prior to enrolling in school and who did not regularly attend preschool are also included.
- 2) Bosnia and Herzegovina: Based on IMF balance of payments manual, Asset - Liability Approach.
- 3) Bosnia and Herzegovina: Based on IMF balance of payments manual, sixth edition and OECD Benchmark Definition of Foreign Direct Investment - 4th edition.
- 4) Bosnia and Herzegovina: Consumer price inflation.
- 5) Albania: Based on NACE Rev. 2. Coverage is Sections B to D.
- 6) Ukraine: Data on Ukraine for the years 2021-2024 is limited due to exemption under the martial law from mandatory data submission to the State Statistics Service of Ukraine, effective as of 3 March 2022.
- 7) Georgia: Since 2020 - NACE Rev.2, before 2020 - NACE Rev.1.1.
- 8) Georgia: Persons aged 15 years and older.
- 9) Serbia: Wages and salaries are obtained from administrative sources (tax administration records). Average earnings are calculated on the basis of the total amount of accrued earnings for the reporting month and the number of full-time equivalent (FTE) employees.
- 10) Türkiye: Source: Income and Living Conditions Survey.
- 11) Moldova: Includes units with one or more employees.
- 12) Ukraine: Excluding the temporarily occupied territories of the Autonomous Republic of Crimea, the city of Sevastopol and a part of the temporarily occupied territories in the Donetsk and Luhansk regions.
- 13) Georgia: Based on 2008 SNA.
- 14) Georgia: Persons without education are excluded.
- 15) Moldova: Based on 2008 SNA.

- 16) Georgia: Calculations are made according to NACE Rev. 2.
- 17) Ukraine: State and state guaranteed debt.
- 18) Moldova: Consumer price inflation.
- 19) Georgia: Seasonally adjusted data.

