



Western Balkans and Eastern Partnership candidate countries' path to the EU: present and future

WP3 – Horizon scanning for InvigoratEU's visioning process

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About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

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About the project: www.invigorat.eu

Our aim: To identify critical drivers and trends for Eastern Partnership (EaP) candidate countries and the Western Balkans (WB) in their path to the EU. To visualize existential threats, challenges and opportunities.

How? Literature review of foresight studies concerning the EU, and its candidate countries from the Eastern Partnership (i.e. Georgia, Moldova and Ukraine) and Western Balkans (i.e. Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia). This is important to highlight diverging trajectories and the areas in which cooperation and integration with the EU are most needed. If there are specific gaps in foresight studies, data will be used to complete the analysis.



Horizon scanning is “a systematic examination of information to identify potential threats, risks, emerging issues and opportunities, beyond the Parliamentary term, allowing for better preparedness and the incorporation of mitigation and exploitation into the policy making process” (UK Cabinet, 2013).

Western Balkans and Eastern Partnership countries' candidatures to the EU

	Applied for membership	Became candidate	Membership negotiations opened
N. Macedonia	2004	2005	2022
Montenegro	2008	2010	2012
Serbia	2008	2010	2012
Albania	2009	2014	2022
Bosnia and H.	2016	2022	2024
Moldavia	2022	2022	2023
Ukraine	2022	2022	2023
Georgia	2022	2023	
Kosovo	2022		

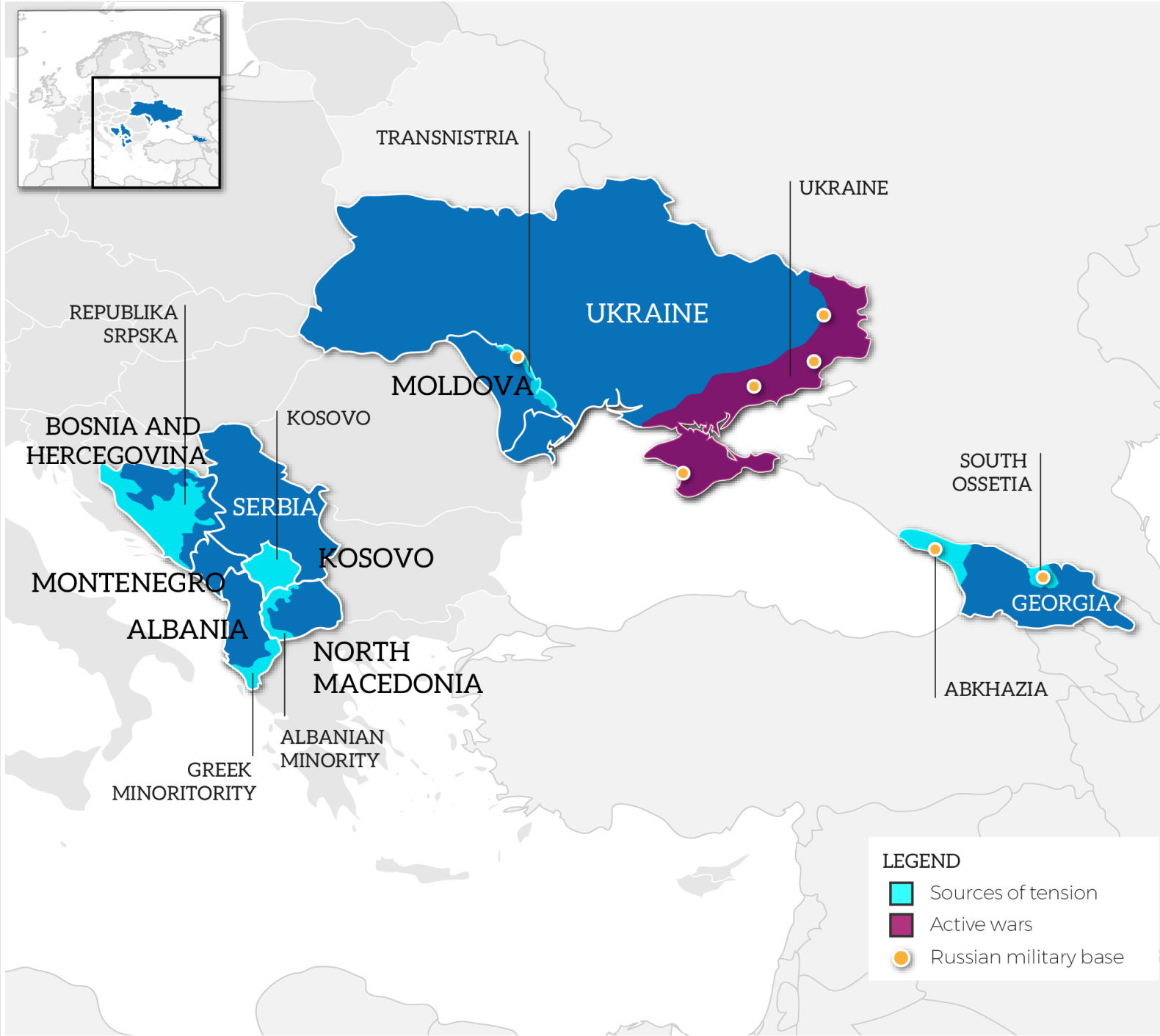


Map of tensions in the region

Major tensions are related to territorial disputes, rogue provinces, minority issues, foreign interference and war of aggression.

	Membership Action Plan	Membership
Albania	1999	2009
Ukraine	2008 ¹	
Georgia	2008 ¹	
Montenegro	2009	2017
N. Macedonia	1999	2020
Serbia		
Moldavia		
Bosnia H.	2010	
Kosovo		

1. Year when NATO allies promised Membership Action Plan.



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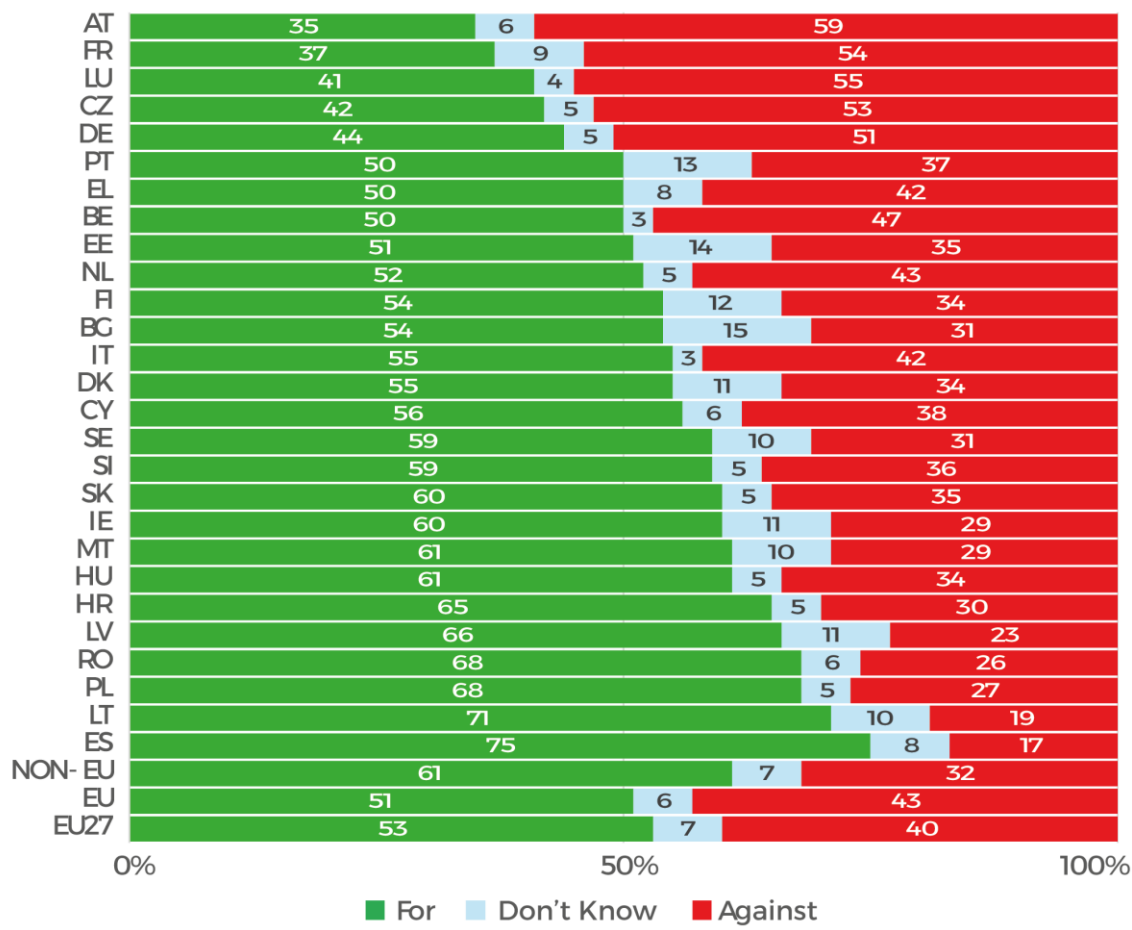
1. Public opinion

Key drivers and trends

1. Public opinion in five EU countries, including France and Germany, oppose further EU enlargement.
2. EU citizens have noted potential challenges such as instability, insecurity, and complex decision-making at the EU level that could arise from further EU enlargement.
3. Support for EU integration in candidate countries has stalled recently.

Public opinion in five EU countries, including France and Germany, oppose further EU enlargement

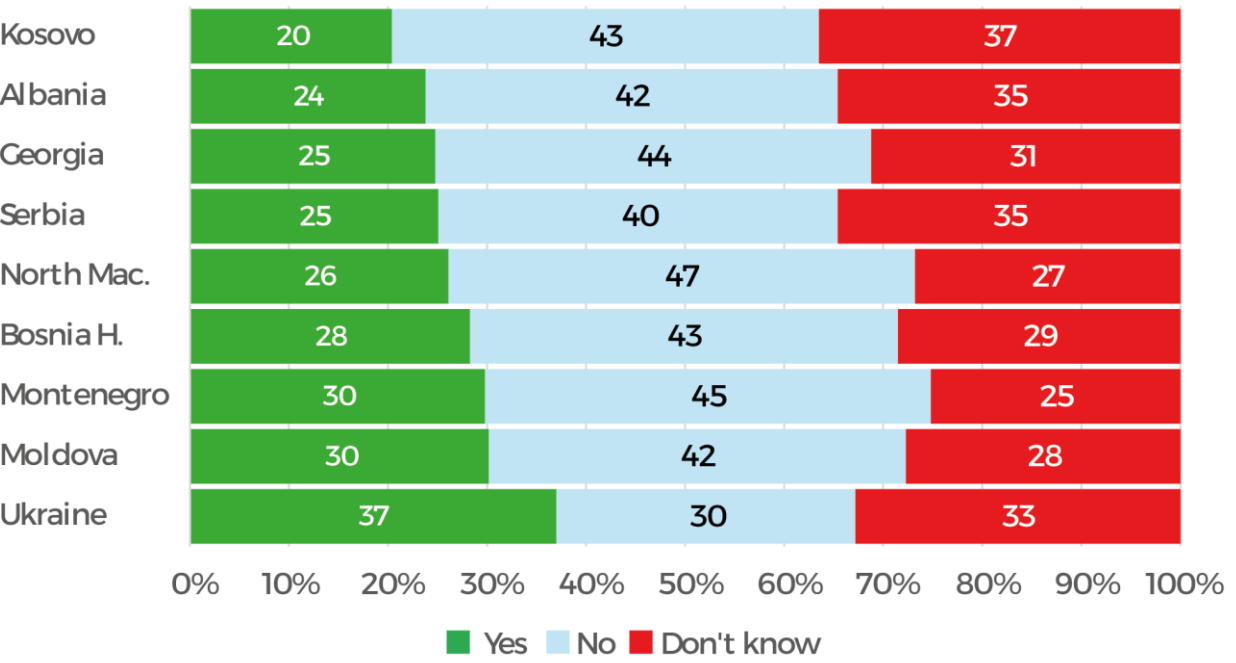
EU citizens' support to further enlargement (% , 2024)



In France, Germany, Italy, and Austria – the domestic political context is likely to become less accepting of enlargement in the coming months and years (Buras and Morina, 2023).

Source: Standard Eurobarometer 102 - Autumn 2024 and ECFR (2023).

Should the following countries be able to join the EU?
Average across 6 countries polled in 2023 (Austria, Germany, France, Poland, Romania, Denmark), %



Europeans show openness towards Ukraine's potential accession to the EU, despite acknowledging the associated economic and security risks. Additionally, there is significant support for Moldova and Montenegro joining the European Union. Conversely, there is higher opposition regarding the accession of Kosovo, Albania, Serbia, and Georgia.

EU citizens have noted potential challenges such as instability, insecurity, and complex decision-making at the EU level that could arise from further EU enlargement

What do you think would be the primary consequences of a further EU enlargement? (Max. 3 answers) (% , 2024)

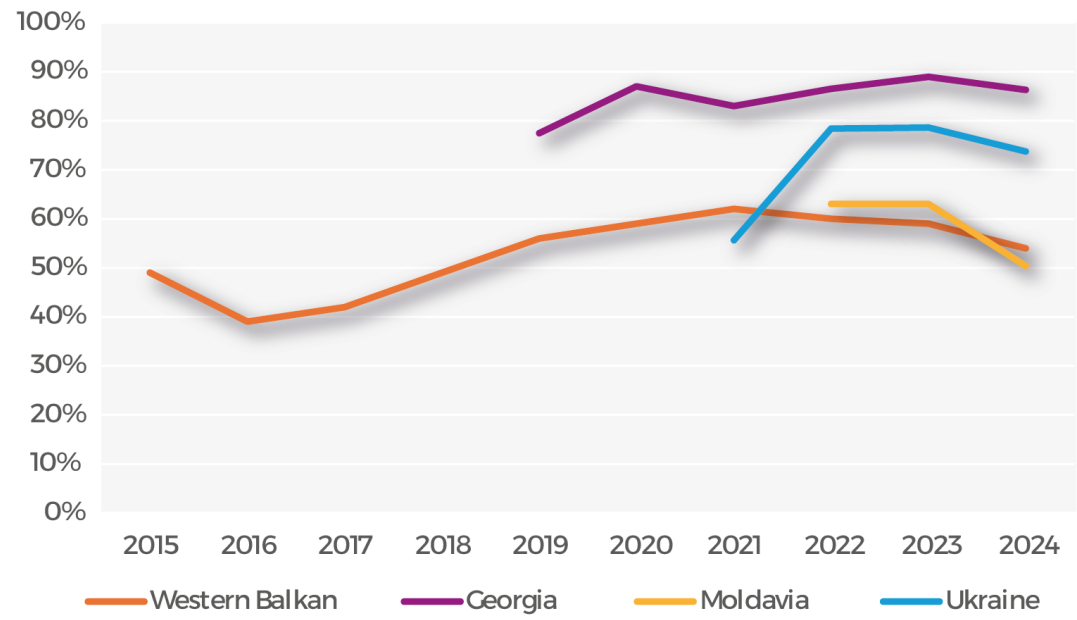
	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY
Increased instability and insecurity	29	30	22	37	30	32	28	25	32	17	34	25	33	29
Complicated decision-making at EU level	29	31	21	26	58	37	33	27	30	26	26	24	25	30
Economic opportunities due to an enlarged market	27	29	30	19	29	26	28	31	28	28	23	35	29	34
Cultural diversity	27	26	21	21	25	25	21	26	36	31	33	27	27	15
Increased geopolitical weight for the EU at the global level	25	24	22	14	31	25	17	25	26	27	22	21	25	26
Increased stability and security	22	20	21	18	29	23	15	25	28	21	14	23	24	33
Negative impact on your country's labour market	22	28	19	23	17	18	27	21	31	15	32	25	24	28
Reduced EU investments in your country	18	18	19	23	15	18	30	20	22	14	16	29	19	18

	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Increased instability and insecurity	26	18	35	28	25	28	38	22	36	23	31	27	27	22
Complicated decision-making at EU level	33	22	34	20	18	54	35	17	14	17	22	24	47	55
Economic opportunities due to an enlarged market	28	27	20	39	35	32	26	26	21	31	32	35	38	35
Cultural diversity	21	24	32	21	28	27	24	20	22	20	28	29	36	24
Increased geopolitical weight for the EU at the global level	19	23	22	25	24	35	28	25	13	24	19	29	32	45
Increased stability and security	26	31	13	24	25	28	19	27	16	23	20	28	23	33
Negative impact on your country's labour market	20	21	26	23	24	14	41	17	35	24	18	22	10	11
Reduced EU investments in your country	23	18	13	24	23	12	25	19	16	22	13	22	17	17

Citizens from Denmark, Sweden and the Netherlands are particularly concerned about potential complications in decision-making due to enlargement. Polls show that citizens are aware of the economic opportunities, cultural diversity, and increased geopolitical influence for the EU resulting from further enlargement.

Support for EU integration in candidate countries has stalled recently

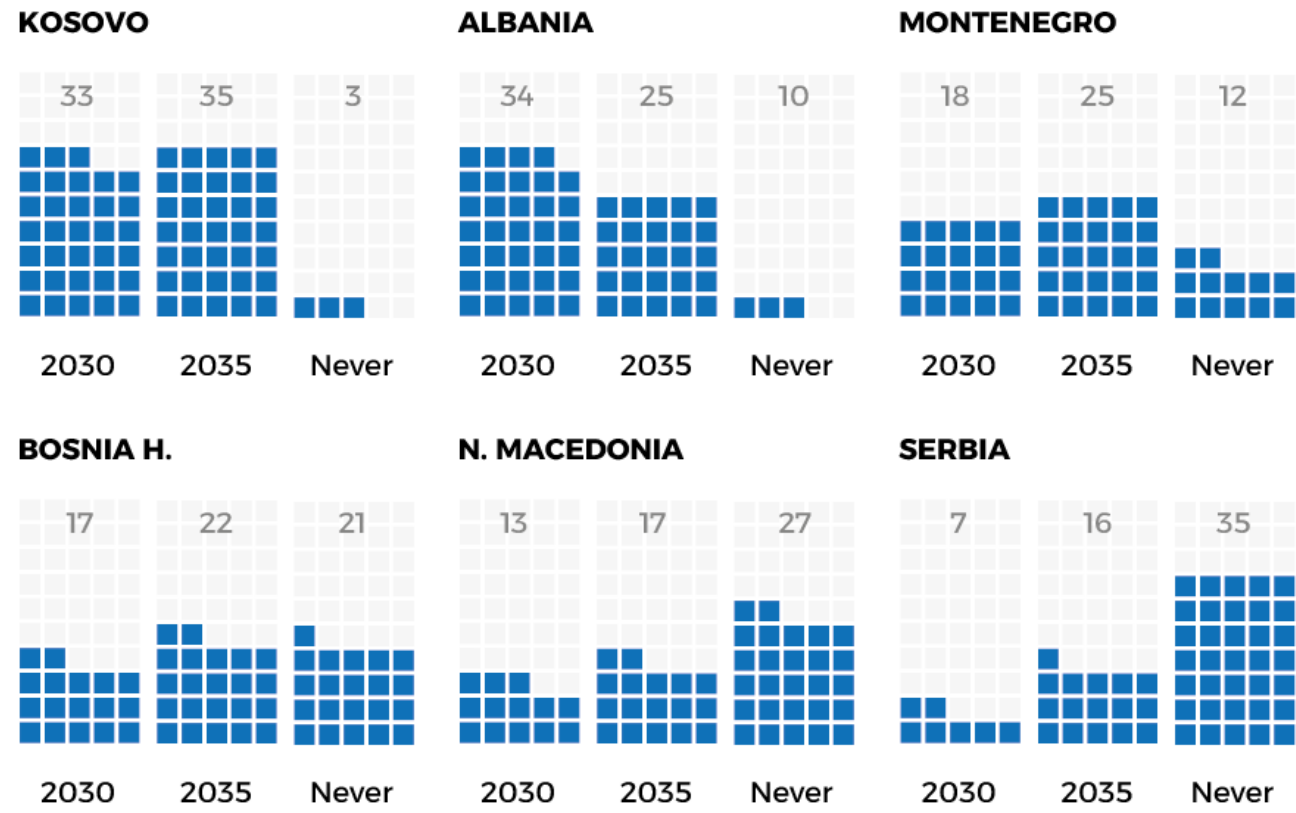
Citizens' support to EU integration (% , 2024)



* Moldova's polls exclude Transnistria. The 2024 data is based on the referendum results on whether the country should amend the Constitution of Moldova to include the Moldovan citizens' wish for European Union membership. Ukraine's recent polls do not include occupied territories or active conflict zones.

Source: Balkan Eurobarometer 2024 and IRIS.

Expect membership (% population) to happen in:



Most citizens in Kosovo and Albania believe their country will join the EU within the next decade. This contrast with the opinion of citizens in EU countries (Austria, Germany, France, Poland, Romania, Denmark) where less than 25% of the population consider they should be able to join the EU. Nearly one third of Serbians and Macedonians think it will never happen.

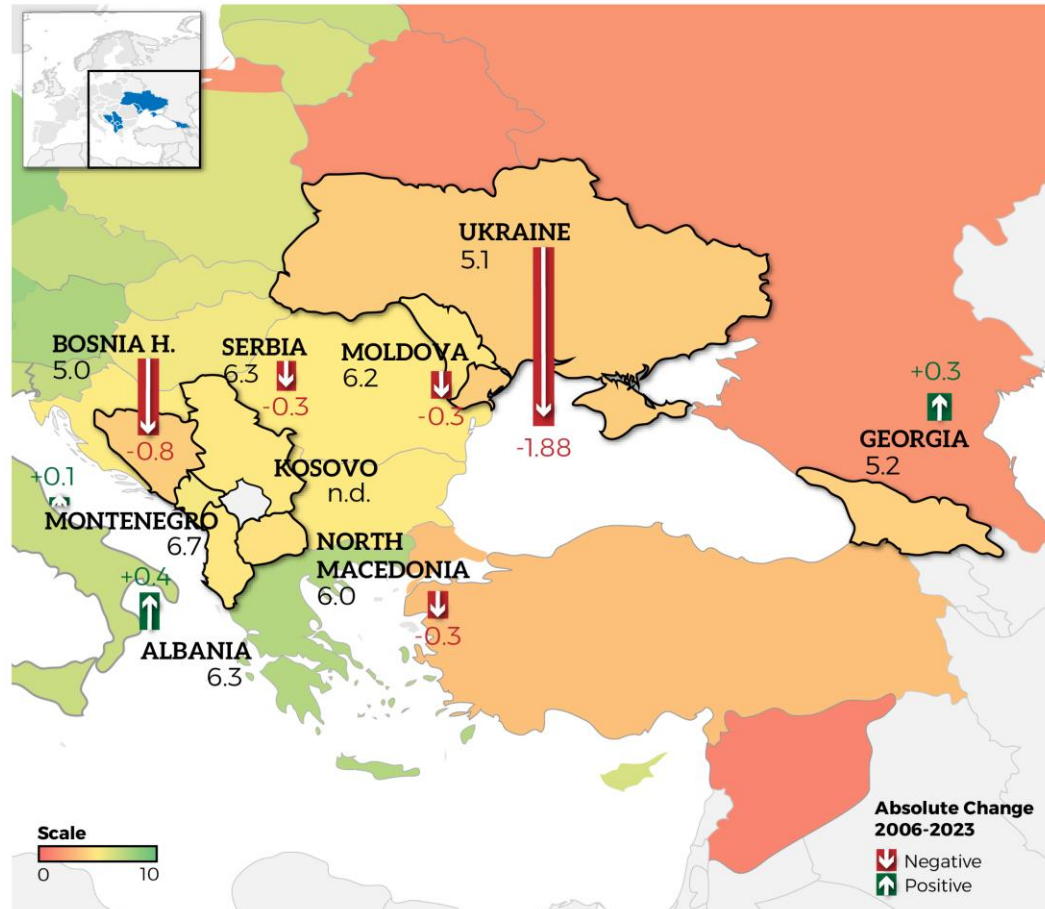
2. Governance indicators and trends

Key drivers and trends

1. Most WB and EaP countries are considered hybrid regimes and partly free, hindering their path to the EU.
2. WB and EaP countries exhibit distinct positions and trends regarding the processes by which governments are selected, monitored, and replaced.
3. WB and EaP countries exhibit distinct positions and trends regarding political stability and absence of violence and terrorism.
4. The capacity of the government to formulate and implement effective policies has improved in all countries, with the exception of Bosnia and Herzegovina.
5. There are significant differences in citizens' perceptions of their government's ability to formulate and implement sound policies and regulations.
6. Most WB and EaP countries have improved their business environments to align more closely with the EU but are lagging in digitalization.
7. Most countries, especially Georgia and Serbia, have significantly improved rule of law standards, while it remains notably weak in Ukraine.
8. Corruption control has improved in Moldova, Albania, Kosovo, and Ukraine but has worsened in Bosnia, North Macedonia, and Serbia.
9. Several WB and EaP countries are very vulnerable to organized crime and political destabilization. However, sanctions do not always effectively address these issues.
10. The end of the war in Ukraine could lead to a substantial outflow of weapons from the conflict zone to other countries.

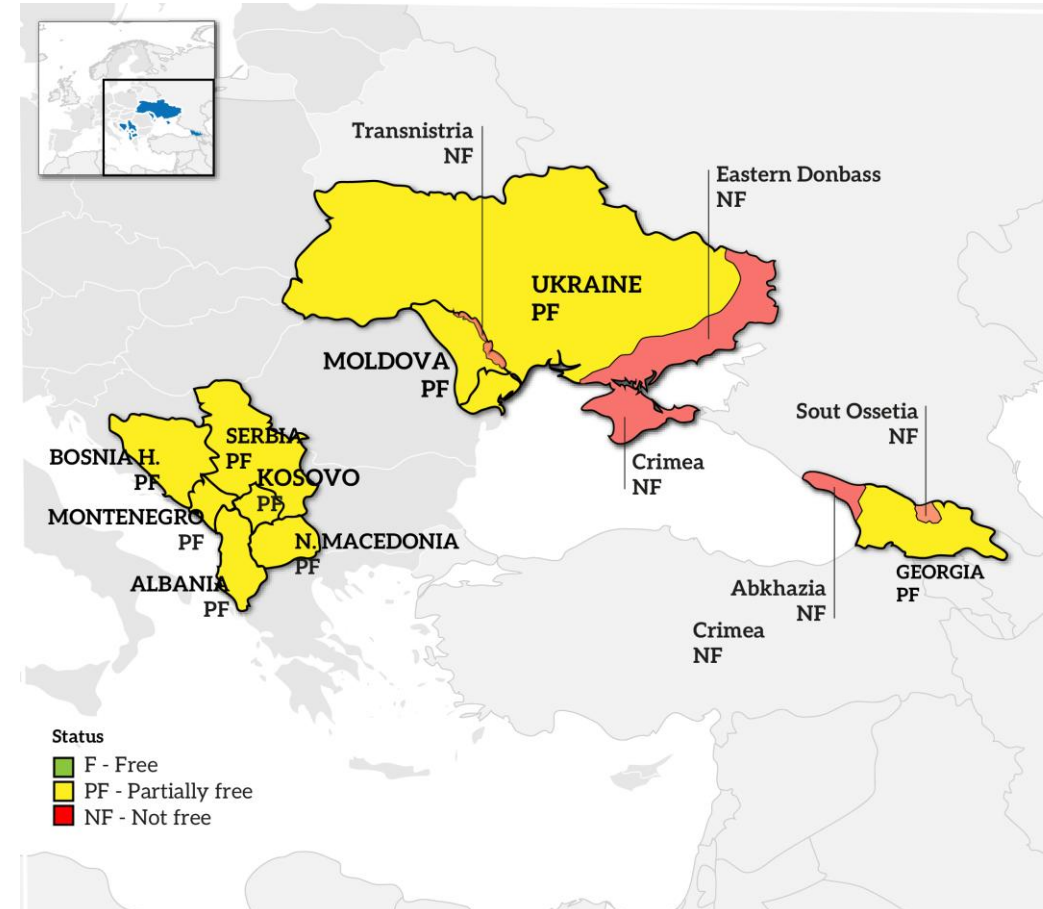
Most WB and EaP countries are considered hybrid regimes and partly free, hindering their path to the EU

The Economist Democracy Index (2023)



An index score of 8.01 to 10 (out of 10) indicates a full democracy, while countries that fall between 6.01 and 8.01 are considered flawed democracies. Countries that score lower on the index than 6.01 are not considered democracies.

Freedom House Index. Index score (-3, 100), (2024)

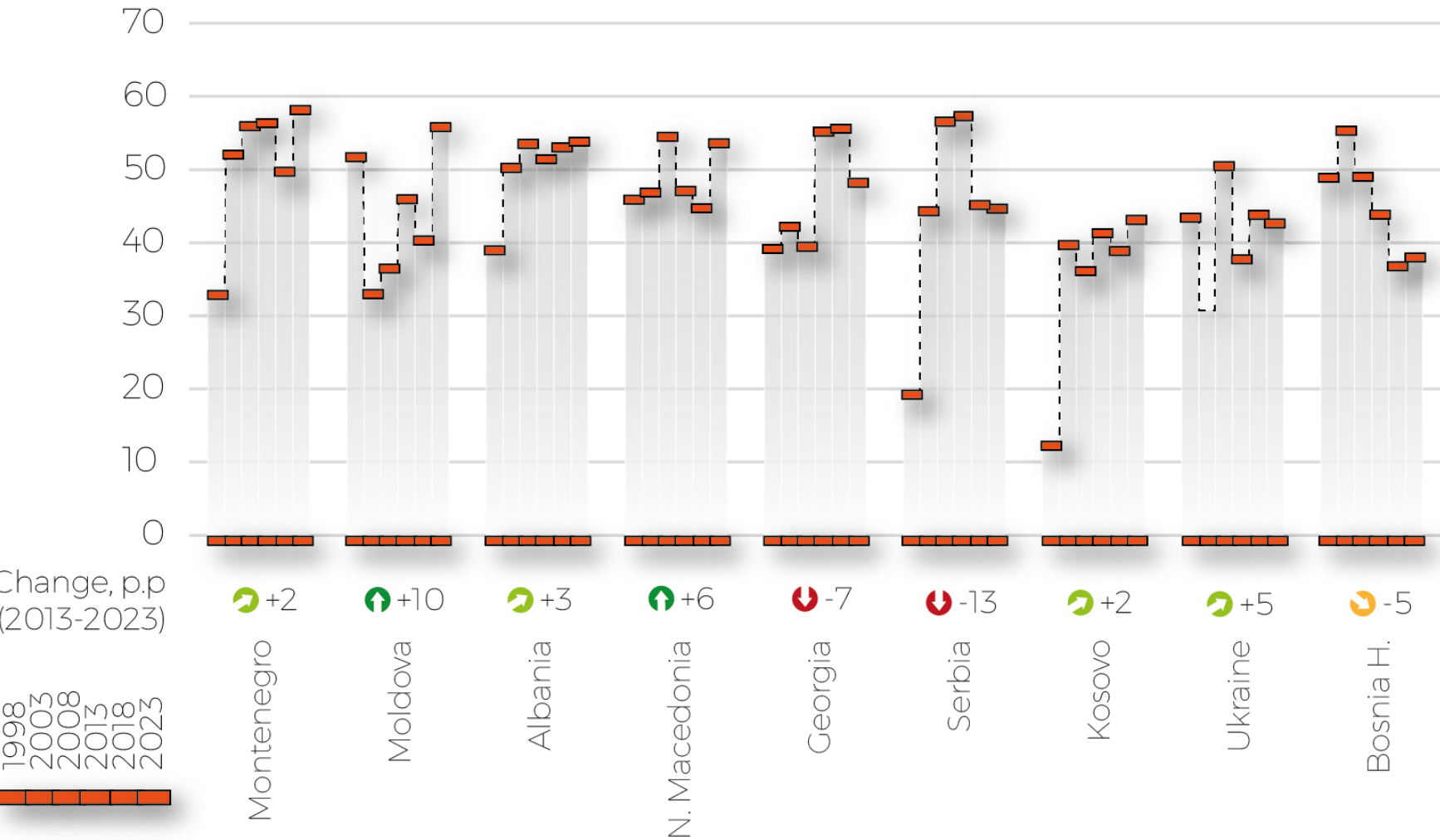


Freedom indices can vary considerably within certain countries due to territorial disputes and internal conflicts.

Authoritarian tendencies in the Western Balkans favour economic cooperation with partners who do not require reforms or adherence to rule of law and environmental standards associated with EU procurement law (Vulović 2023).

WB and EaP countries exhibit distinct positions and trends regarding the processes by which governments are selected, monitored, and replaced

Voice and accountability. Distance to the best performer country in the world (best=100%; lowest performer=0%)



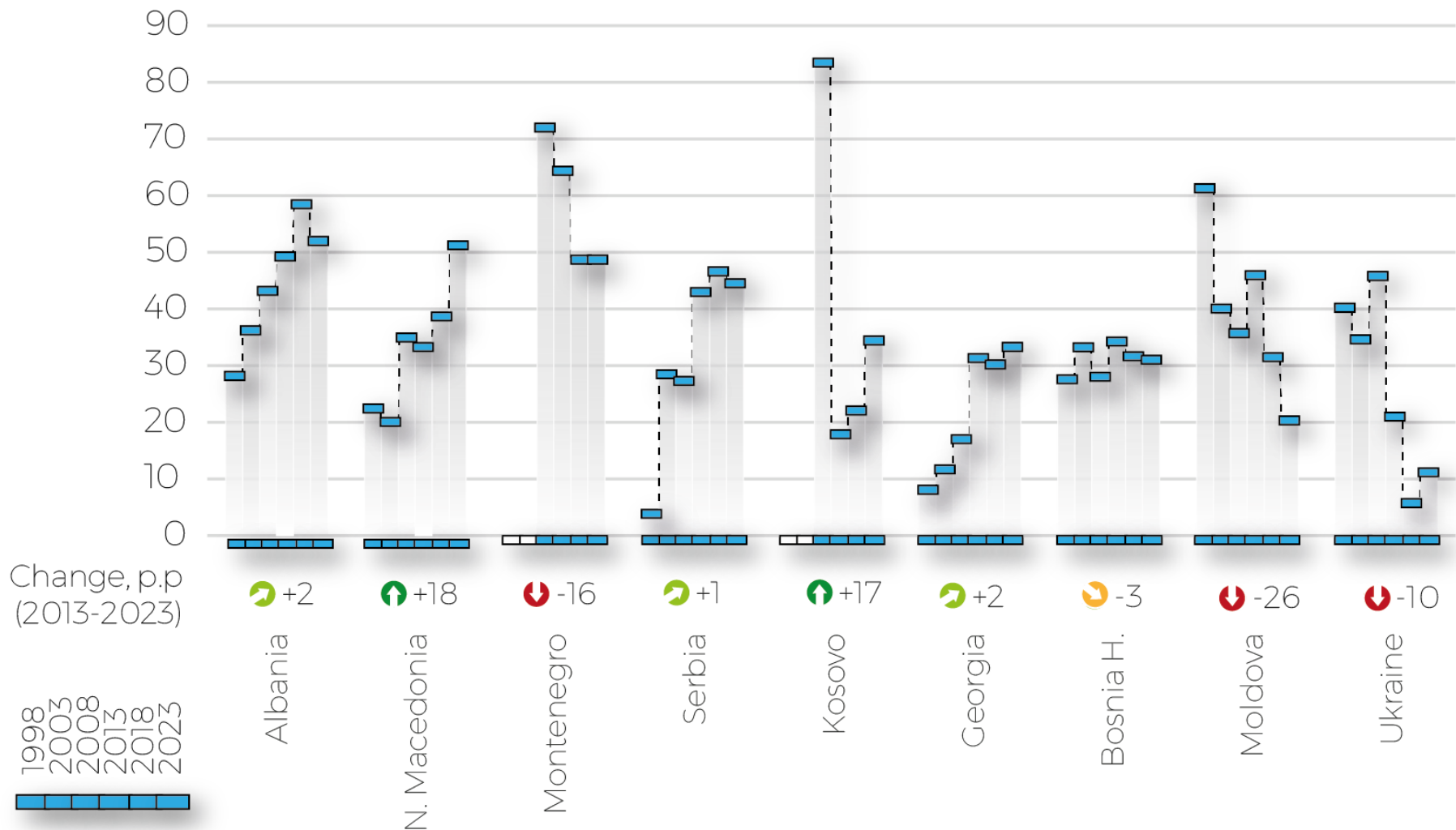
Voice and accountability captures perceptions of the extent to which a country's citizens are able to participate in selecting their government, as well as freedom of expression, freedom of association, and a free media. Serbia and Georgia have experienced major setbacks in terms of the process by which governments are selected, monitored, and replaced; while Moldova and Ukraine enhanced improved accountability despite instability and violence.

* The data do not include the assessment of the 2024 electoral process, including latest developments in Georgia and Moldova.

Source: World Bank. *The Worldwide Governance Indicators (WGI) describe broad patterns in perceptions of the quality of governance across countries and over time. The WGI are based on surveys of firms and households, and expert assessments produced by more than 30 think tanks, international organizations, nongovernmental organizations, and private firms around the world.

WB and EaP countries exhibit distinct positions and trends regarding political stability and absence of violence and terrorism

Political stability and Absence of Violence/Terrorism. Distance to the best performer country in the world (best=100%; lowest performer=0%)



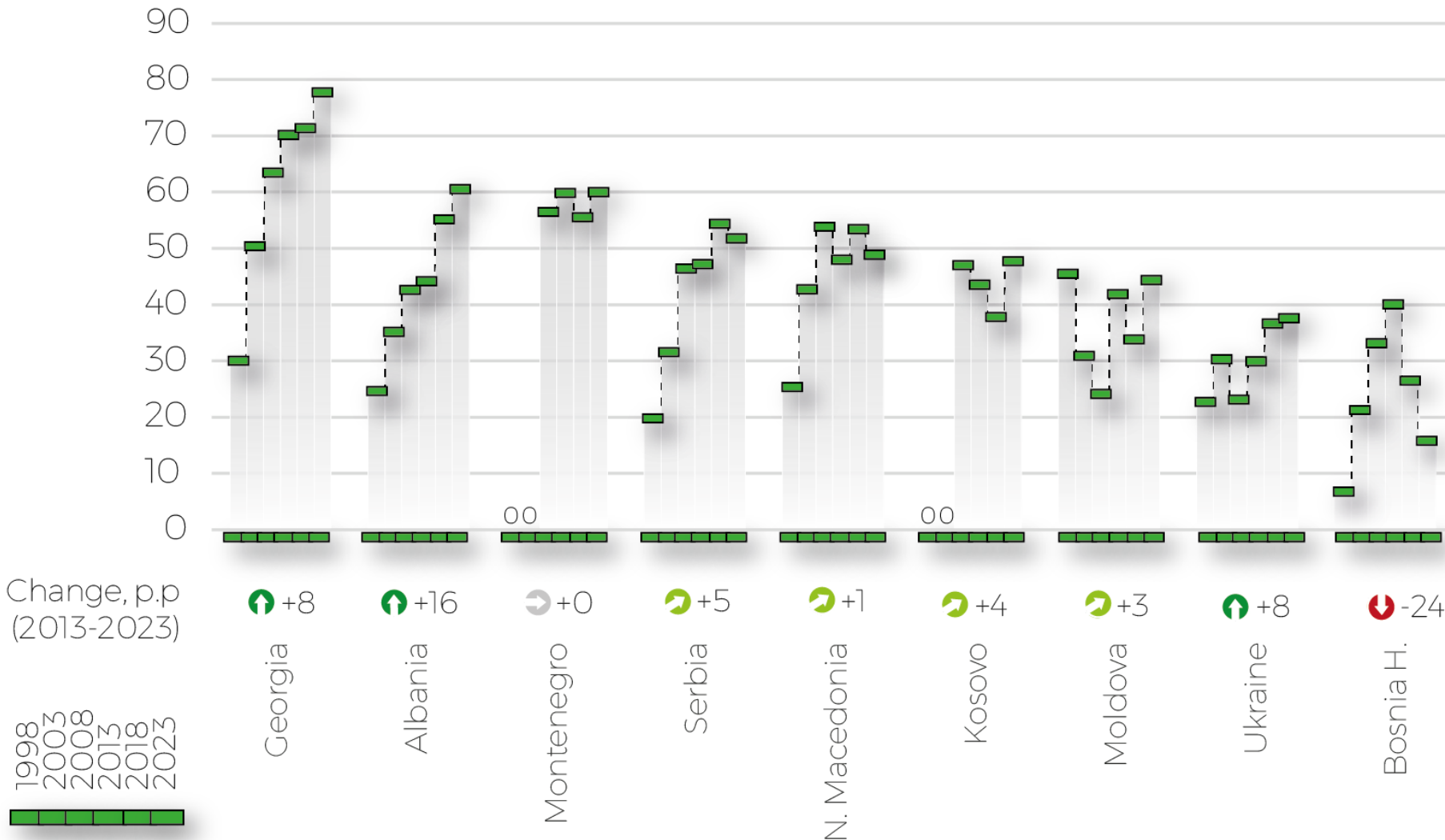
Political Stability and Absence of Violence/Terrorism measures perceptions of the likelihood of political instability and/or politically motivated violence, including terrorism.

North Macedonia and Kosovo have shown significant improvements in political stability and reduction in violence. Conversely, Moldova, Montenegro, and Ukraine have experienced notable declines in these areas over the past decade.

Source: World Bank. *The Worldwide Governance Indicators (WGI) describe broad patterns in perceptions of the quality of governance across countries and over time. The WGI are based on surveys of firms and households, and expert assessments produced by more than 30 think tanks, international organizations, nongovernmental organizations, and private firms around the world.

The capacity of the government to formulate and implement effective policies has improved in all countries, with the exception of Bosnia and Herzegovina

Government effectiveness. Distance to the best performer country in the world (best=100%; lowest performer=0%)



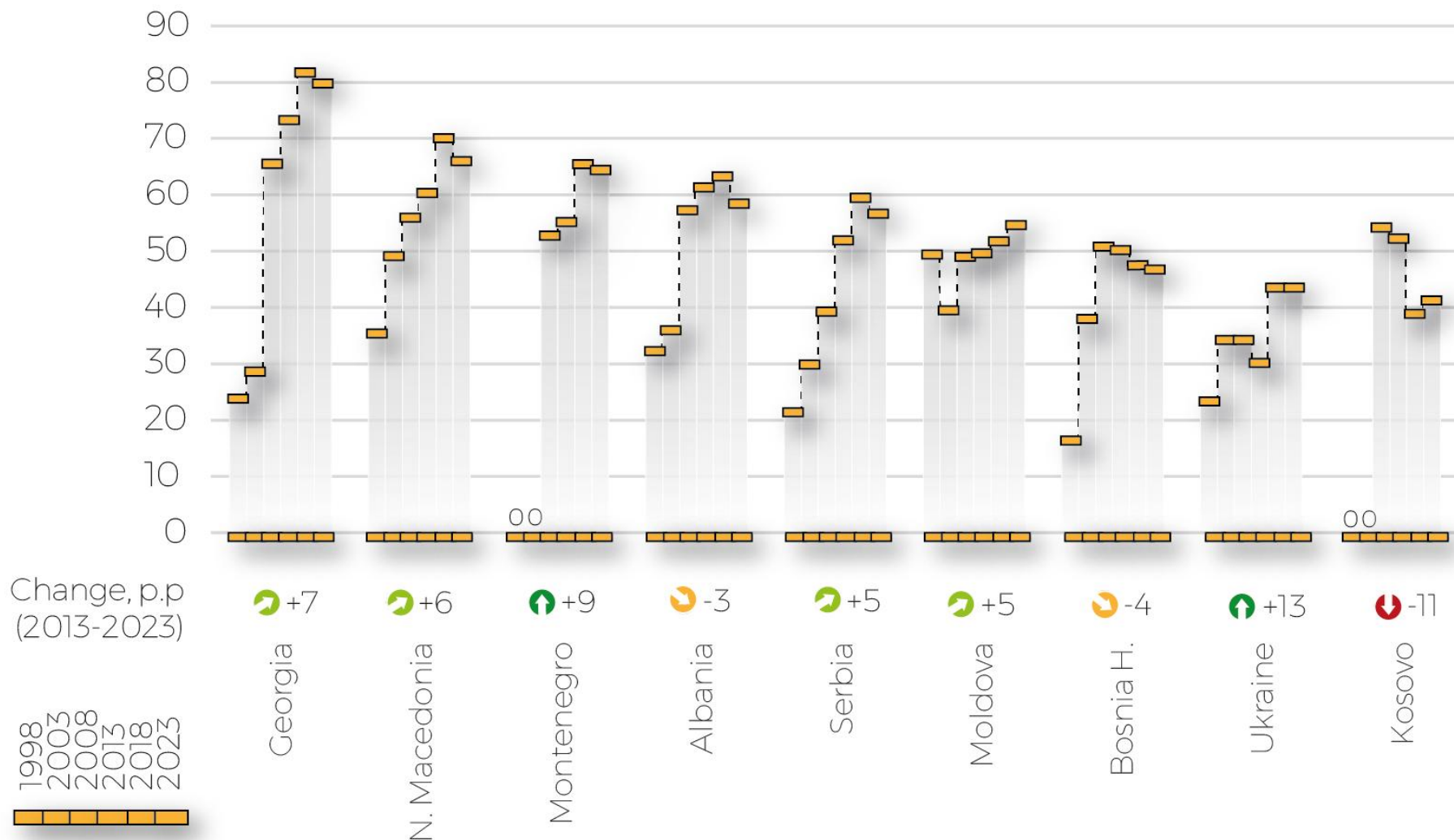
Government effectiveness captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies.

Bosnia and Herzegovina is the only candidate country where the perception of the quality of public services has significantly deteriorated.

Source: World Bank. *The Worldwide Governance Indicators (WGI) describe broad patterns in perceptions of the quality of governance across countries and over time. The WGI are based on surveys of firms and households, and expert assessments produced by more than 30 think tanks, international organizations, nongovernmental organizations, and private firms around the world.

There are significant differences in citizens' perceptions of their government's ability to formulate and implement sound policies and regulations

Regulatory quality. Distance to the best performer country in the world (best=100%; lowest performer=0%)



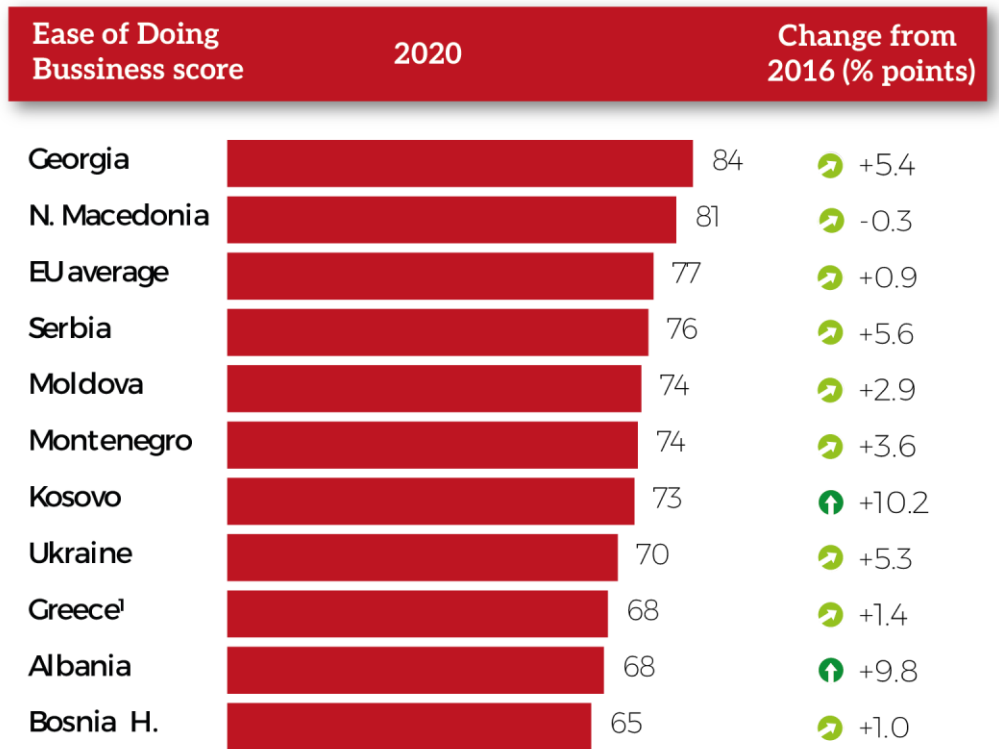
Regulatory quality captures perceptions of the ability of the government to formulate and implement sound policies and regulations that permit and promote private sector development.

Ukraine enhanced improved regulatory quality despite instability and violence. Conversely, Kosovo is the only country experiencing setbacks.

Source: World Bank. *The Worldwide Governance Indicators (WGI) describe broad patterns in perceptions of the quality of governance across countries and over time. The WGI are based on surveys of firms and households, and expert assessments produced by more than 30 think tanks, international organizations, nongovernmental organizations, and private firms around the world.

Most WB and EaP countries have improved their business environments to align more closely with the EU but are lagging in digitalization

Ease of Doing Business score. Index (best=100%; lowest performer=0%)



The ease of doing business score helps assess the absolute change in the economy’s regulatory environment over time as measured by Doing Business. Total score includes the following variables: Starting a Business, Dealing with Construction Permits, Getting Electricity, Registering Property, Getting Credit, Protecting Minority Investors, Paying Taxes, Trading across Borders, Enforcing Contracts and Resolving Insolvency.

Digital environment

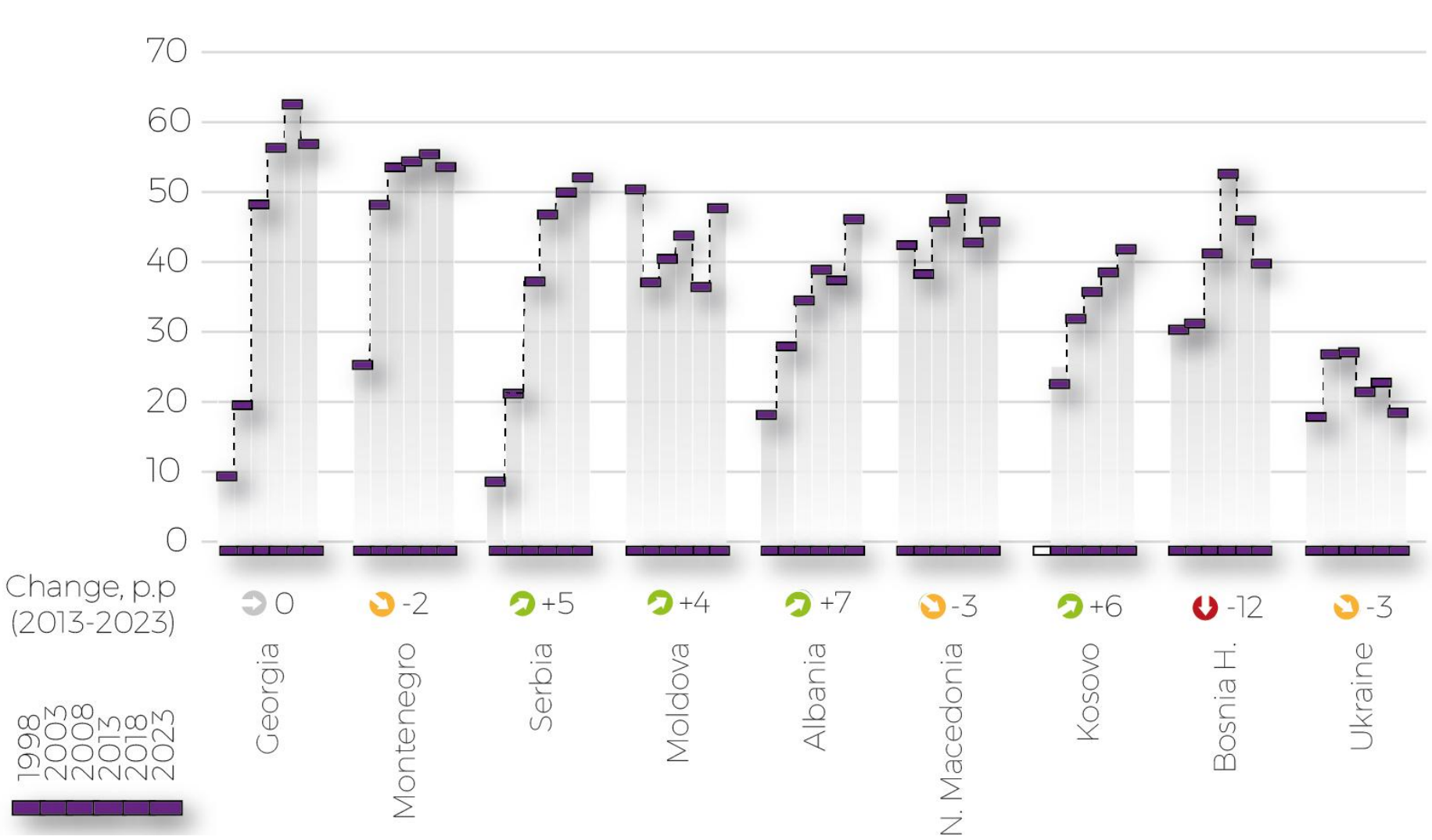
	2024 OECD Digital society Index (0-100)	2024 BBVA DIGIX Index (0-100)	2022 Digital Economy and Society Index (0-100)	2024 Global Innovation Index (ranking, 133 countries)
Serbia	72	56	35	52
Georgia		53		57
Moldova		50		68
Albania	72	48	30	84
Ukraine		45		60
Montenegro	50	62	35	65
Kosovo	50		26	
N. Macedonia	66	56	25	58
Bosnia H.	34		22	80
EU average			52	

OECD Digital society index measures: Access (broadband infrastructure, communications regulatory framework and data accessibility), Use (digital government, digital business, emerging digital technologies), Society (digital inclusion and green digital technologies), and Trust (privacy and personal data protection, consumer protection in e-commerce and cybersecurity). BBVA DiGiX uses 24 indicators included in the index are grouped in six dimensions that represent three broad pillars: supply conditions (infrastructure and costs), demand conditions (user, government and enterprise adoption), and institutional environment (regulation). Digital Economy and Society Index (DEGI) is based on four pillars: digitally skilled population and highly skilled digital professionals, secure and sustainable digital infrastructures, digital transformation of businesses and digitalization of public services. The Global Innovation Index (GII) ranks countries according to its inputs (institutions; human capital and research; infrastructure; market sophistication; business sophistication) and outputs (knowledge and technology outputs; creative outputs).

Source: Ease of doing business (World Bank), Western Balkans Competitiveness Outlook 2024 (OECD), BBVA, Digital Economy and Society Index (Regional Cooperation Council, funded by the EU), and The Global Innovation Index (World Intellectual Property Organization - United Nations).

Most countries, especially Georgia and Serbia, have significantly improved rule of law standards, while it remains notably weak in Ukraine

Rule of law. Distance to the best performer country in the world (best=100%; lowest performer=0%)



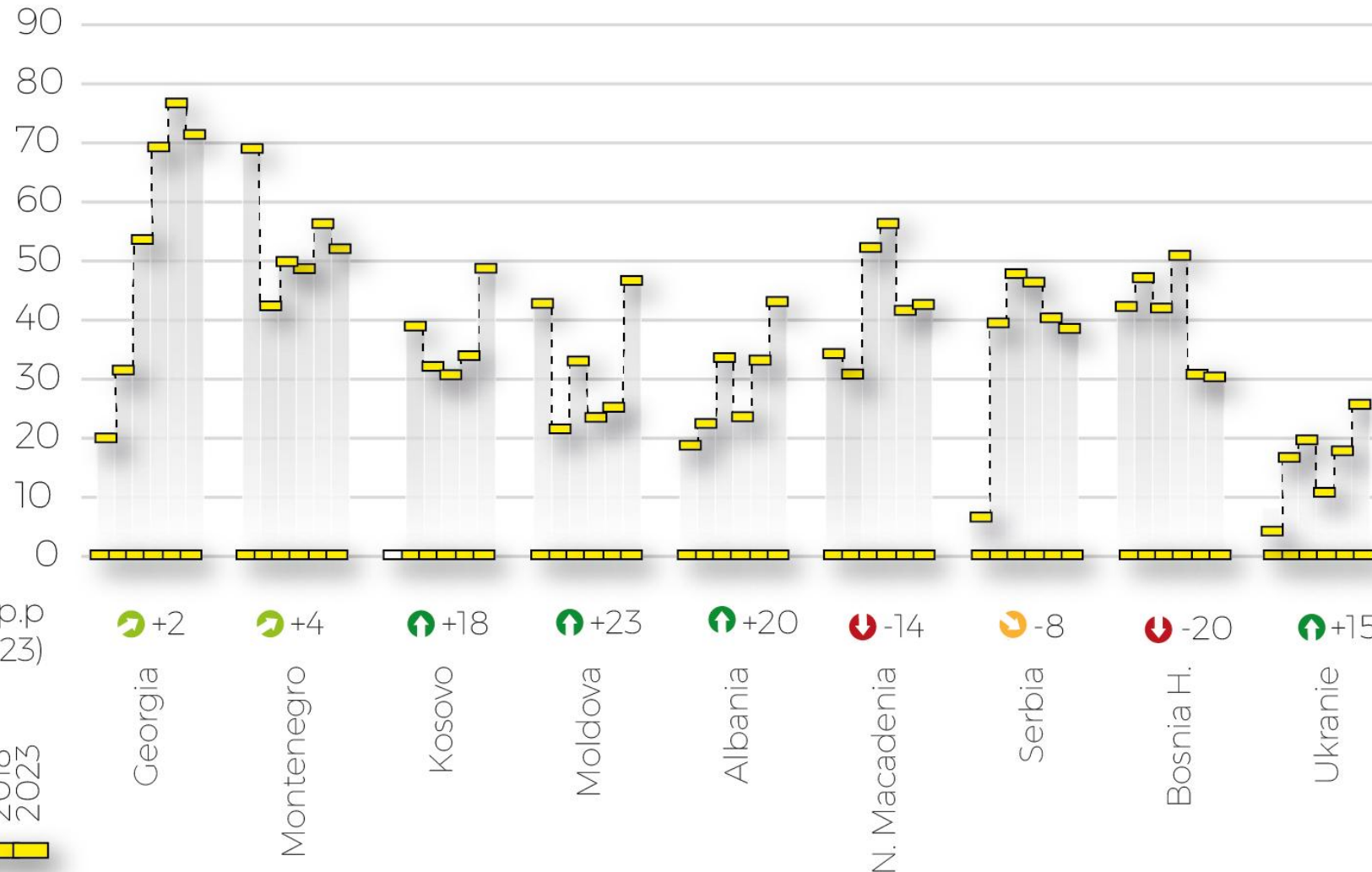
Rule of law captures perceptions of the extent to which agents have confidence in and abide by the rules of society, and in particular the quality of contract enforcement, property rights, the police, and the courts, as well as the likelihood of crime and violence.

Georgia demonstrates that a country can control corruption and improve the rule of law, although its progress has slowed down in the past decade.

Source: World Bank. *The Worldwide Governance Indicators (WGI) describe broad patterns in perceptions of the quality of governance across countries and over time. The WGI are based on surveys of firms and households, and expert assessments produced by more than 30 think tanks, international organizations, nongovernmental organizations, and private firms around the world.

Corruption control has improved in Moldova, Albania, Kosovo, and Ukraine but has worsened in Bosnia, North Macedonia, and Serbia

Control of corruption. Distance to the best performer country in the world (best=100%; lowest performer=0%)



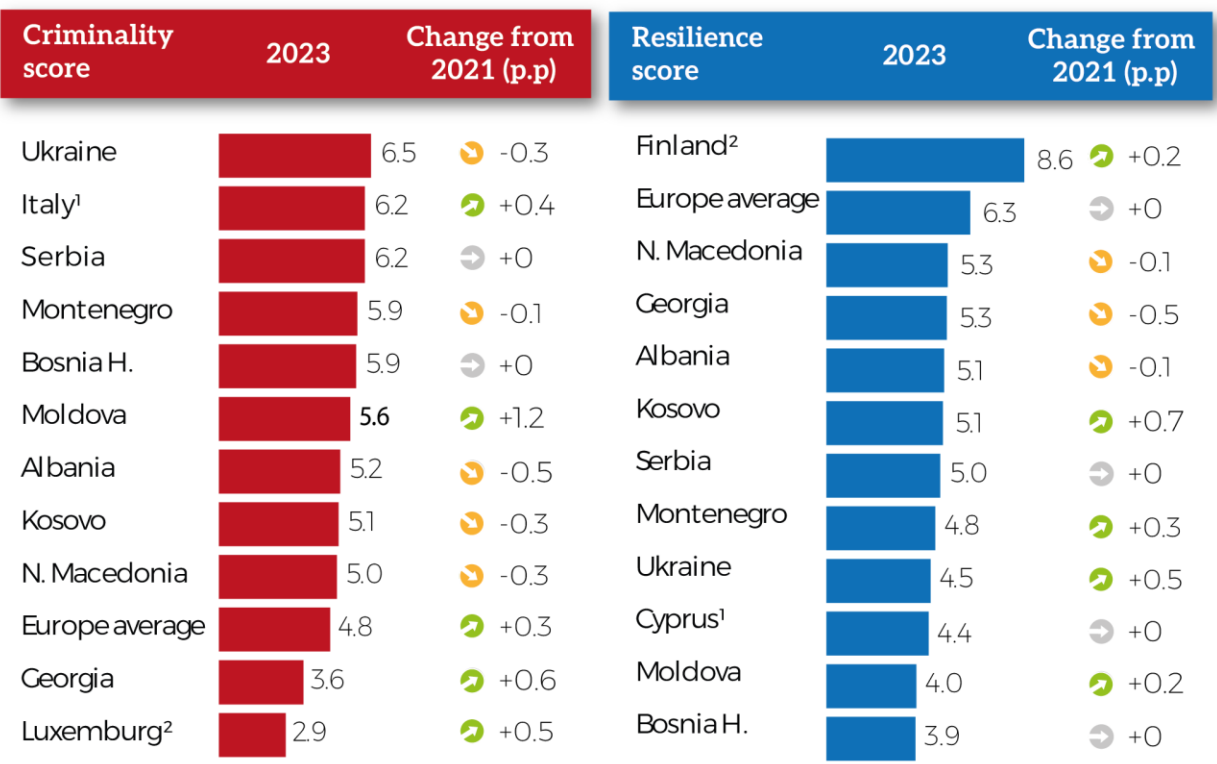
Control of corruption captures perceptions of the extent to which public power is exercised for private gain, including both petty and grand forms of corruption, as well as "capture" of the state by elites and private interests.

Georgia demonstrates that a country can control corruption and improve the rule of law, although its progress has slowed down in the past decade.

Source: World Bank. *The Worldwide Governance Indicators (WGI) describe broad patterns in perceptions of the quality of governance across countries and over time. The WGI are based on existing data sources produced by more than 30 think tanks, international organizations, nongovernmental organizations, and private firms around the world.

Several WB and EaP countries are very vulnerable to organized crime and political destabilization. However, sanctions do not always effectively address these issues

Global Organized Crime Index. Criminality and resilience score (1-10)

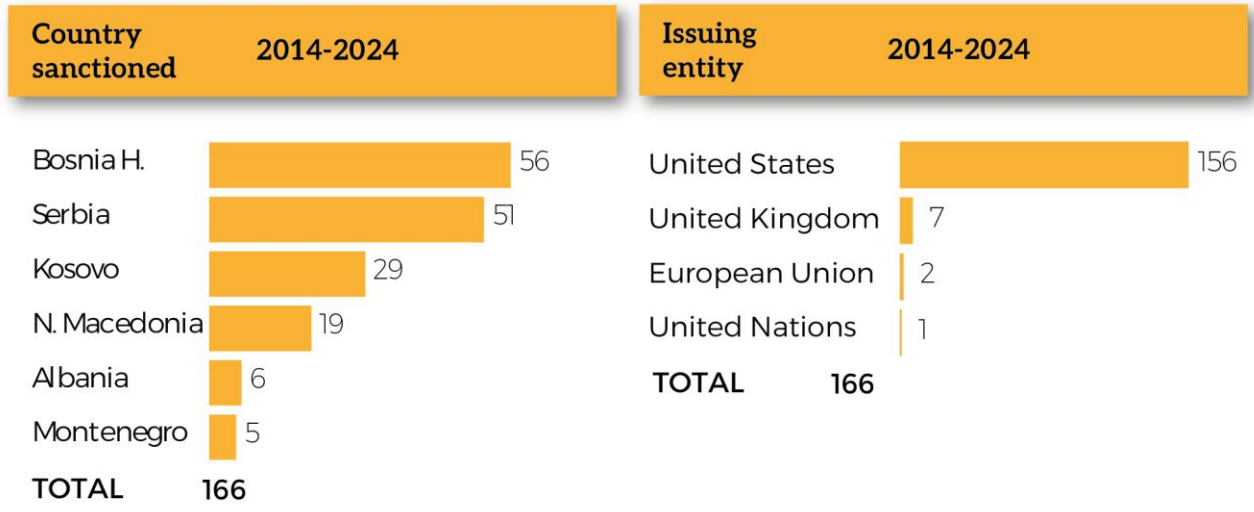


Note: 1. EU worse performer country; 2. EU top performer country.

Ukraine, Serbia, and Montenegro are among the top five European countries with the highest criminality scores.

Source: Global Organized Crime Index. The design of the Index allows not only for an assessment of the extent of criminal behaviour, but also an evaluation of where vulnerabilities lie.

Sanctions in the Western Balkans by country



Sanctions are being employed as a strategic tool to address emerging threats and continue to be an essential element of international policies focused on the Western Balkans. Bosnia and Herzegovina, along with Serbia, received the most designations amid allegations of corruption, organized crime, and political destabilization. In some countries, sanctions stigmatize individuals and force them into political isolation. In others, they are framed as Western interference, enabling sanctioned figures to gain prominence rather than being sidelined. In Serbia, for example, individuals under sanctions have been appointed to senior government roles (Scaturro and Mejdini 2024).

The end of the war in Ukraine could lead to a substantial outflow of weapons from the conflict zone to other countries

Potential future flows of weapons from Ukraine

Wars lead to the buildup of weapons, often beyond state control. When wars end, these weapons can flow illegally to criminals and insurgents both domestically and internationally.

Every precedent suggests that, if not addressed proactively, Ukraine's battlefields could become the new arsenal of anarchy, arming everyone from insurgents in Africa to gangsters in the streets of Europe (Galeotti and Arutunyan 2023).

Source: Galeotti and Arutunyan (2023). "Peace and Proliferation. The Russo-Ukrainian War and the Illegal Arms Trade".



3. Economic drivers and trends

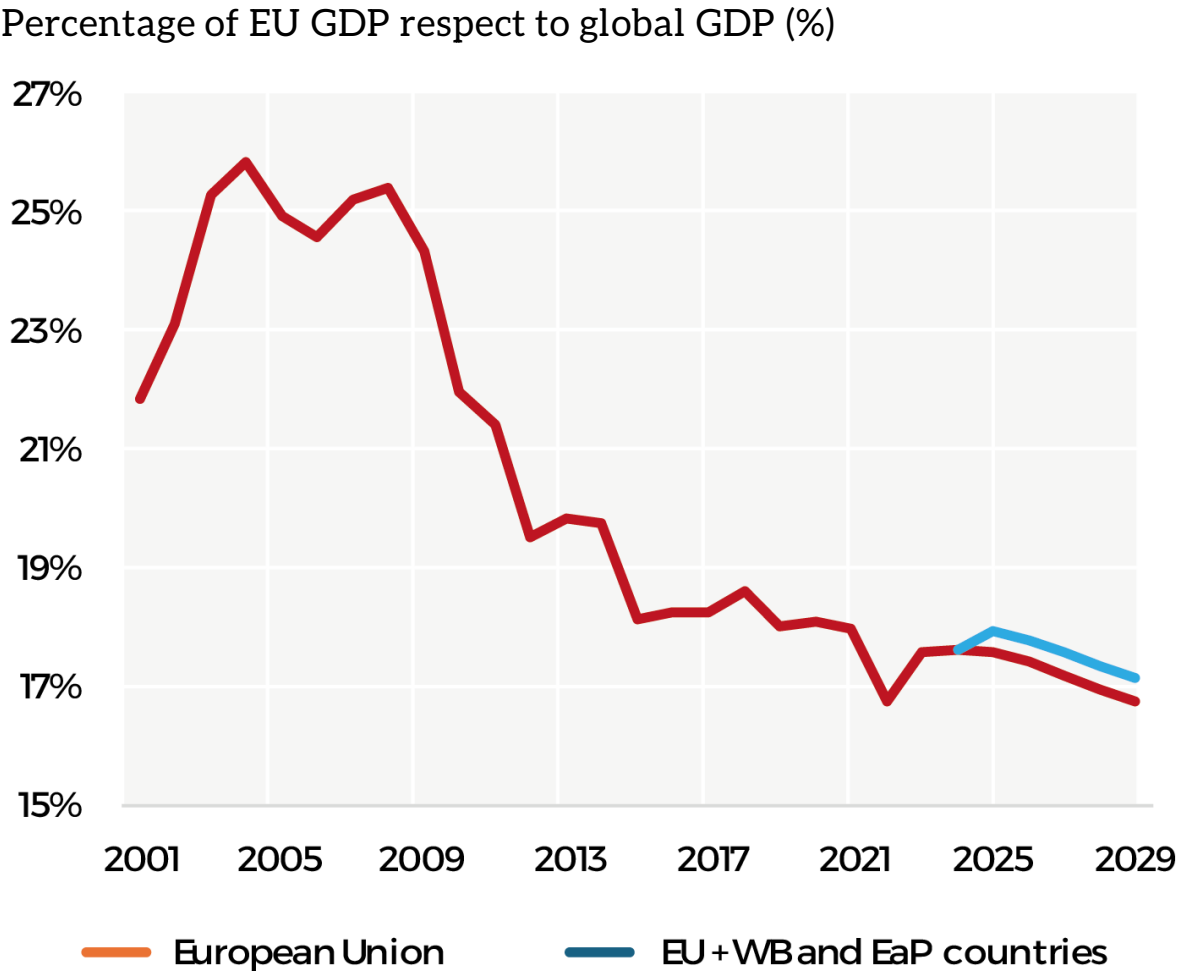
Key drivers and trends

1. The EU will keep on losing global economic clout in the foreseeable future, and WB and EaP candidate countries will not significantly impact EU growth.
2. WB and EaP countries are more dependent on agriculture, fossil fuels and minerals than EU countries.
3. Ukraine's accession to the EU could have a significant impact on EU agricultural markets.
4. Ukraine could become the first recipient of CAP payments, ahead of France. Though, estimating the impact of enlargement on CAP payments remains challenging.
5. WB and EaP income gaps relative to the EU are significant, and a very slow convergence is forecasted ahead.
6. New EU members could hoard more than 15% of cohesion funds, with Ukraine among the top-5 recipients.
7. The aggregate impact of enlargement on the EU budget would exceed the sum of CAP payments and cohesion funds allocated to WB and EaP countries.
8. Income gaps could be significantly narrow after EU accession.
9. Structural reforms are key for convergence.
10. Regional business executives consider involuntary migration and economic issues top concerns for the next two years. Armed conflict is considered a top risk in Georgia, Ukraine, and Bosnia.

Key drivers and trends

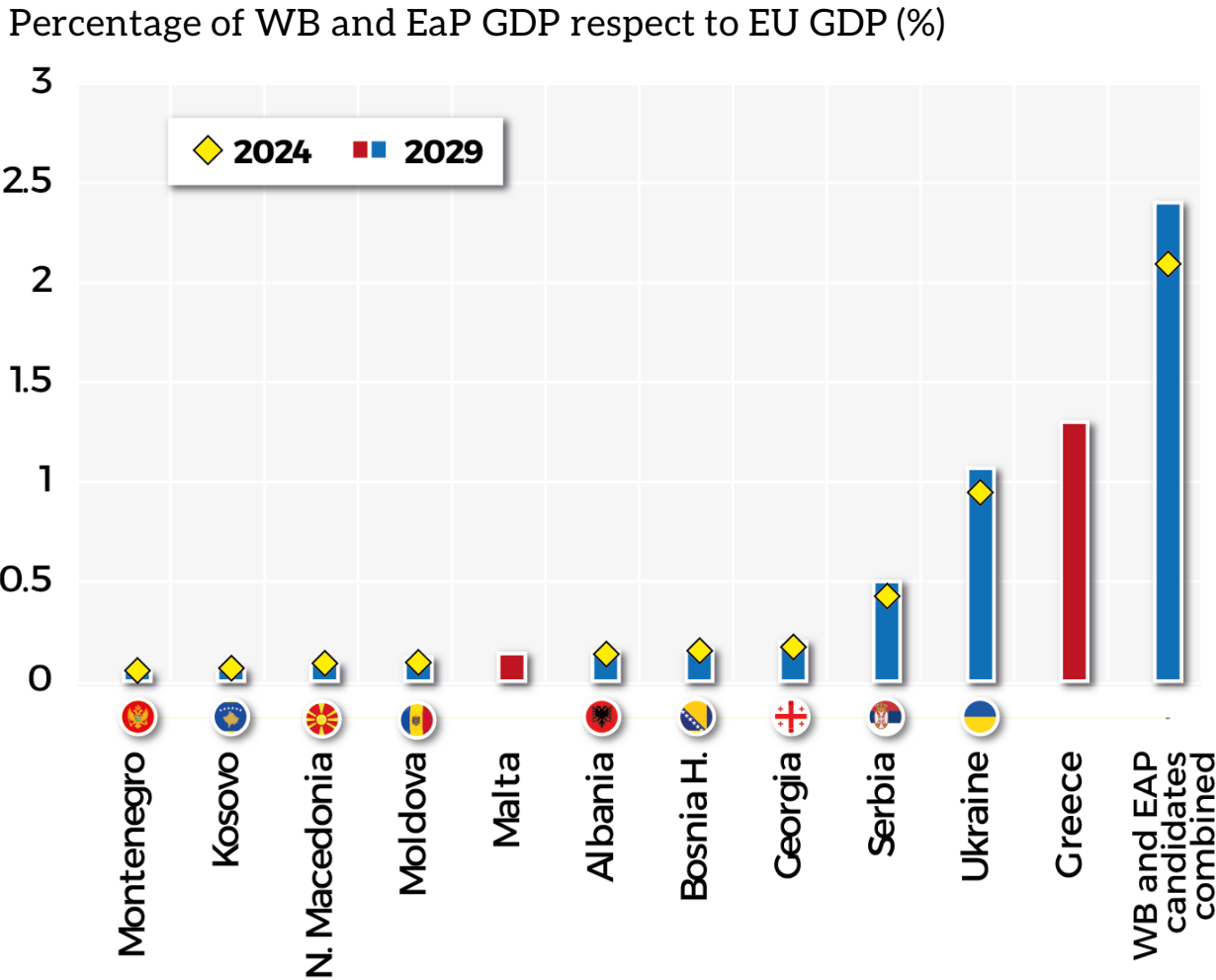
11. Most WB and EaP countries have high youth unemployment rates and low female labor force participation rates compared to EU standards.
12. There is a remarkable gap in terms of labor productivity between WB and EaP countries and the EU.
13. The EU is the main trading partner for the WB and EaP countries, with the exception of Georgia.
14. Trade in services is increasing, although starting from a very low base.
15. The EU is a key player in FDI flows to WB and EAP, but there is growing Chinese investment footprint in Serbia.
16. FDI is important for growth in several countries, but non-EU investment could have unintended consequences for recipient countries.
17. Most candidate countries will meet EU debt and deficit criteria by the end of the decade.

The EU will keep on losing global economic clout in the foreseeable future, and WB and EaP candidate countries will not significantly impact EU growth



Candidate countries economic weight in aggregate terms is not significant respect to the EU, and it will remain limited.

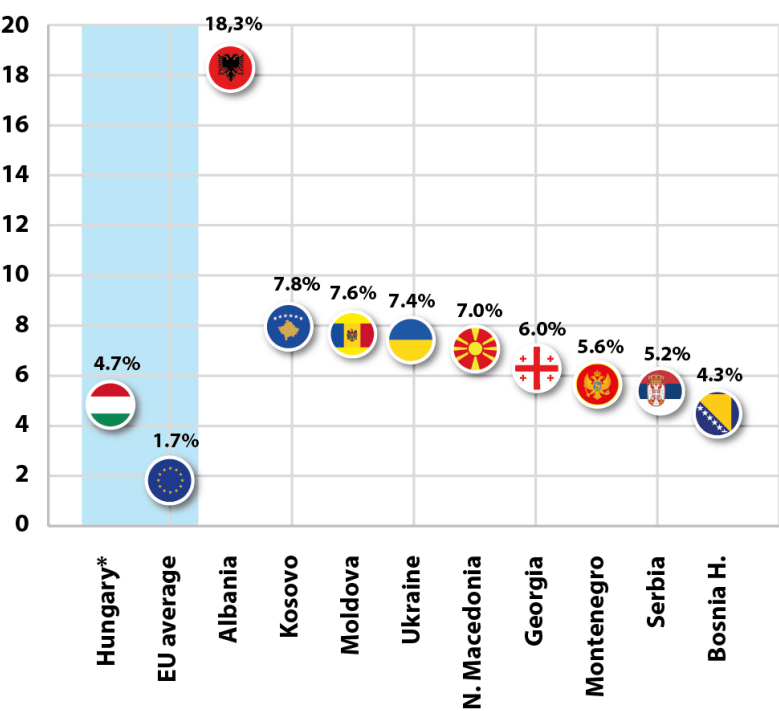
Source: CIDOB based on data from the IMF World Economic Outlook.



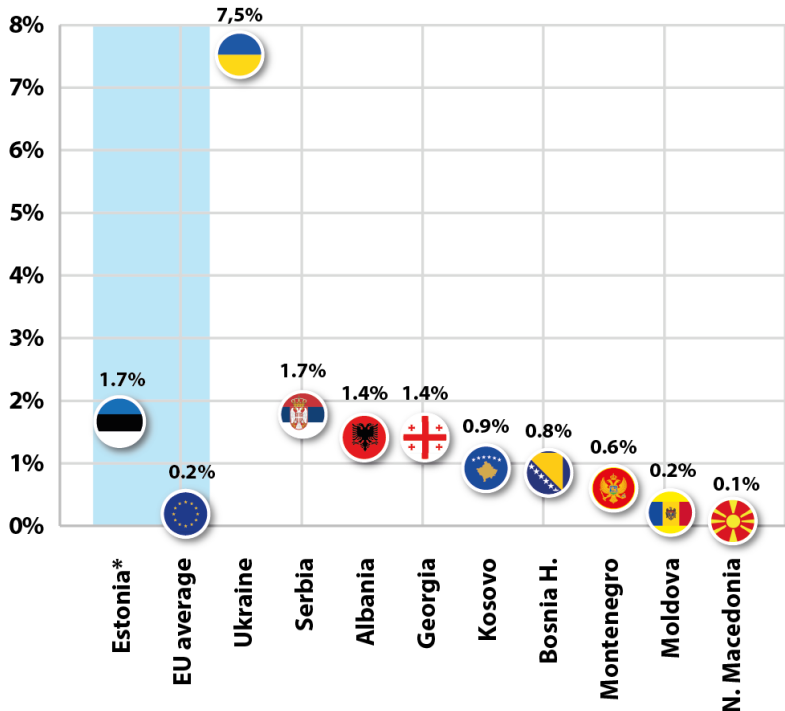
If all Western Balkan and EaP candidate countries joined the EU, the EU GDP would increase by 2% to 2.5%.

WB and EaP countries are more dependent on agriculture, fossil fuels and minerals than EU countries

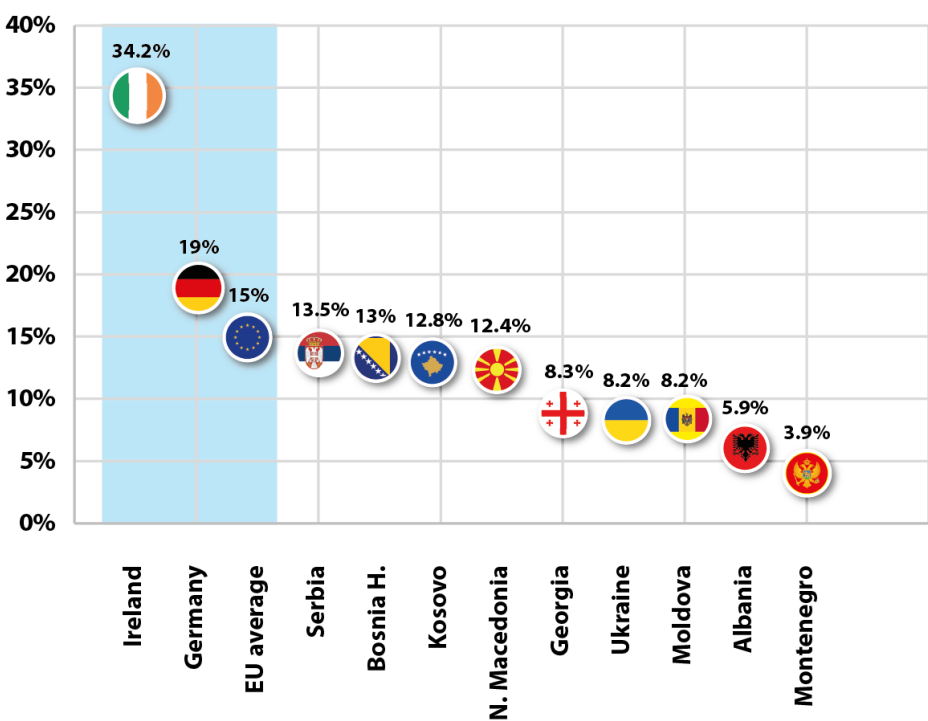
Agriculture, forestry, and fish.
Percentage of GDP (% , 2023)



Total natural resources rents*.
Percentage of GDP (% , 2023)



Manufacturing, value added. Percentage
of GDP (% , 2021)



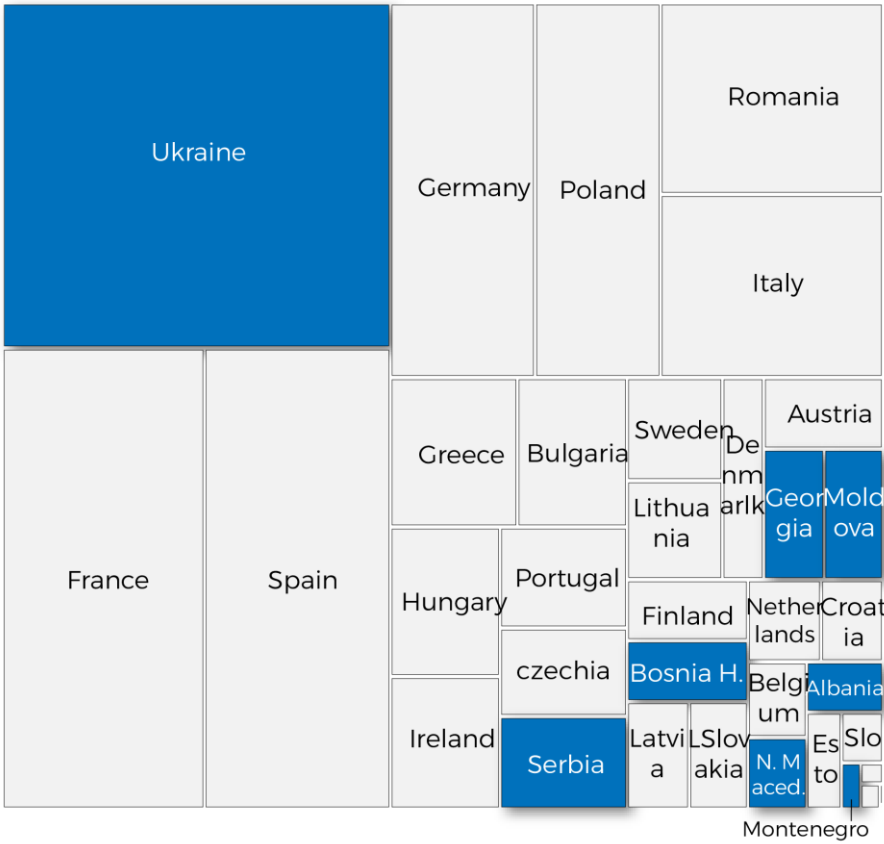
*EU country with higher
agricultural value added (Hungary).

* EU country with higher total natural
resources rents (Estonia). Total natural
resources rents are the sum of oil rents,
natural gas rents, coal rents (hard and
soft), mineral rents, and forest rents.

Source: CIDOB based on data from the IMF
World Economic Outlook.

Ukraine's accession to the EU could have a significant impact on EU agricultural markets

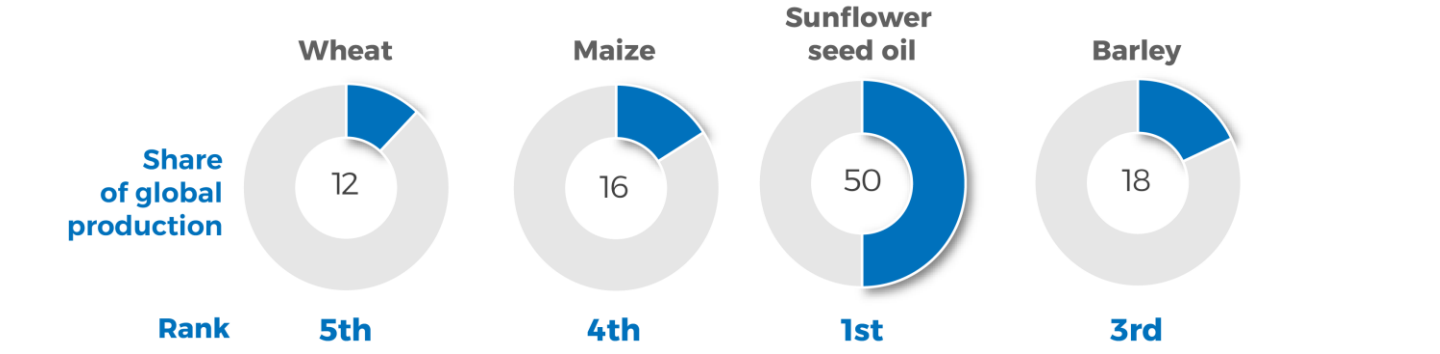
WB and EaP countries would increase the EU's arable land by one-third. Agricultural land in 2021 (sq. km)



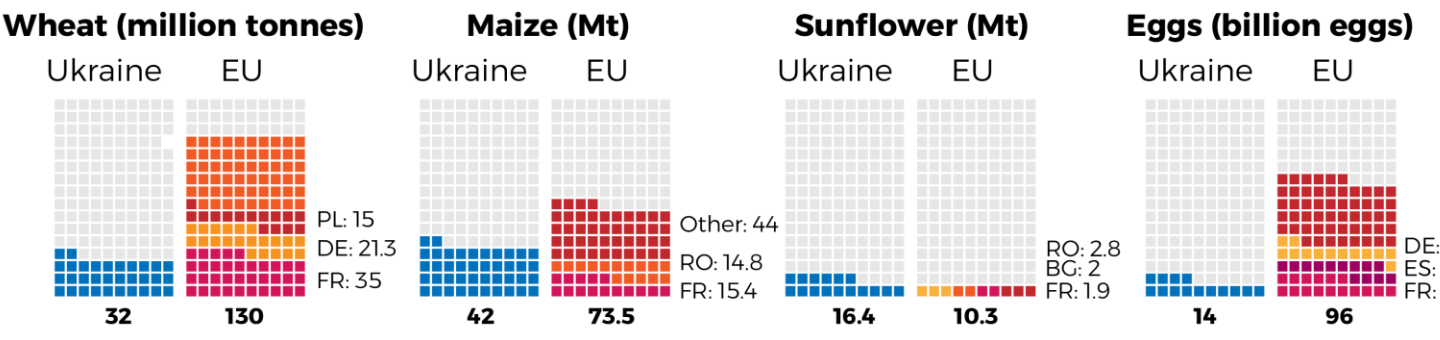
Ukraine is a global agricultural powerhouse. Upon accession, it would become the most important agricultural country in the EU, accounting for 20% of the EU's arable land.

Source: CIDOB based on data from the World Bank.

Ukraine is a major exporter of cereals and oilseeds. Ukraine's share of global agricultural exports and rank in the world before the Russian invasion (2022)



Comparison of Ukrainian and EU production of selected agricultural products (2024)



Historically, agricultural policy has been one of the most contentious elements in EU enlargement negotiations, especially when it involved big agricultural producers. Farmers in existing Member States fear the potential competition for markets and subsidies from their newer counterparts. (Albaladejo Román 2024).

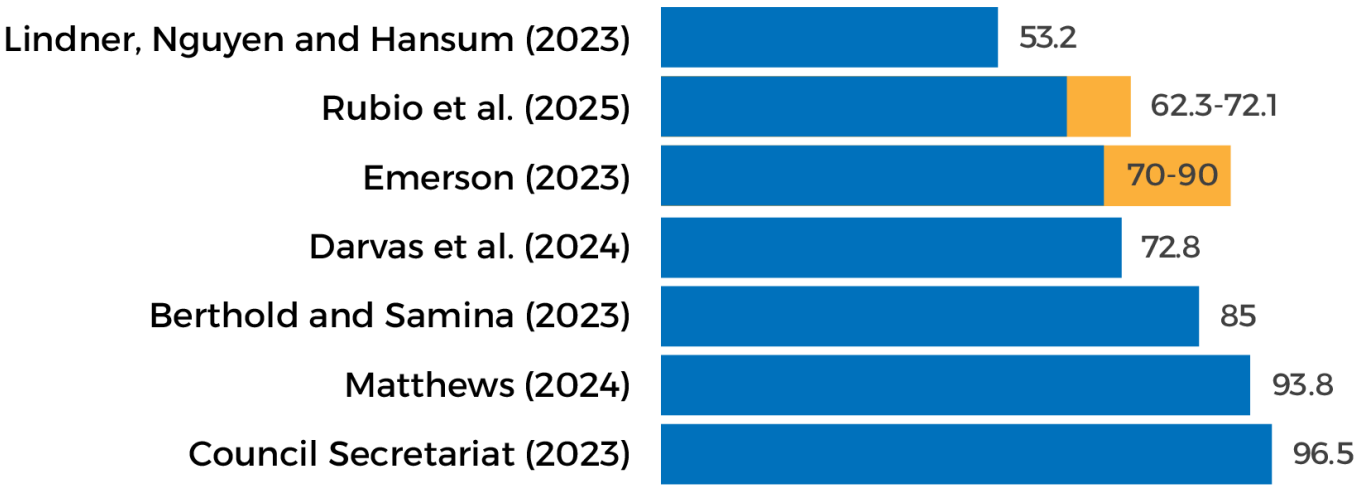
Source: European Parliament Research Service based on State Statistics Service of Ukraine, Eurostat and Infographic - How the Russian invasion of Ukraine has further aggravated the global food crisis, Council of the EU, 2022.

Ukraine could become the first recipient of CAP payments, ahead of France. Though, estimating the impact of enlargement on CAP payments remains challenging

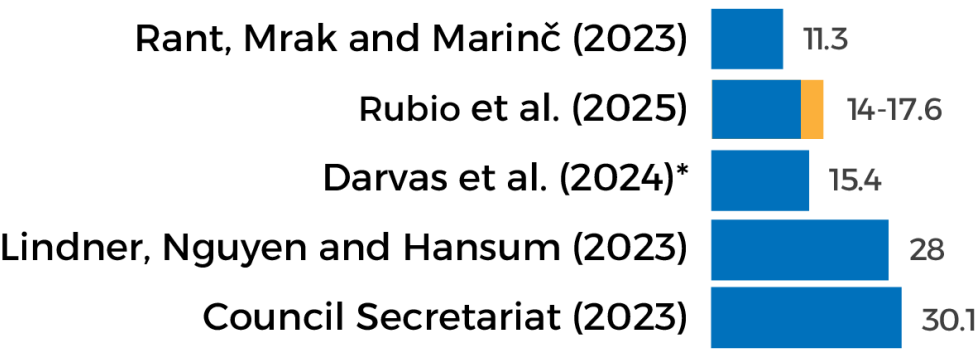
Common Agriculture Payments (CAP) in the next Multiannual Financial Framework. Billion euros

CAP commitments in MFF 2021-2027
375.34 EUR billion

CAP PAYMENTS TO UKRAINE (billion euros)



CAP PAYMENTS TO WB (billion euros)



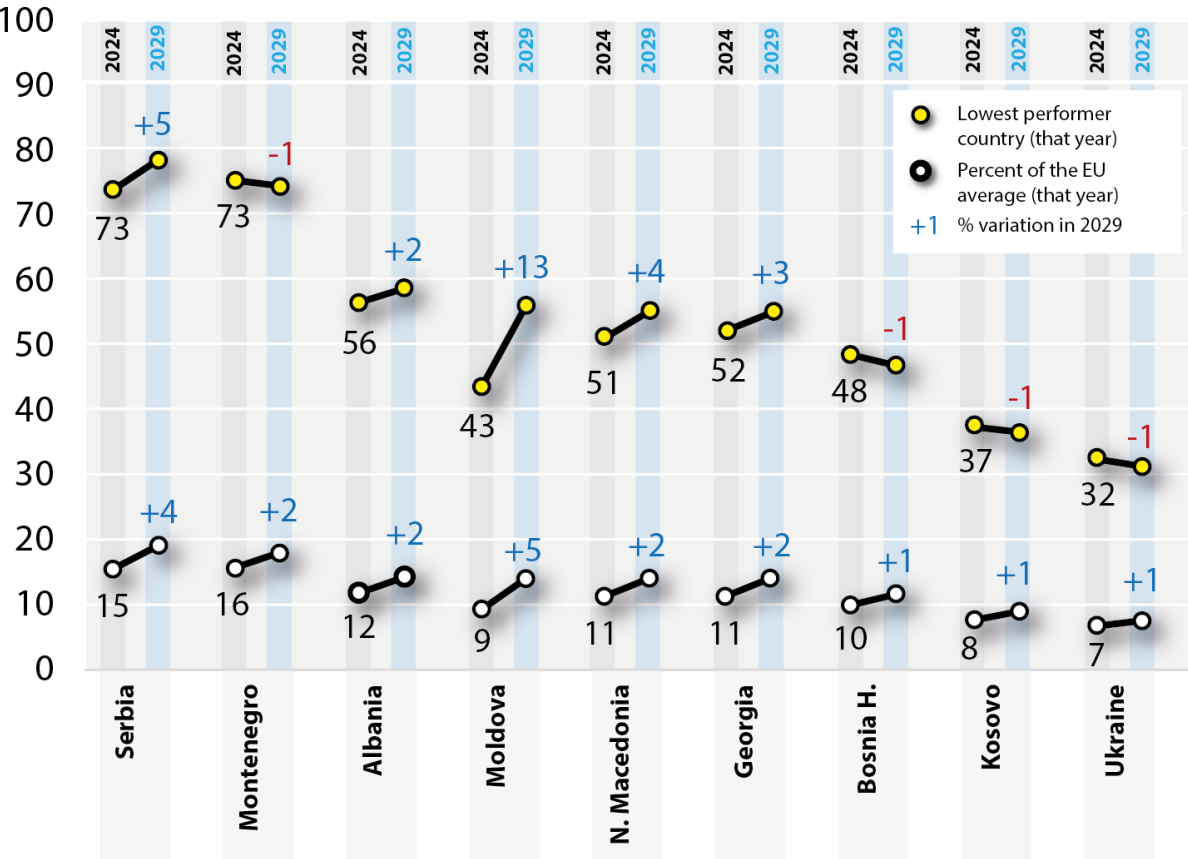
* It includes Georgia and Moldova. We subtract Ukraine payments calculated by the same author (see Darvas et al (2023)).

Estimations differ depending on critical assumptions, including whether Ukrainian territorial integrity will be restored, cap scenarios, and future decisions by EU leaders. Typically, they do not account for what national budgets would gain from enlargement. Upper ceiling and CAP 1 budget in real terms are critical. If no upper ceiling is set, the total CAP budget could increase by 22–25%, but if CAP1 budget is maintained, all current Member States would have to accept a reduction in their CAP allocation by 15% on average (Rubio et al. 2025). Historically, successive EU enlargements were preceded by CAP reforms, and exigent accession compromises from candidate countries (Albaladejo Román 2024). Unlike for Ukraine, for WB and other EaP countries, CAP would play a lesser role and cohesion policy would be the largest budgetary additional expenditure for the EU (Lindner, Nguyen, and Hansum 2023).

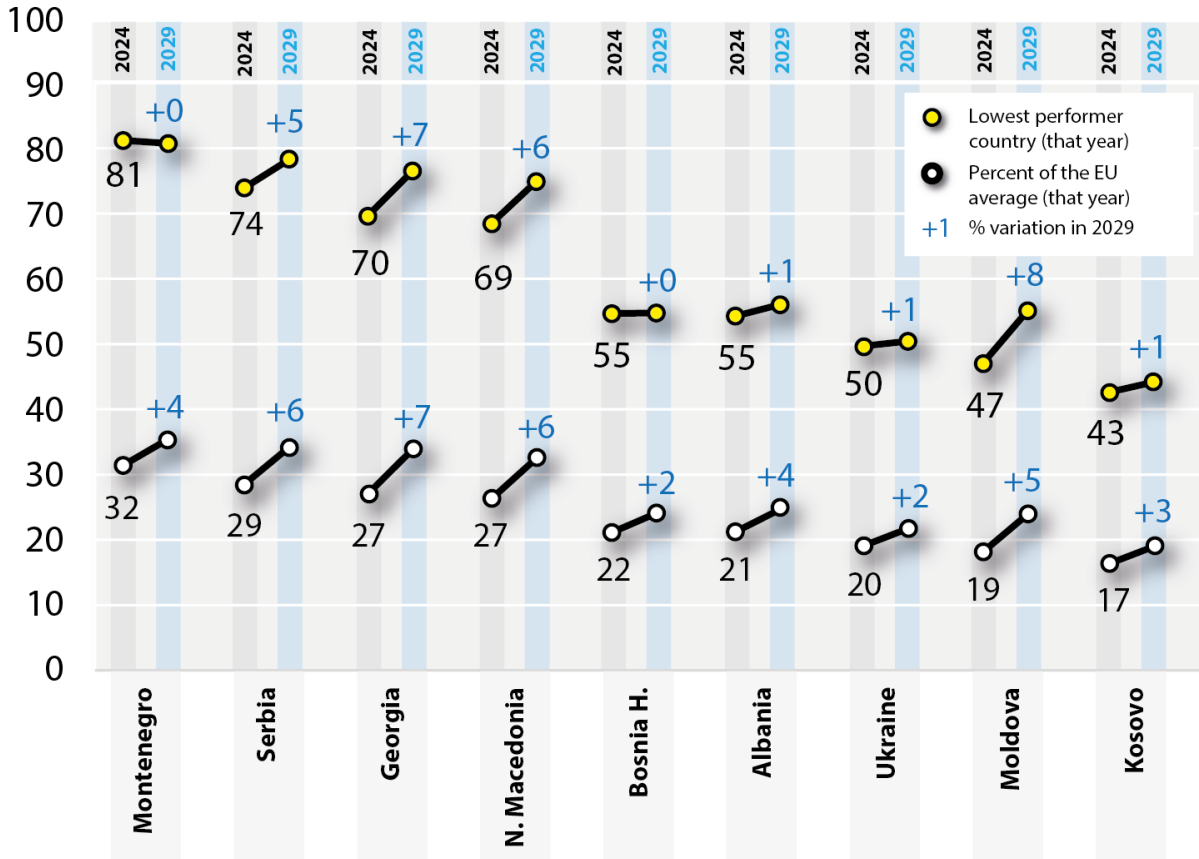
Note: The estimation ranges are displayed in yellow.

WB and EaP income gaps relative to the EU are significant, and a very slow convergence is forecasted ahead

Gross domestic product per capita, current prices. Distance to the lowest UE performer country and to EU average (% , 2024 & 2029)



Gross domestic product per capita, constant prices, Purchasing power parity. Distance to the lowest UE performer country and to EU average (% , 2017 international dollar)



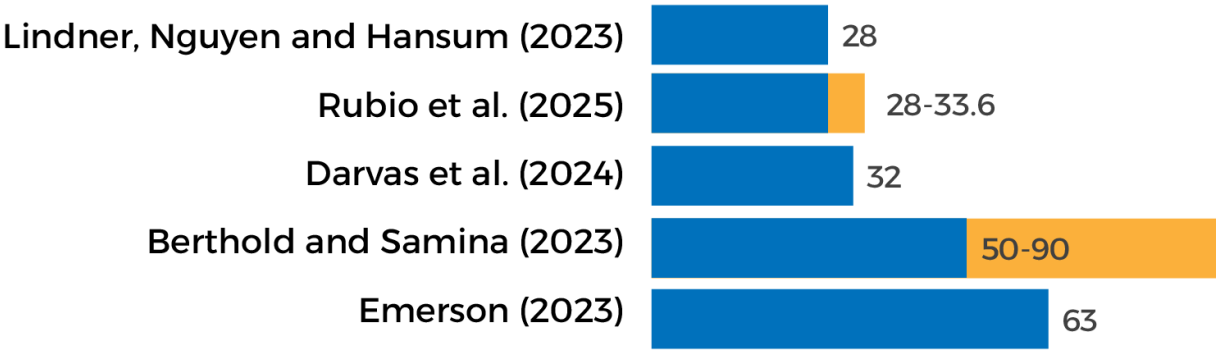
The remaining income per-capita gap with higher-income EU member states may be one of the reasons for the reservations of some EU governments against fast enlargement. It will mean higher transfers from the EU budget and stronger incentives for mass intra-EU movement of the labour force (Dabrowski and Léry Moffat 2024).

New EU members could hoard more than 15% of cohesion funds, with Ukraine among the top-5 recipients

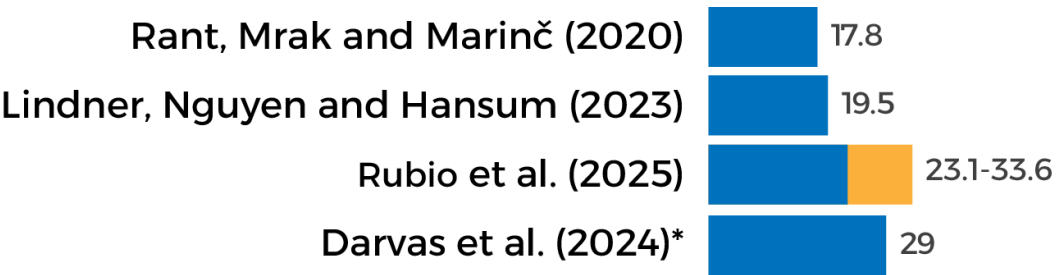
Cohesion funds payments in the next Multiannual Financial Framework. Billion euros

Cohesion commitments in MFF 2021-2027
353.5 EUR billion

COHESION PAYMENTS TO UKRAINE (billion euros)



COHESION PAYMENTS TO WB (billion euros)



* It includes Georgia and Moldova. We subtract Ukraine payments calculated by the same author (see Darvas et al (2023)).

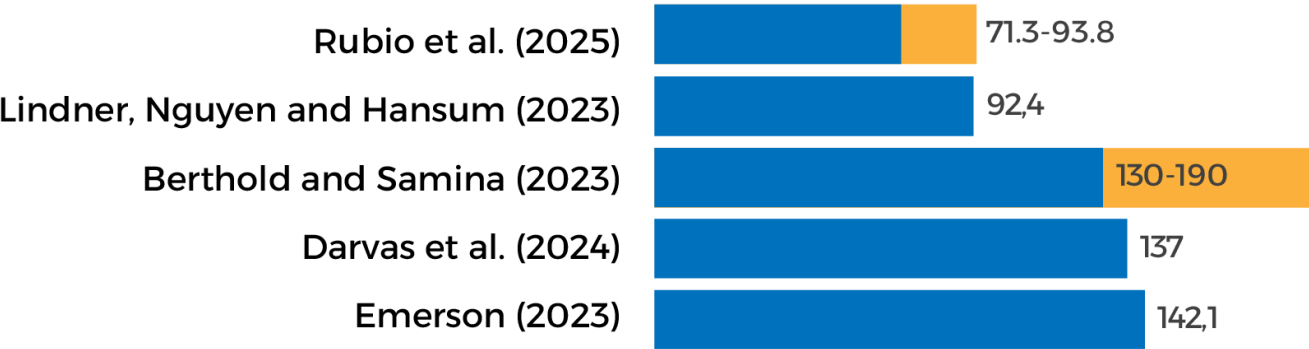
New EU memberships will lower the average GNI per capita, causing some EU 'less developed regions' to become 'transition regions', and some 'transition regions' to become 'more developed regions', resulting in reduced cohesion funding. Darvas et al. (2024) estimates a reduction close to 20% for Italy, Portugal and Malta, and higher than 10% for Hungary, Spain and Finland; whereas Rubio et al. (2025) estimates that fifteen Member States could see their Cohesion Policy allocation being reduced by 24% following enlargement.

Note: The estimation ranges are displayed in yellow.

The aggregate impact of enlargement on the EU budget would exceed the sum of CAP payments and cohesion funds allocated to WB and EaP countries

Total annual additional spending in the MFF in the next Multiannual Financial Framework. Billion euros

ANNUAL ADDITIONAL SPENDING DUE TO UKRAINE (billion euros)

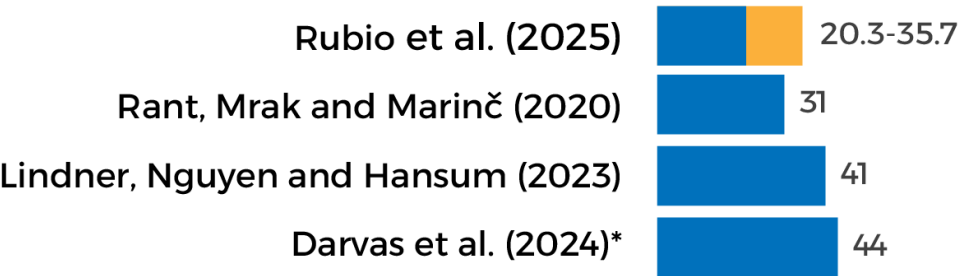


The estimations do not include potential military spending and the reconstruction of the country after the war. The World Bank (2024) estimates that aid for the recovery and reconstruction needs of Ukraine could amount to another 453 billion Euros.

According to a study for the European Parliament (Rubio et al. 2025), it would plainly be unrealistic for the EU budget to cover more than a minor share of Ukraine reconstruction costs and it is unclear whether the EU's future financial support would be best provided through the MFF, off-budget instruments linked to the EU budget (like the MFA+ loans) or an entirely off-budget mechanism based on an intergovernmental agreement (similar to the European Peace Facility or the European Stability Mechanism). There is no consensus on whether member states' status would change from being net recipients to net contributors after enlargement. Most estimations do not account for the fiscal and other benefits that EU27 countries would obtain after enlargement.

Total commitments in MFF 2021-2027
1,211 EUR billion

ANNUAL ADDITIONAL SPENDING DUE TO WB (billion euros)

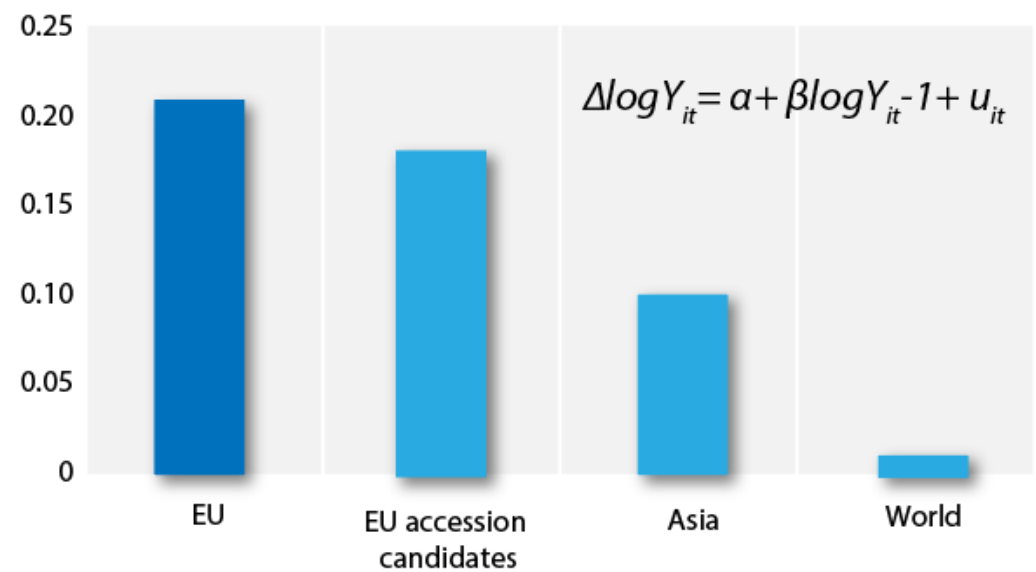


* It includes Georgia and Moldova. We subtract Ukraine payments calculated by the same author (see Darvas et al. 2023).

Note: The estimation ranges are displayed in yellow.

Income gaps could be significantly narrow after EU accession

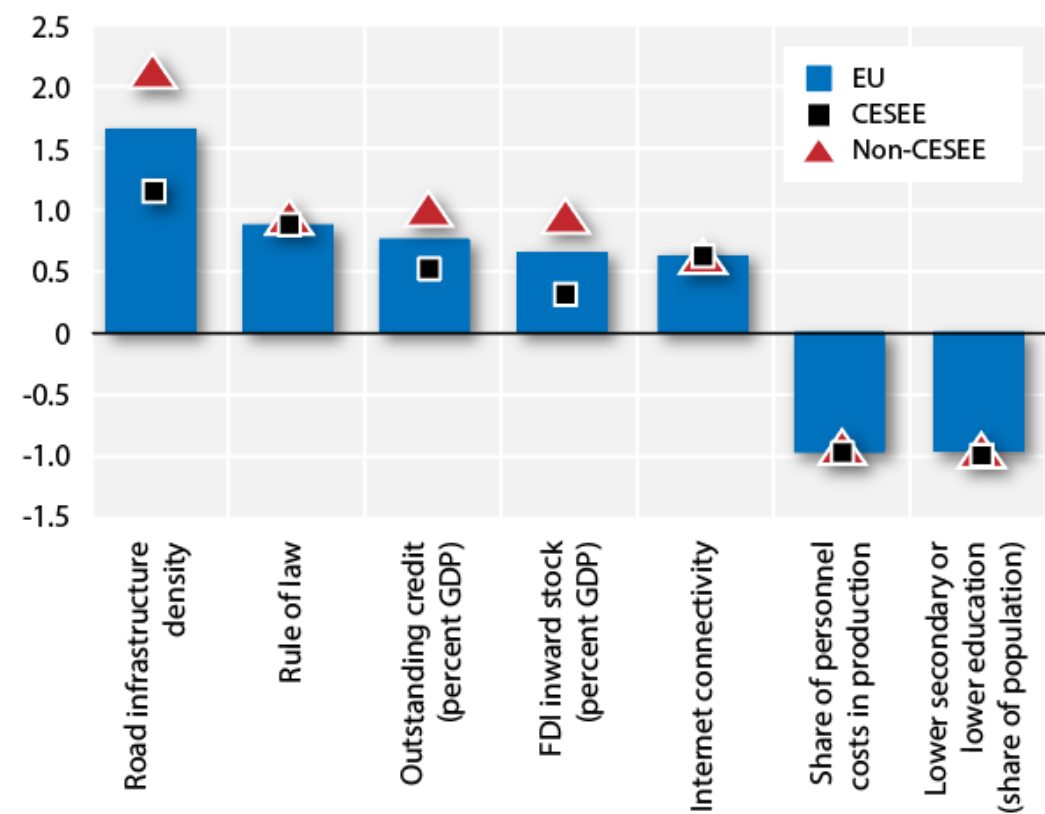
The EU has seen strong convergence effects over the past 30 years. Per capita convergence across regions (1995-2024). Beta: coefficient



Periods following EU enlargement led to sizable increases in EU per capita GDP. IMF estimates gains at more than 30 percent and 10 percent in new and old member states, respectively, after 15 years.

Source: October 2024 Regional Economic Outlook: Europe.

The main channels have been productivity catch-up and capital deepening often through foreign direct investment. Determinants of integration in EU value chains by EU countries (%)

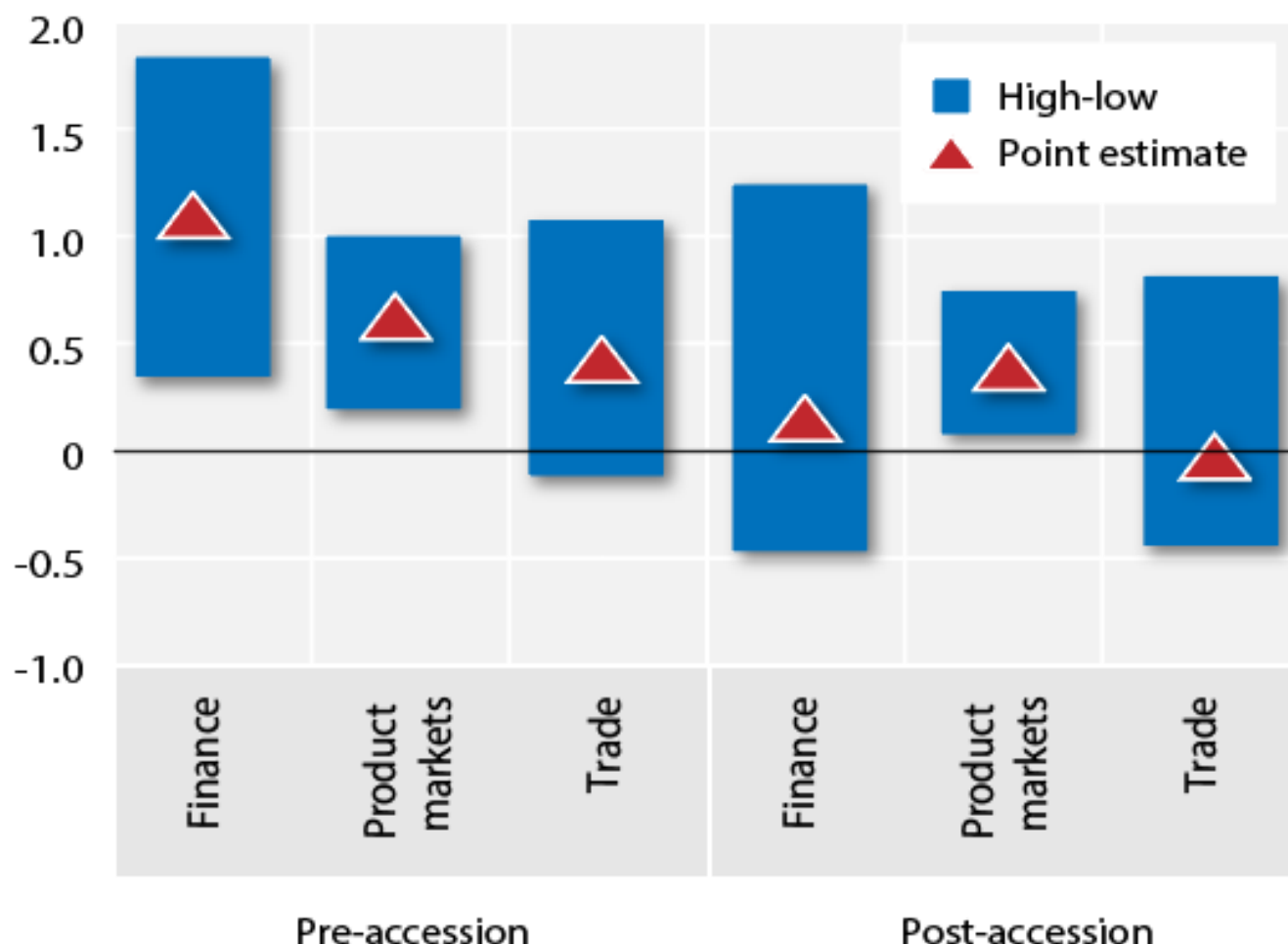


Note: CESEE (Central, eastern and south-eastern European countries).

Both country-specific factors (infrastructure) and EU-wide drivers (depth of capital markets) matter for integration.

Structural reforms are key for convergence

The pace of reforms slow after accession. Index



According to the IMF, in the 10 years' pre-accession, progress in Central, Eastern, and Southeastern Europe (CESEE) countries was significantly faster than the world average in the areas of domestic finance, external finance, product markets, and trade.

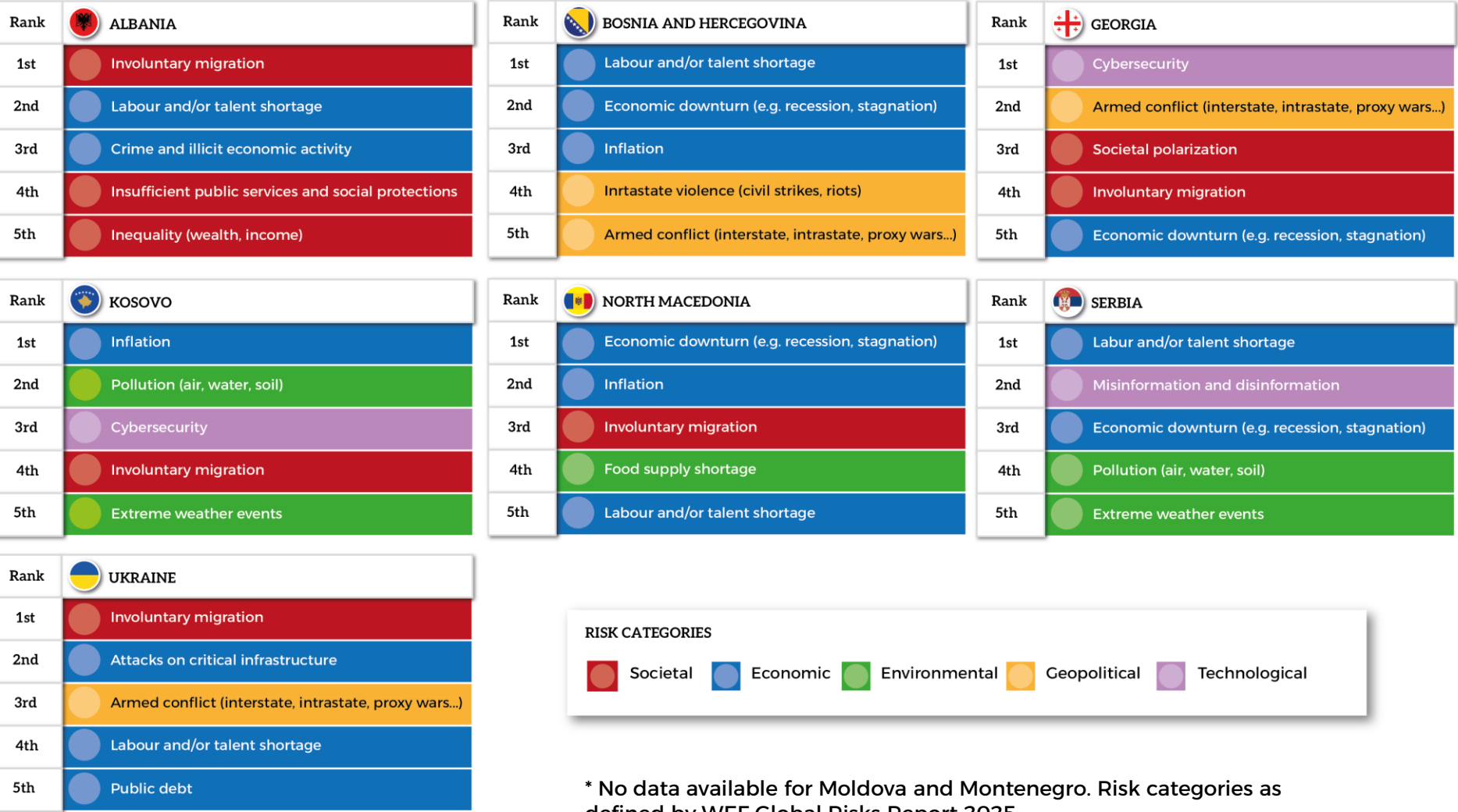
However, in the 10 years' post-accession, only product market reforms continued at a pace significantly faster than the world average.

More generally, and affecting all member states, financial integration slowed, reflecting a retrenchment in cross-border exposures following the global financial crisis while progress on the EU's capital market and banking union has been slow for years due to various impasses at the EU level.

Source: October 2024 Regional Economic Outlook: Europe.

Regional business executives consider involuntary migration and economic issues top concerns for the next two years. Armed conflict is considered a top risk in Georgia, Ukraine, and Bosnia

Top five risks identified by the Global Risks Report 2025 Executive Opinion Survey (EOS)



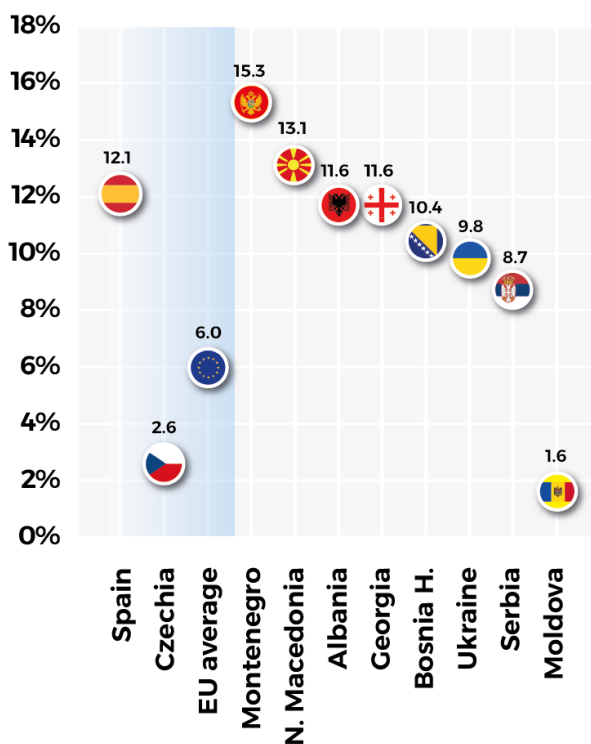
Respondents in each country were presented with the following question: “Which five risks are the most likely to pose the biggest threat to your country in the next two years?”

Source: World Economic Forum Global Risks Report 2025 .

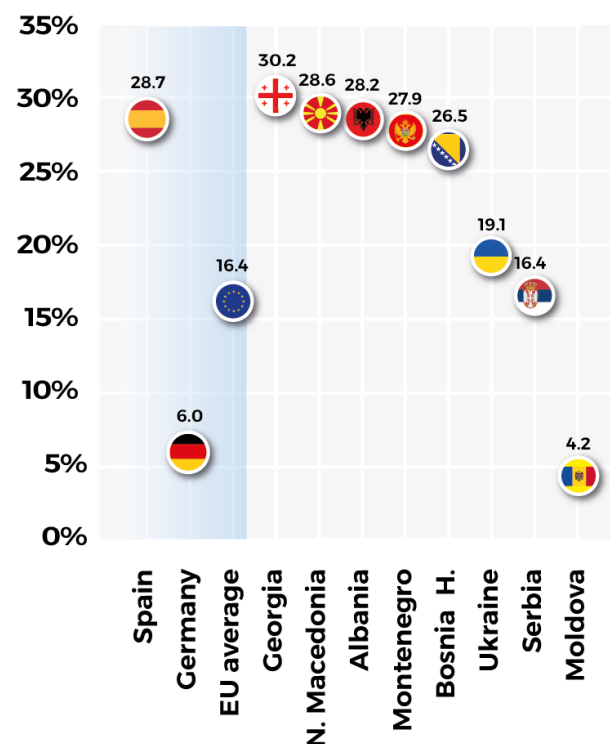
* No data available for Moldova and Montenegro. Risk categories as defined by WEF Global Risks Report 2025.

Most WB and EaP countries have high youth unemployment rates and low female labor force participation rates compared to EU standards

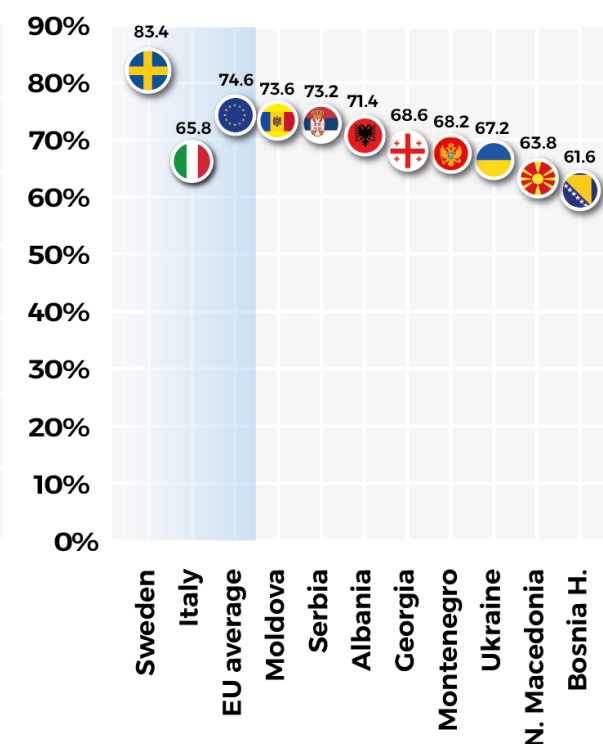
Unemployment rates. (% of total labor force, 2023)



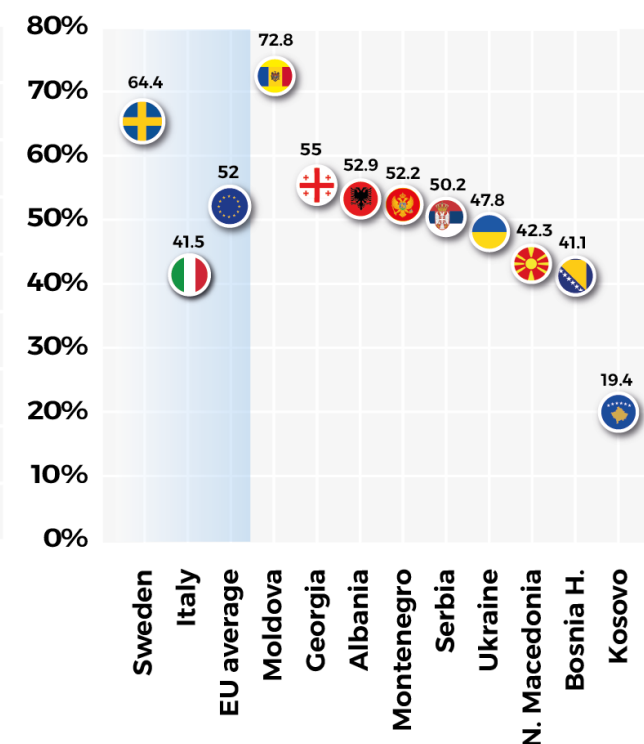
Youth unemployment rates. (% of total labor force, 2023)



Labor force participation rate. (% of total Population ages 15-64, 2022)



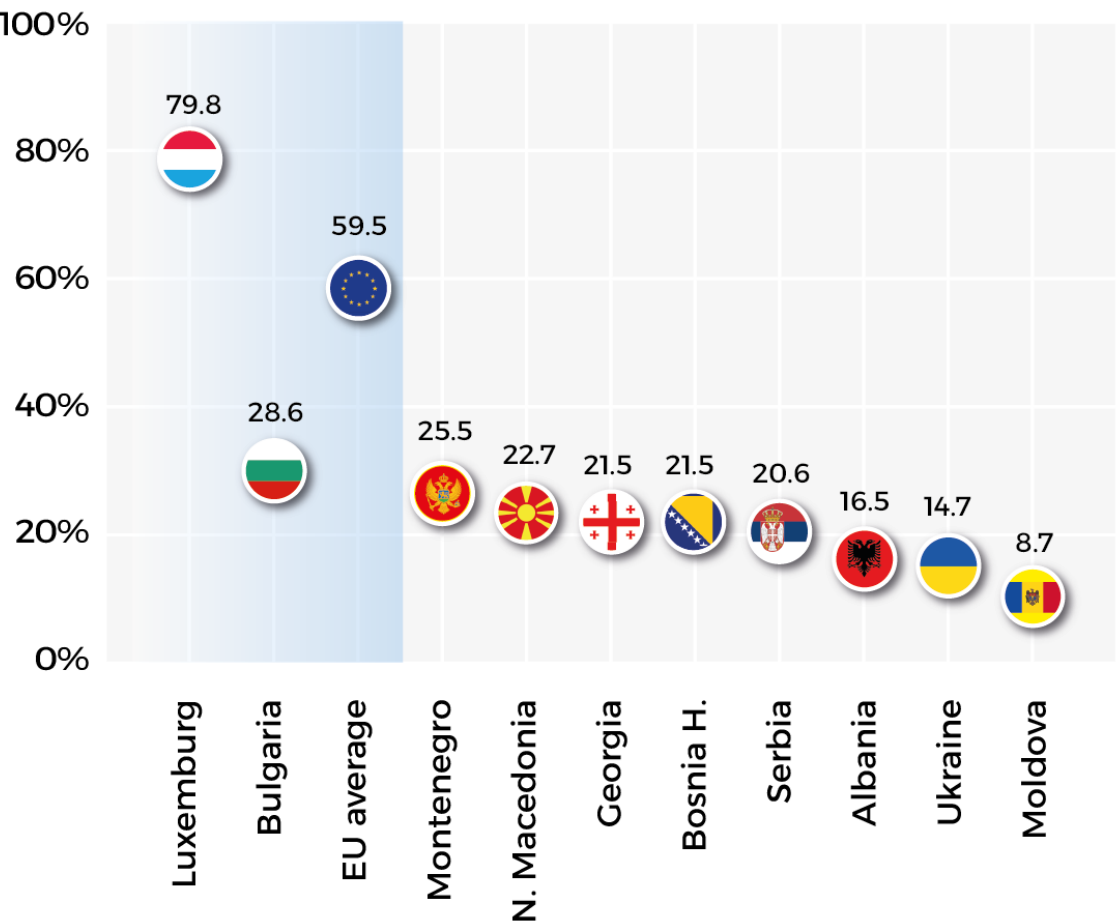
Female labor force participation rate. (% of total population ages 15-64, 2022)



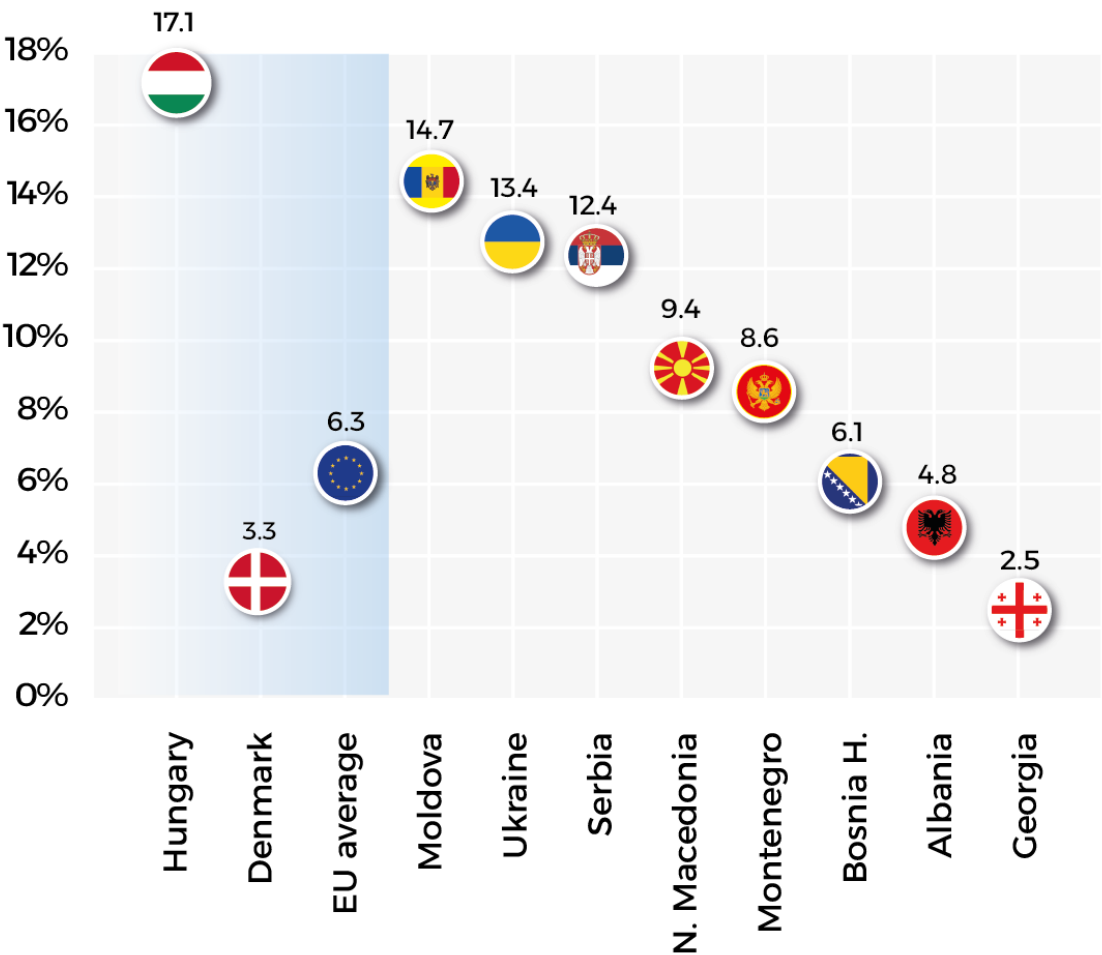
Dysfunctional labor markets in Western Balkan countries can create obstacles in their full and effective integration with the European single market. They create additional pressure for outward migration from the region (Dabrowski and Léry Moffat 2024).

There is a remarkable gap in terms of labor productivity between WB and EaP countries and the EU

Labor productivity. GDP per hour worked in 2023. (GDP constant 2017 international \$ at PPP)



Inflation. (consumer prices annual %, 2023)

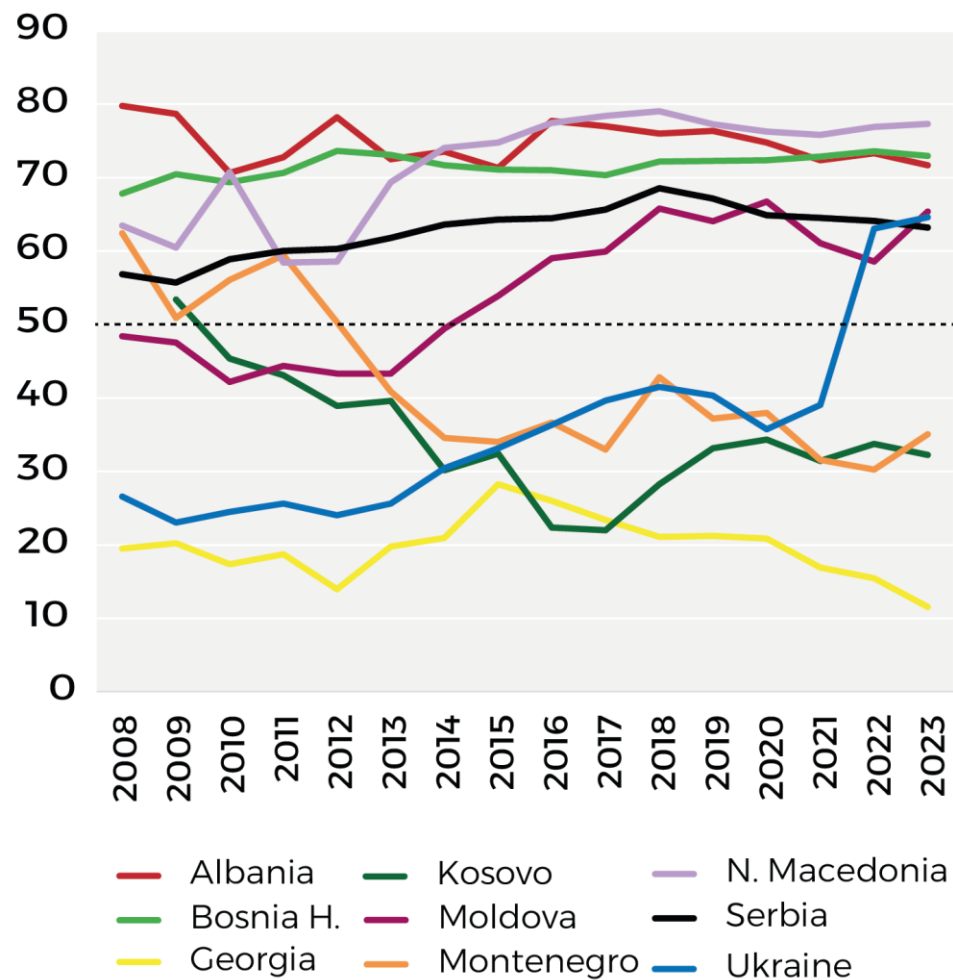


EU and neighboring countries were asymmetrically affected by the energy crisis following the war in Ukraine, with higher inflation rates negatively impacting consumer purchasing power.

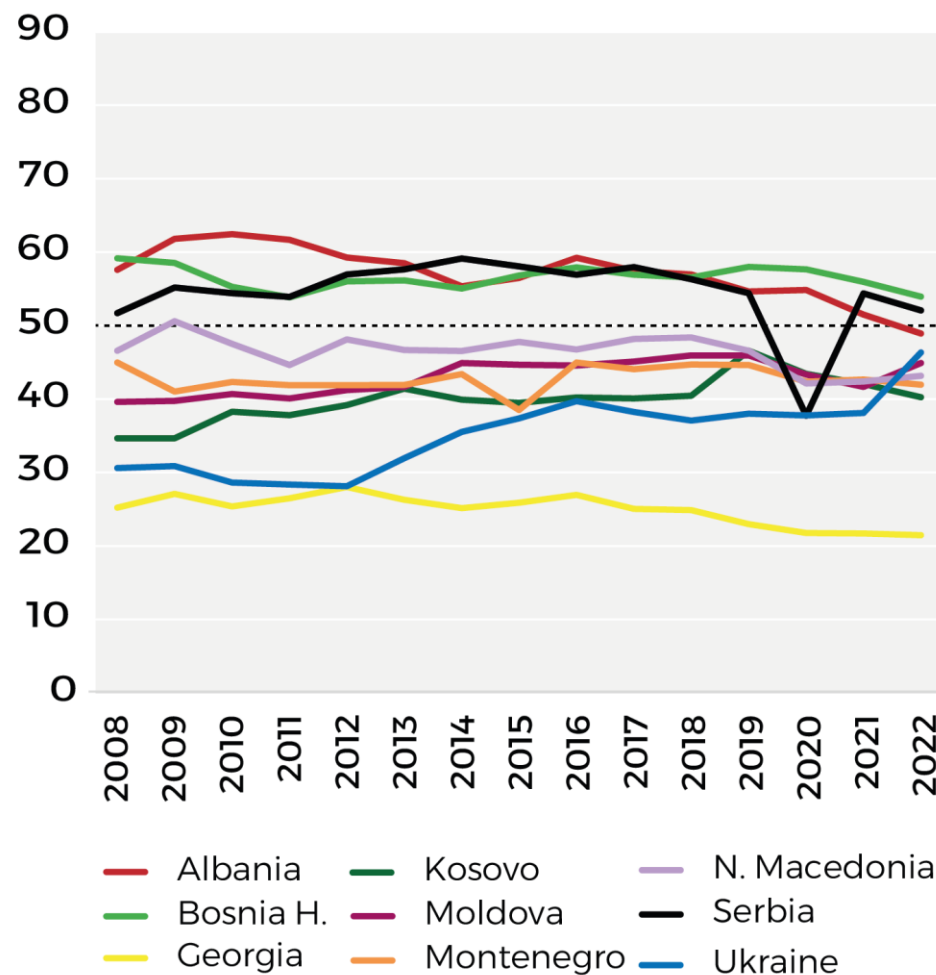
*Last data available (2021).
Source: ILO and Eurostat.

The EU is the main trading partner for the WB and EaP countries, with the exception of Georgia

Merchandise exports to the EU (% of total)



Merchandise imports from the EU (% of total)



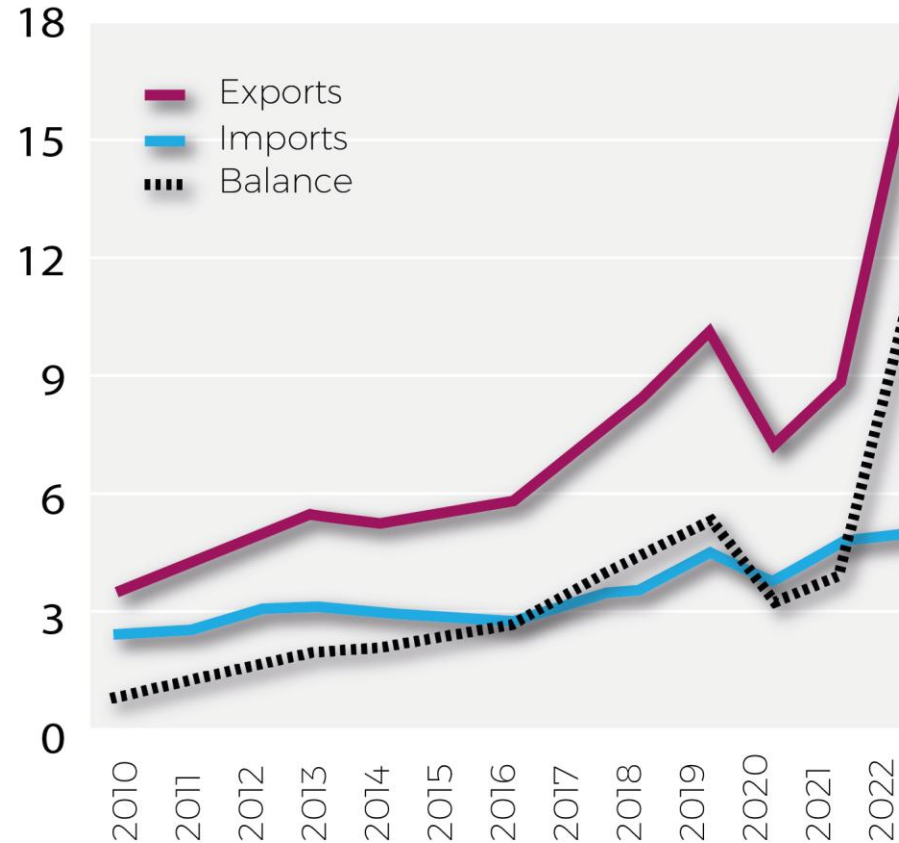
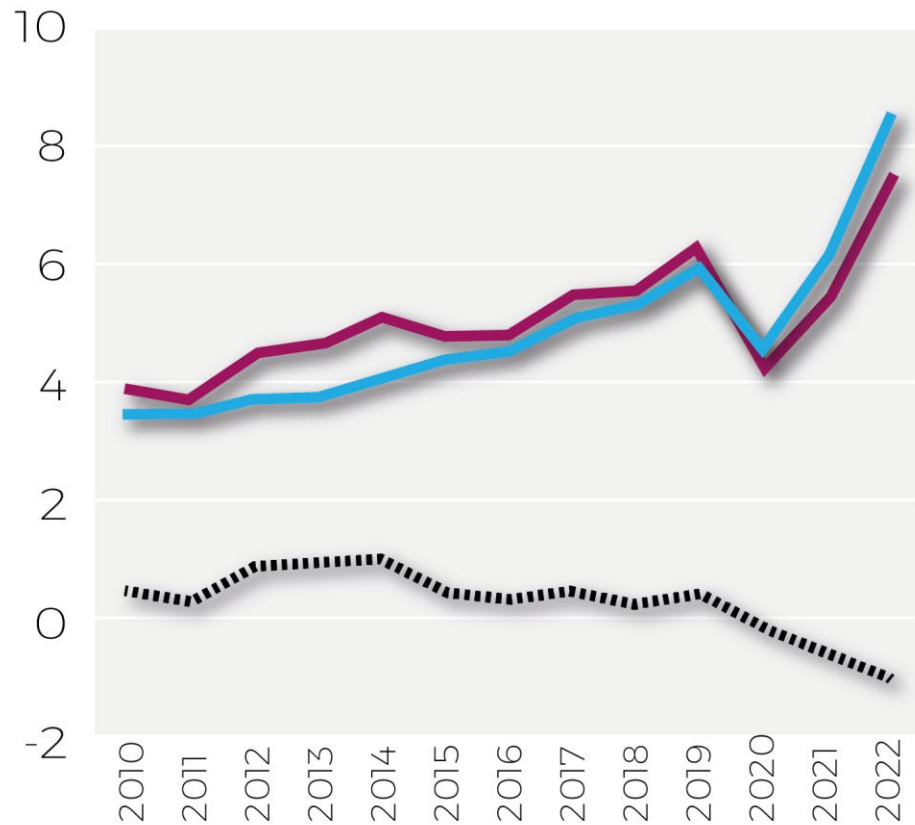
Moldova and Ukraine have become more dependent on EU trade over the last decade, whereas Montenegro and Kosovo have increased their exports to other EU candidate countries.

Georgia remains highly dependent on its neighboring countries and is gradually drifting away from the EU in commercial terms.

Source: CIDOB based on IMF Direction of Trade Statistics.

Trade in services is increasing, although starting from a very low base

EU27 trade in services with WB (left panel) and EaP countries (right panel). Billions euros

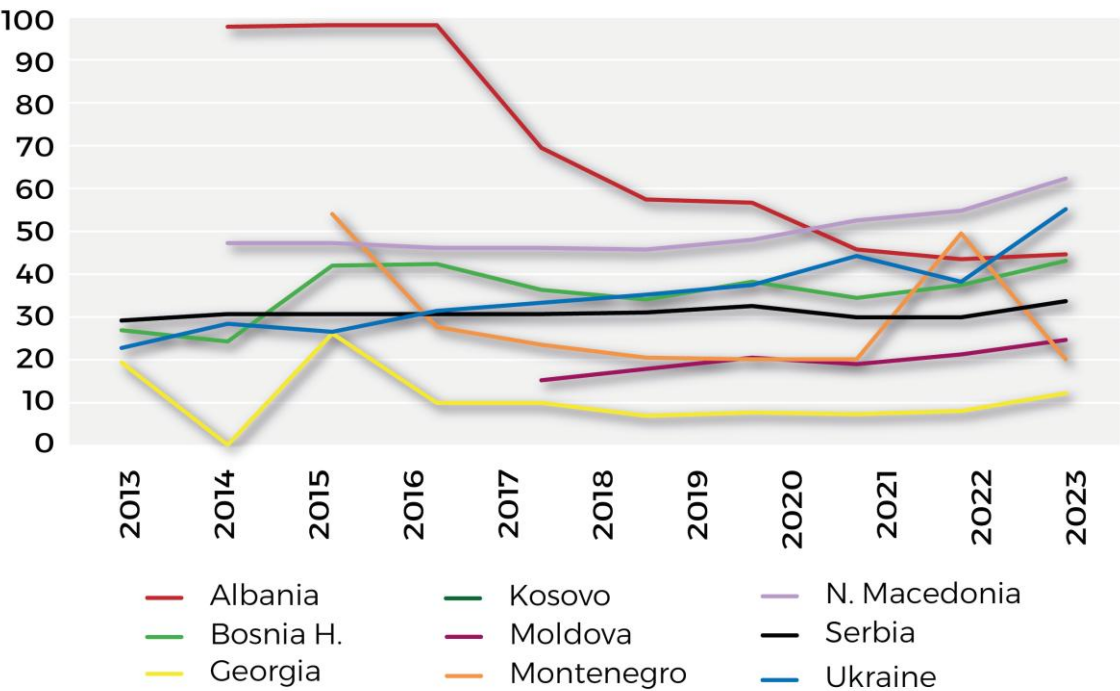


The EU-Ukraine DCFTA establishes a non-discrimination standard that has fueled trade in services, whereas the EU-WB Stabilisation and Association Agreements do not necessarily include this clause, thereby limiting trade growth (Steinbach, 2024).

Source: Steinbach, 2024.

The EU is a key player in FDI flows to WB and EAP, but these are only significantly increasing in Ukraine and North Macedonia

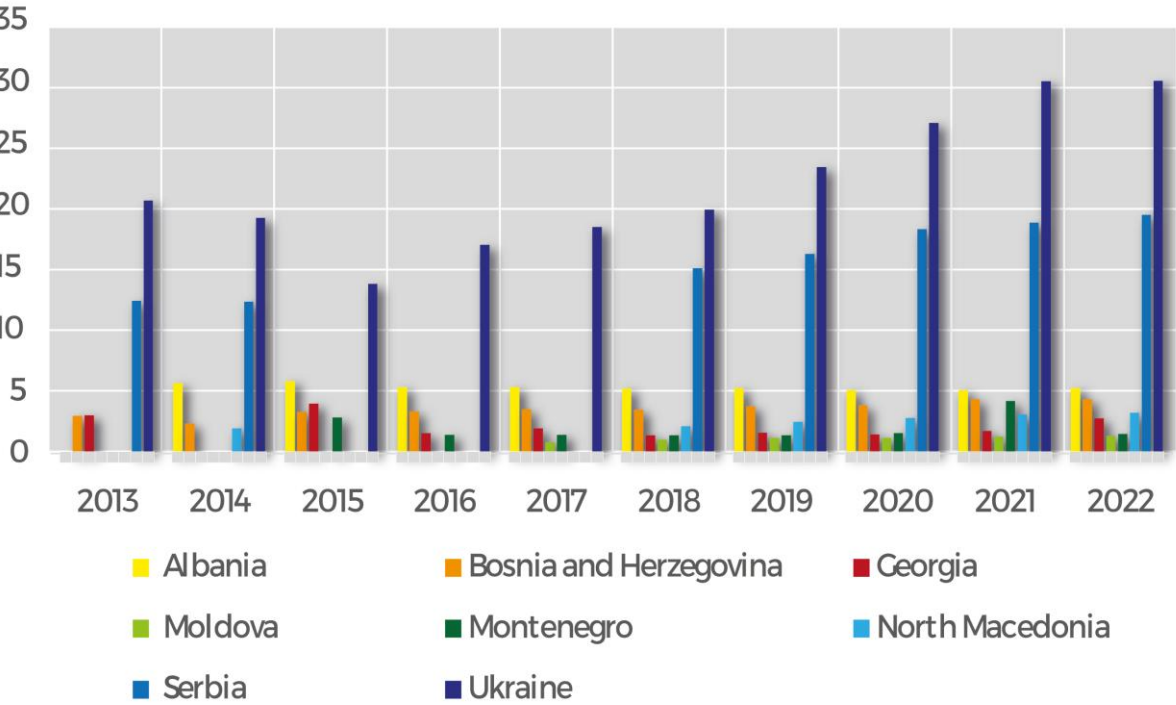
EU share of global Foreign Direct Investment Inward stock (%)



Several authors point to the potential role for WB and EaP countries in the EU “derisking” strategy as recipients of near-shoring production and origin of critical raw materials.

Sources: UNCTAD Foreign direct investment: Inward and outward flows and stock.

FDI stock. Billion euros

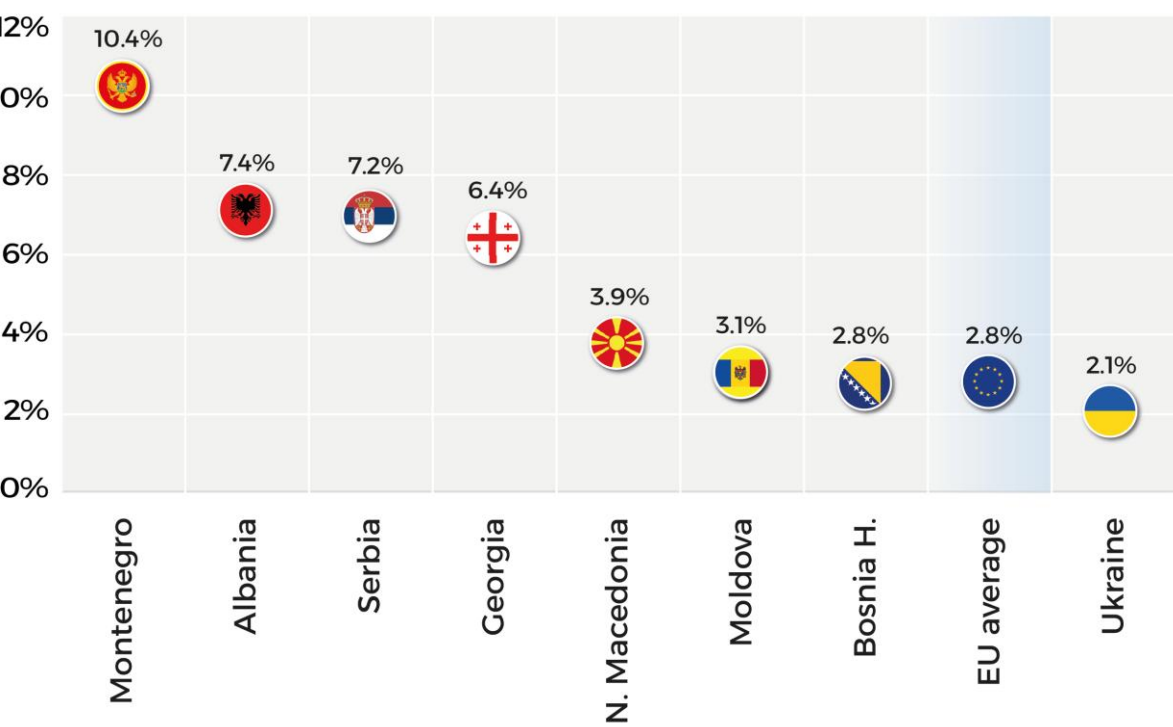


As a reference point, Bulgaria and Romania experienced a one-time surge in FDI after their accession to the EU but have remained at pre-accession levels since. Instead, factors associated with state-driven investment and geopolitical competition have significant effects on FDI in the Western Balkans (Steinbanch 2024).

* FDI statistics may vary depending on the sources due to tax avoidance and investment practices that obscure the true origin of the investment.
Sources: Eurostat EU direct investment positions, flows and income, by countries.

FDI is important for growth in several countries, but non-EU investment could have unintended consequences for recipient countries

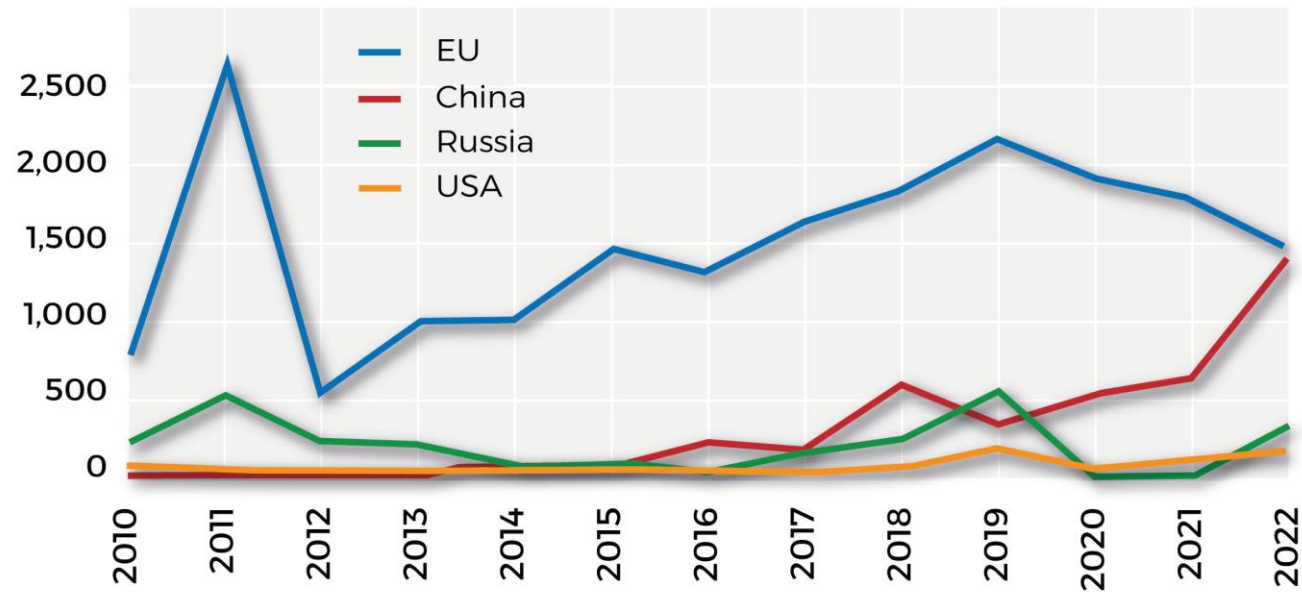
FDI flows as a percentage of GDP (2019-2023, %)



* Russia was Montenegro's largest investor from 2012 to 2022, but due to sanctions after the Ukraine invasion and Montenegro's geostrategic shift, Russian investments are decreasing (Vulović, 2023; Bykova et al., 2023).

Source: UNCTAD Foreign direct investment: Inward and outward flows and stock.

There is a growing Chinese investment footprint in Serbia.
FDI net flows in Serbia (million euros)

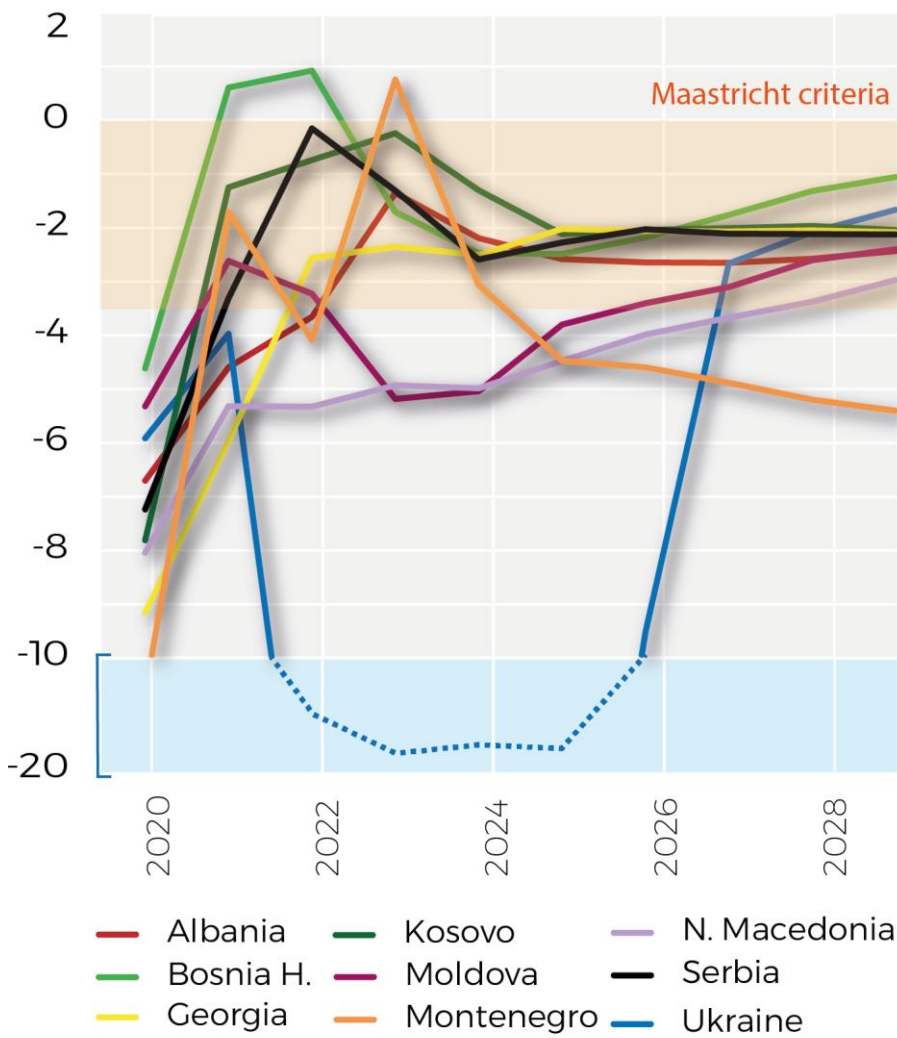


Vulović (2023) points out that FDI has not significantly contributed to economic development when environmental and social costs are considered. Weak legal and political structures favor “state capture”, while “corrosive capital” from non-EU countries could negatively impact the development of the rule of law and democracy in the Western Balkans.

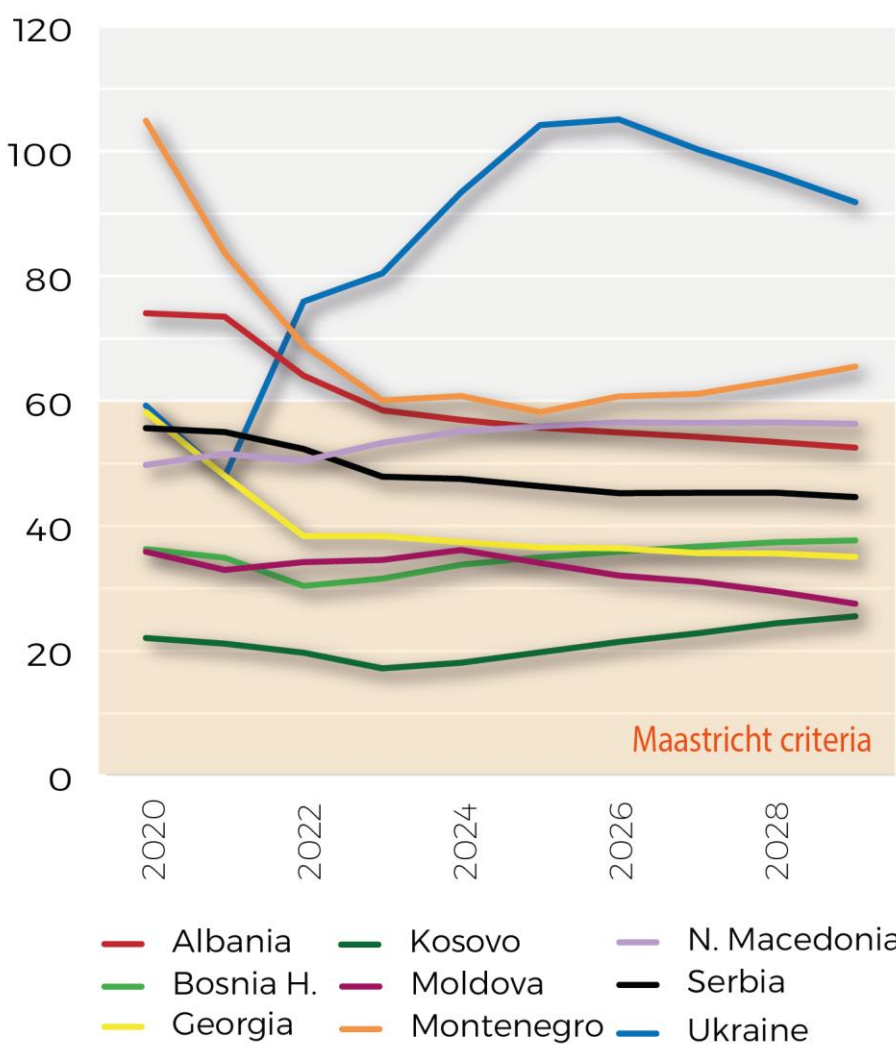
Source: The German Institute for International and Security Affairs (SWP) based on National Bank of Serbia.

Most candidate countries will meet EU debt and deficit criteria by the end of the decade

General government net lending/borrowing.
Percent of GDP (%)



General government gross debt. Percent of GDP (%)



Source: CIDOB based on data from the IMF World Economic Outlook.

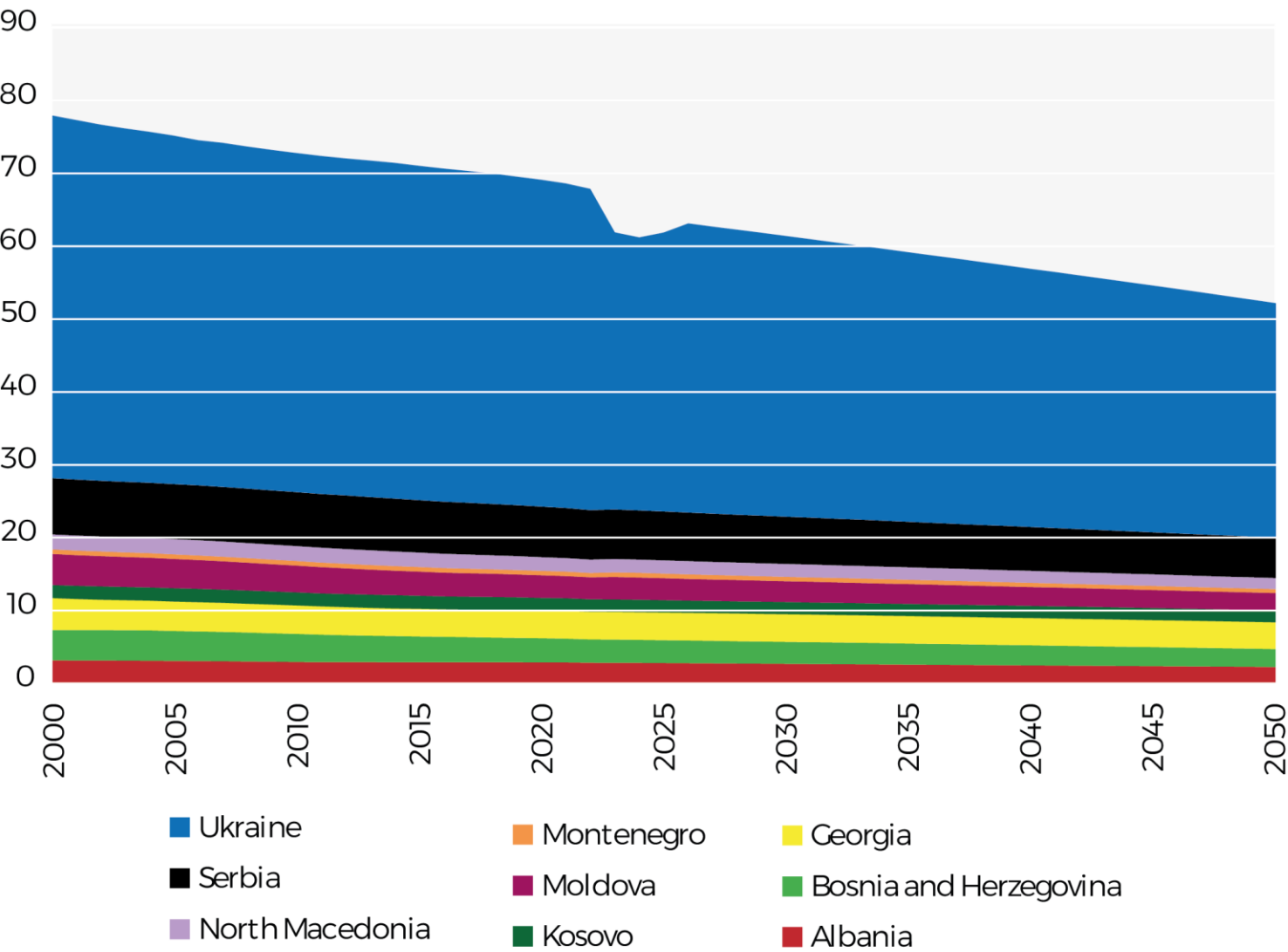
4. Demographic drivers and trends

Key drivers and trends

1. Accession of Ukraine will add another 44.5 million inhabitants (+ 10 percent) making it the fourth largest EU country.
2. War and conflicts remain major drivers of migration.
3. Candidate countries face similar challenges as the EU regarding a shrinking labor force population.
4. Continued trend of urbanization is a driver of societal divides.
5. Half of the populations of North Macedonia, Georgia, and Moldova are concentrated in their respective capital cities.

Accession of Ukraine will add another 44.5 million inhabitants (+ 10 percent) making it the fifth largest EU country

Total population of candidate countries from 2000 to 2050. Millions



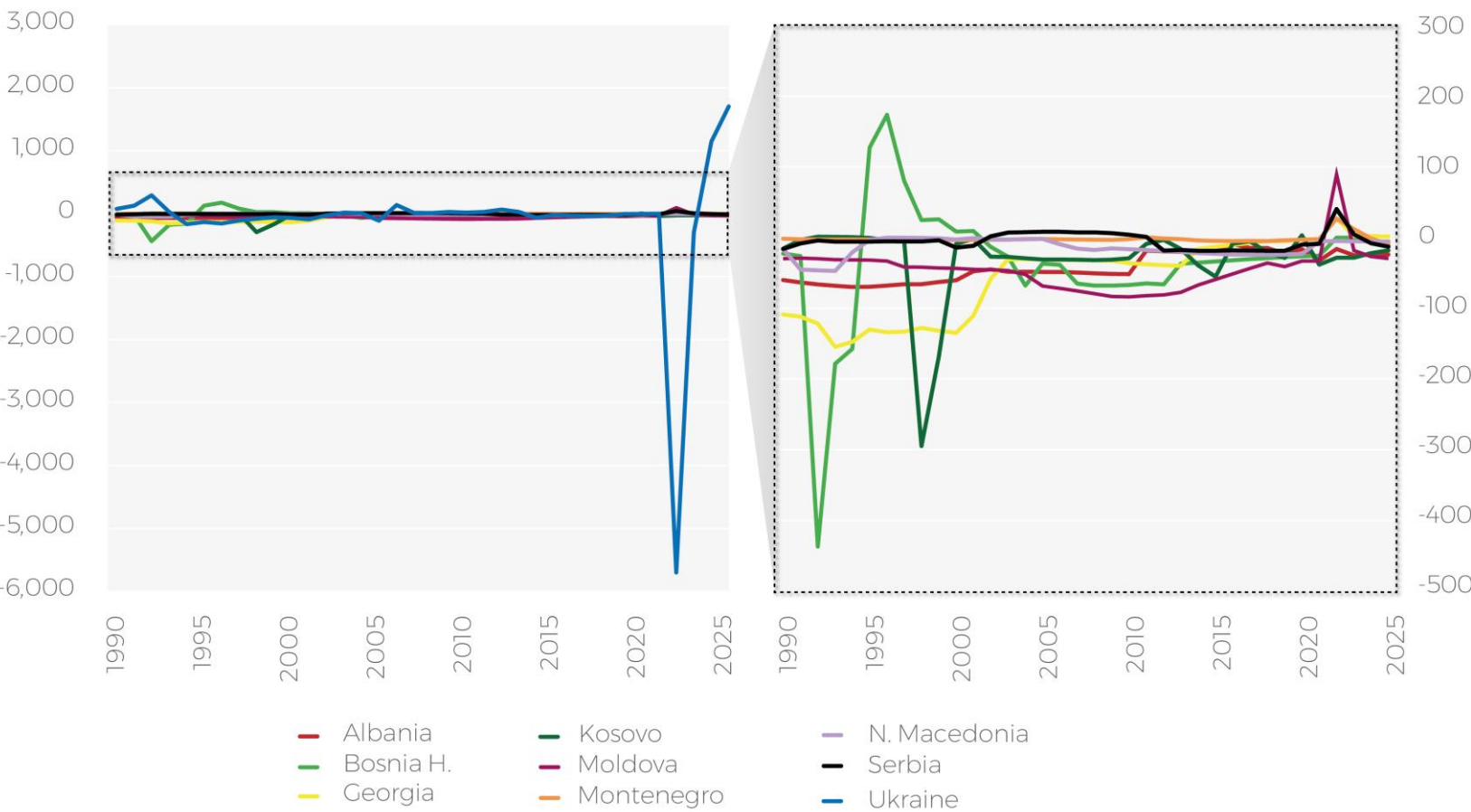
Based on the data for 2021, all candidate countries (except Ukraine) will add an additional 24.1 million inhabitants to the EU's 447.7 million (+5 percent).

We use the data of 2021, to exclude the effects of the Russian war of aggression against Ukraine on the countries' population size. Since most Ukrainian refugees are currently within the European Union, the overall impact on the EU is taken into consideration, regardless of the number of individuals returning to Ukraine post-war.

Source: UN World Population Prospects 2024.

War and conflicts remain major drivers of migration

Net migration of candidate countries in thousands from 1990 to 2025



Historically, war and conflicts remained major drivers of migration. However, economically and politically motivated migration still results in a net loss of population due to migration.

Source: UN World Population Prospects 2024 and Balkan Eurobarometer 2023.

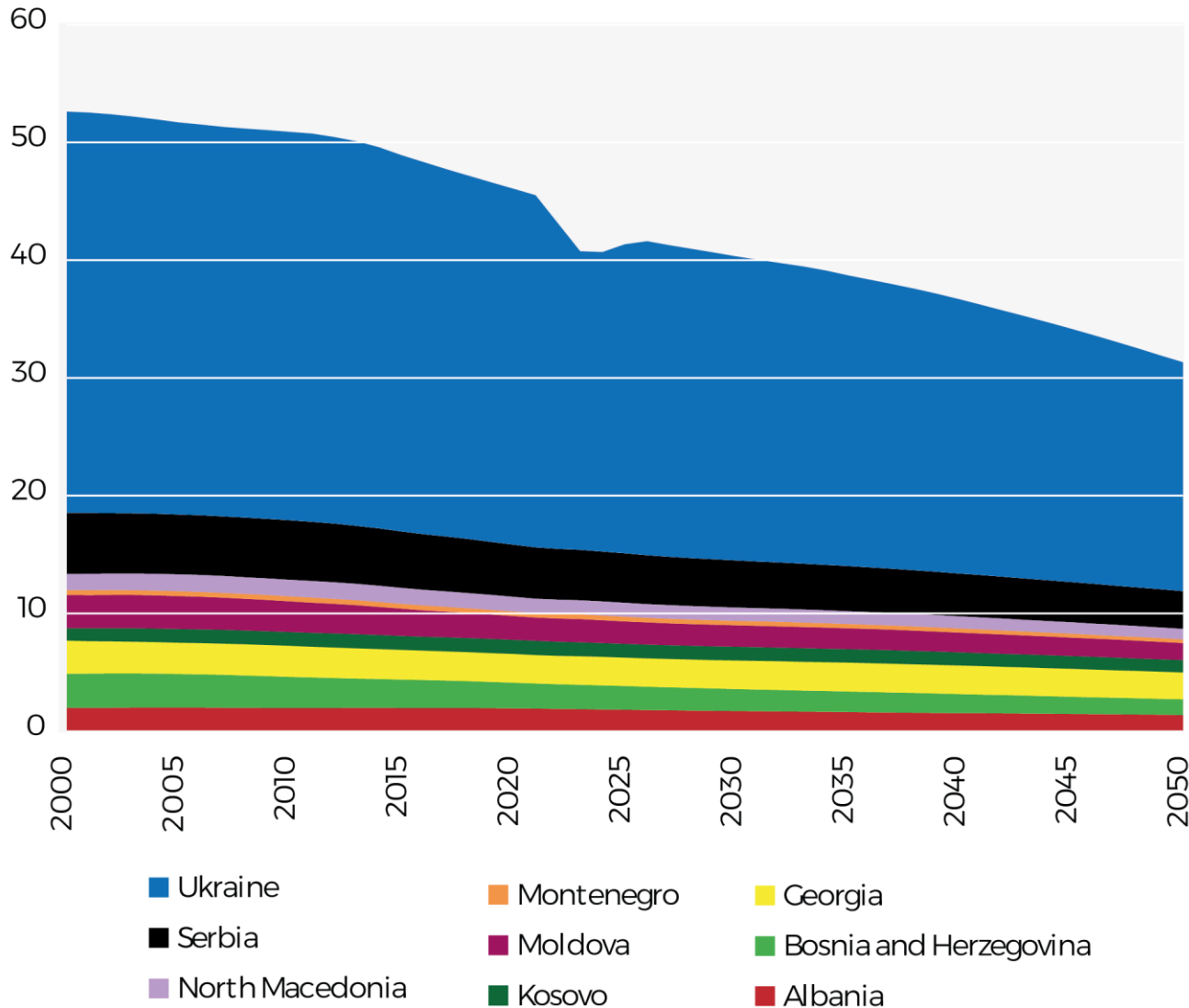
Brain drain is considered one of the main problems for business in WB, particularly in Albania and Bosnia and Herzegovina. Almost half of WB citizens are not satisfied with job opportunities and more than half who think of living abroad would go to the EU, according to Balkan Eurobarometer (2024).

Would you consider living and working abroad? (2023)

	Yes	No
Kosovo	57	38
Albania	49	48
Montenegro	45	52
Serbia	41	55
Bosnia and H.	38	54
N. Macedonia	35	59

Candidate countries face similar challenges as the EU regarding a shrinking labor force population

Working age population of candidate countries from 2000 to 2050 (including projections). Millions

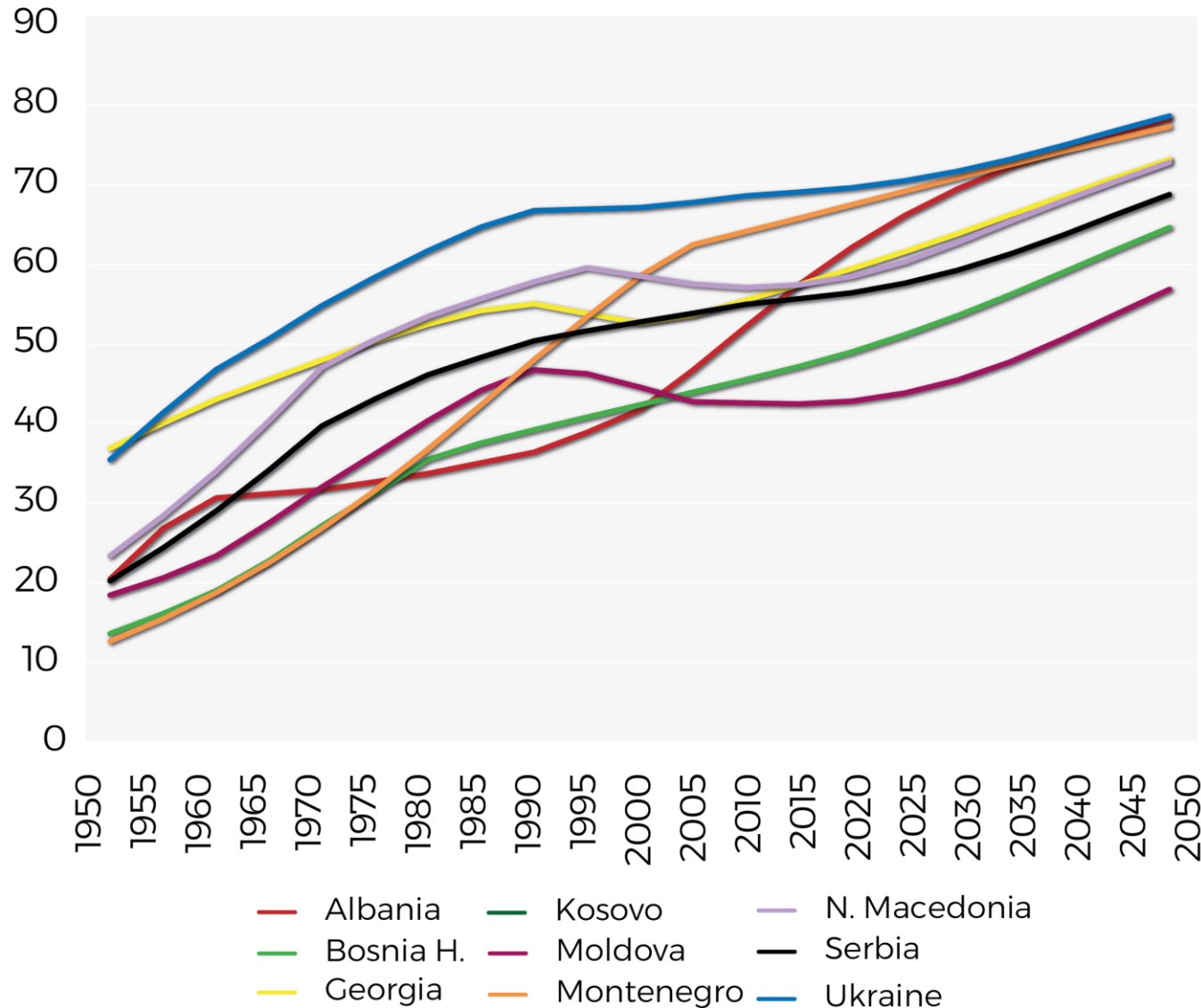


As projections for all candidate countries show a shrinking working age population, enlargement is no solution to the increasing lack of staff and workers in the EU.

Source: UN World Population Prospects 2024.

Continued trend of urbanization is a driver of societal divides

Percentage of population living in urban areas for all candidate countries from 1950 to 2050 (%)

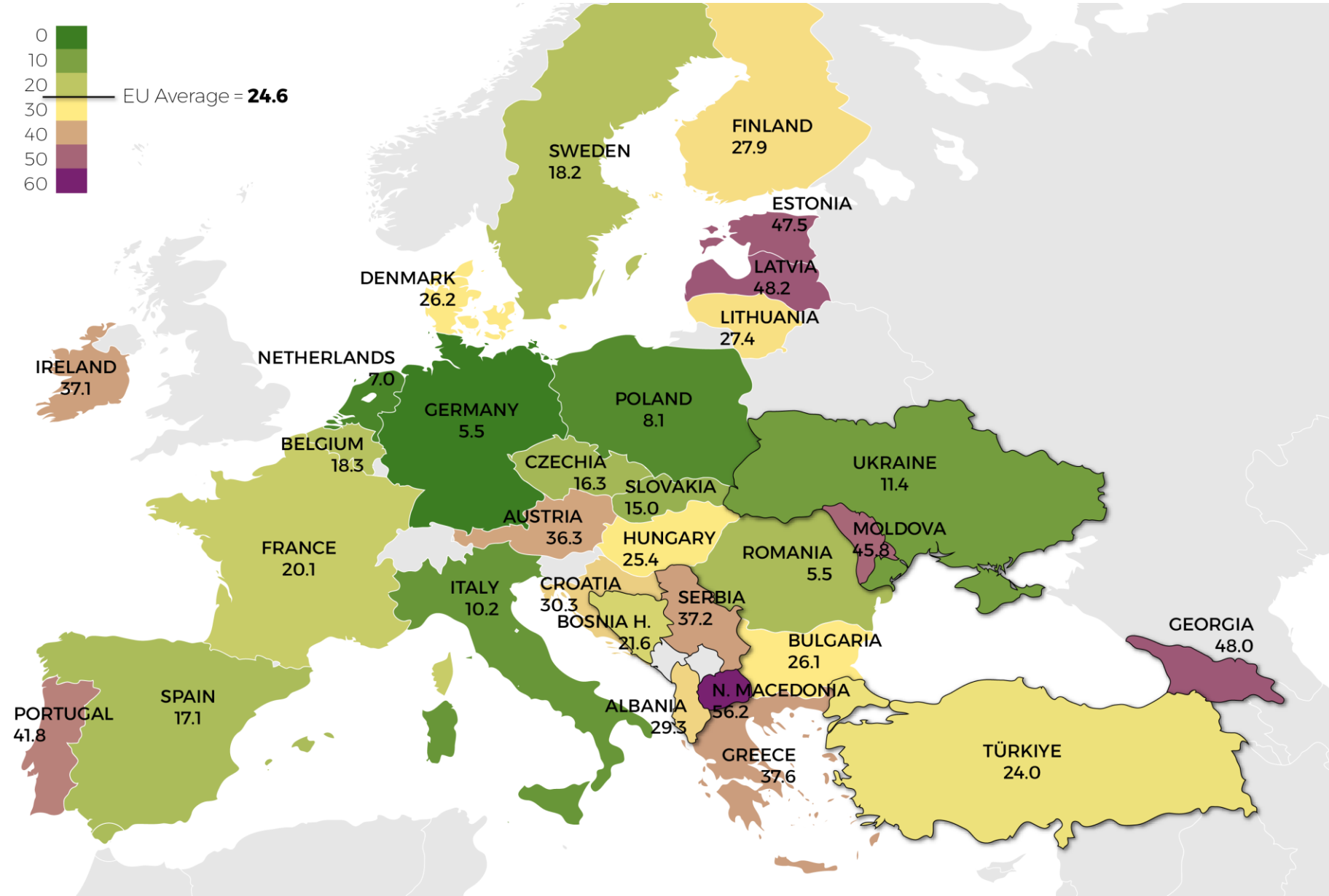


Projections for candidate countries assume continued urbanization. Even in Georgia, Moldova and North Macedonia, recent trends or ruralisation have stalled and changed to urbanization.

This trend drives socio-economic divides in societies and could result in increased political polarization (Luca et al. 2023).

Source: UN World Urbanization Prospects.

Half of the populations of North Macedonia, Georgia, and Moldova are concentrated in their respective capital cities



Percentage of population living in the largest city in all member states and candidate countries for 2023

Except for Ukraine and Bosnia and Herzegovina, all candidate countries show considerable regional inequality.

Source: UN World Urbanization Prospects.

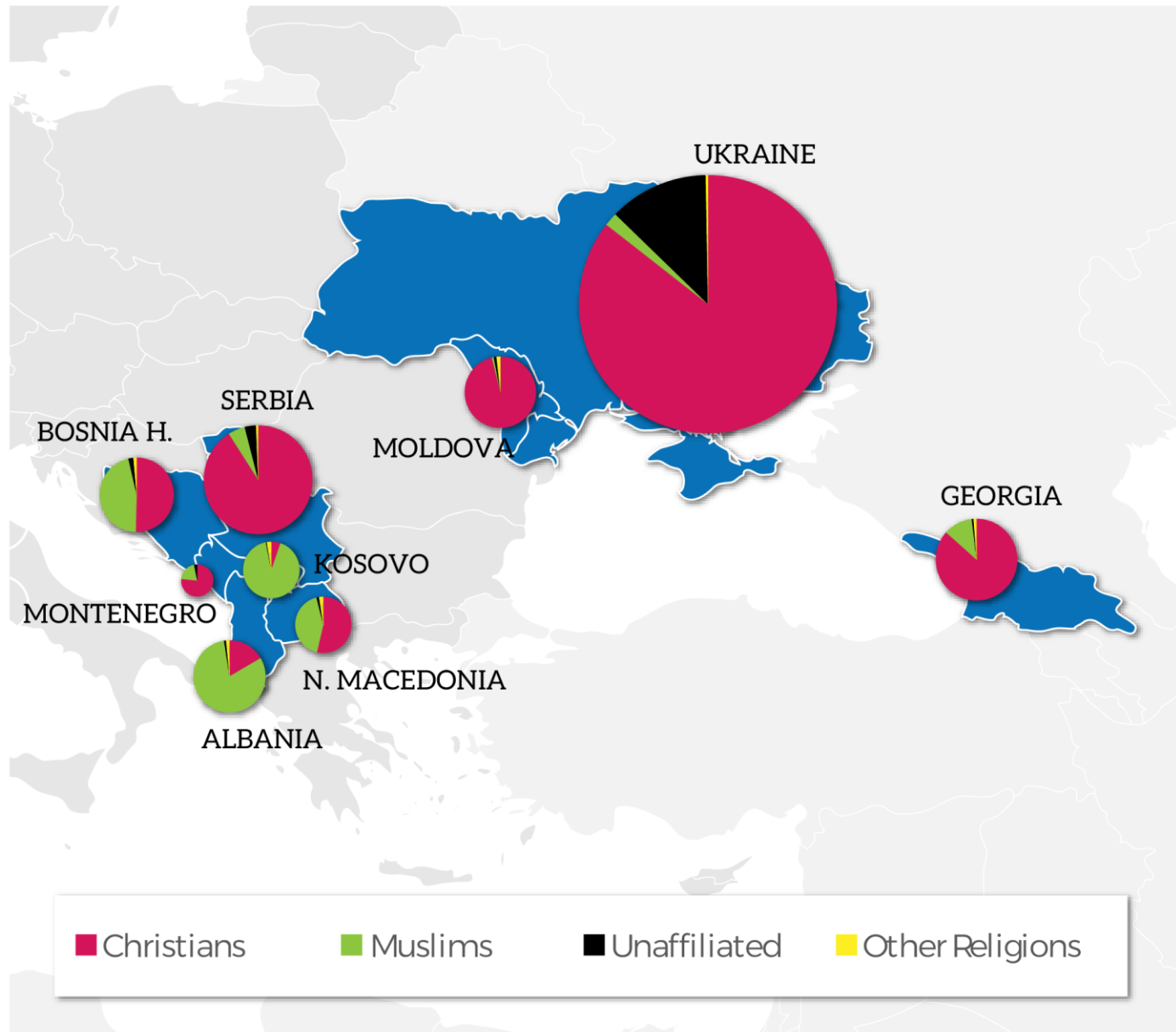
5. Social drivers and trends

Key drivers and trends

1. Enlargement will increase religious diversity of the European Union.
2. Ethnic division and minority rights have been an historical challenge for many candidate countries.
3. Despite decreasing poverty levels, fighting poverty remains a challenge in the enlarged EU.
4. Georgia and Serbia have significantly higher economic inequality than EU standards.
5. Enlargement will increase the EU's risk exposure in terms of media literacy.
6. Gender equality on the labour market remains a challenge in the EU and the candidate countries.
7. Situation of Civil Society in most candidate countries is much better than in EU countries such as Hungary in Poland.

Enlargement will increase religious diversity of the European Union

Religious affiliation of citizens in the candidate countries for the year 2020 (%)



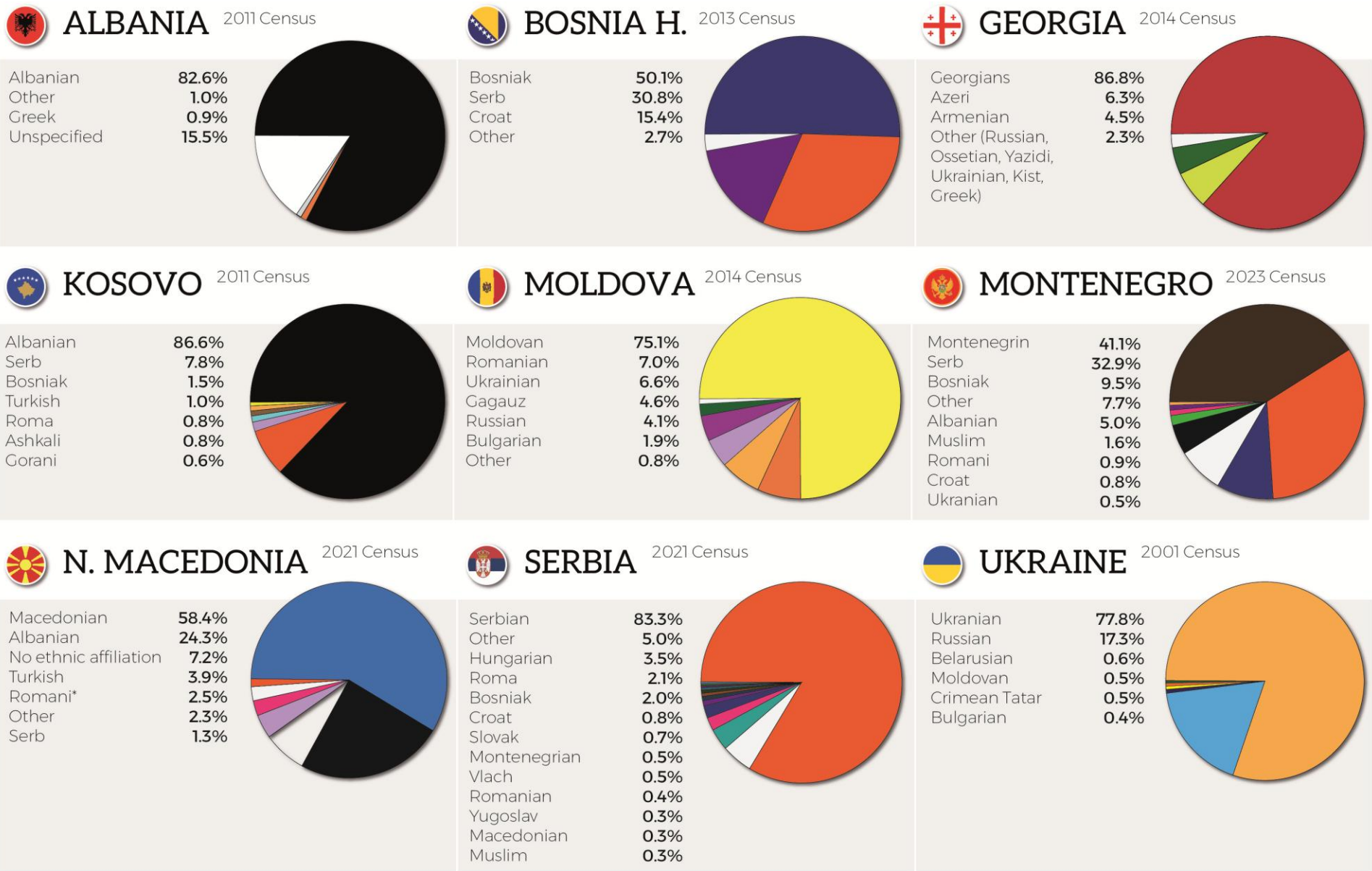
Enlargement will make two countries with a Muslim majority and two countries with major Muslim congregations EU member states, accounting for 8.5 million people, 1.9% of EU population in 2020 (1.6% in 2050 according to projections).

Furthermore, the majority of Christians in these countries belong to Orthodox churches, further diversifying religious plurality in the EU.

* Most Christian Orthodox churches of Bosnia and Herzegovina, Kosovo, Montenegro, and Serbia are under the Serbian Patriarchate. Albania and Georgia have autocephalous churches. Moldova's church status is contested among the Serbian Patriarchate, Russian Patriarchate, and Romanian Patriarchate. Ukraine declared autocephaly in 2022, banning affiliation with the Russian Patriarchate.

Source: Pew-Templeton Global Religious Futures Project.

Ethnic division and minority rights have been an historical challenge for many candidate countries



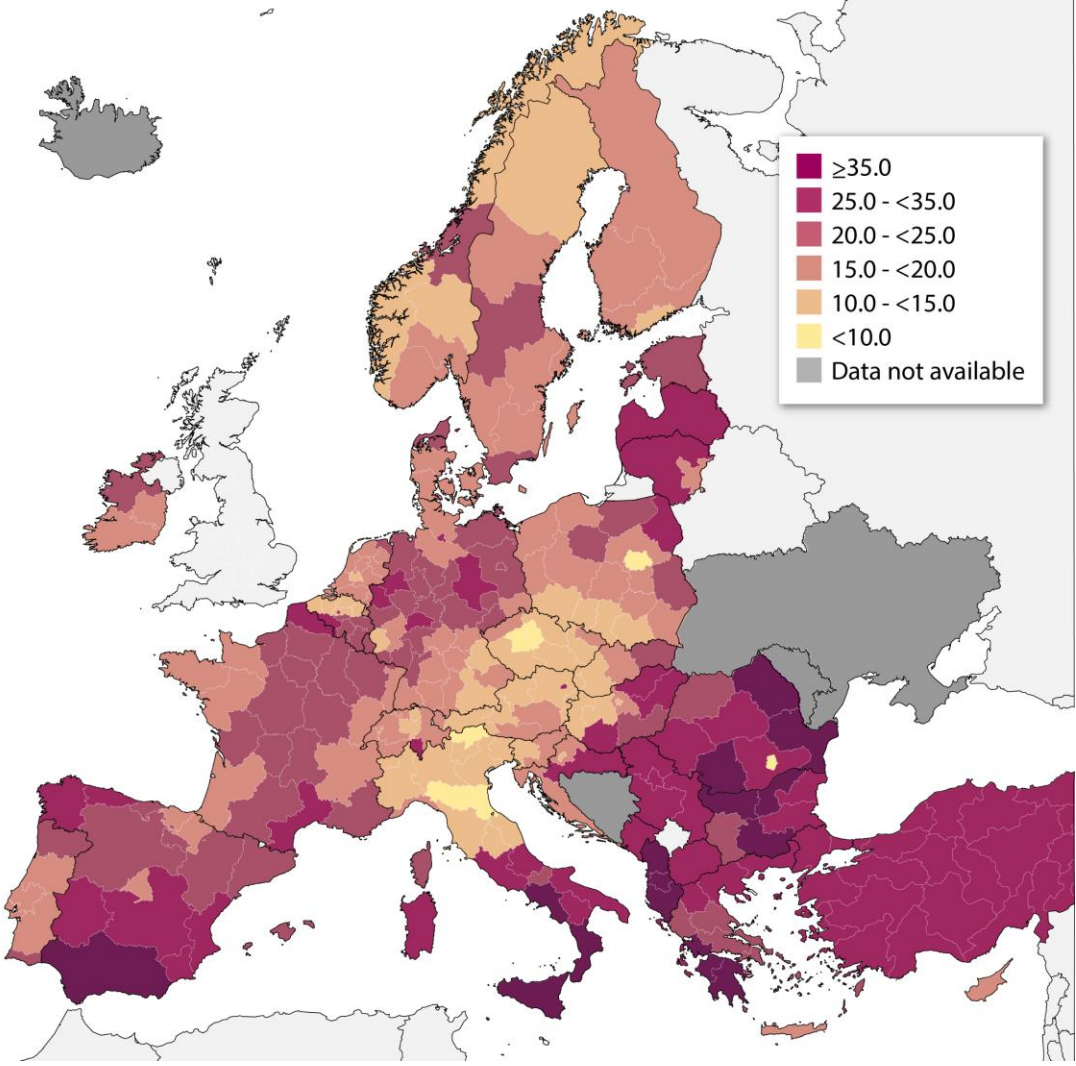
Minorities are often geographically concentrated and can influence geopolitical dynamics despite being a small portion of the total population. For example, Hungary and Romania have expressed concern about the status of their communities in Ukraine.

*North Macedonia's data represent total resident population. Romani populations are usually underestimated in official statistics and may represent 6.5–13% of North Macedonia's population, according to US CIA Factbook (2024).

Sources: The World Factbook (US CIA), ECMI, Montenegro Statistical Office and Statistical Office of the Republic of Serbia.

Despite decreasing poverty levels, fighting poverty remains a challenge in the enlarged EU

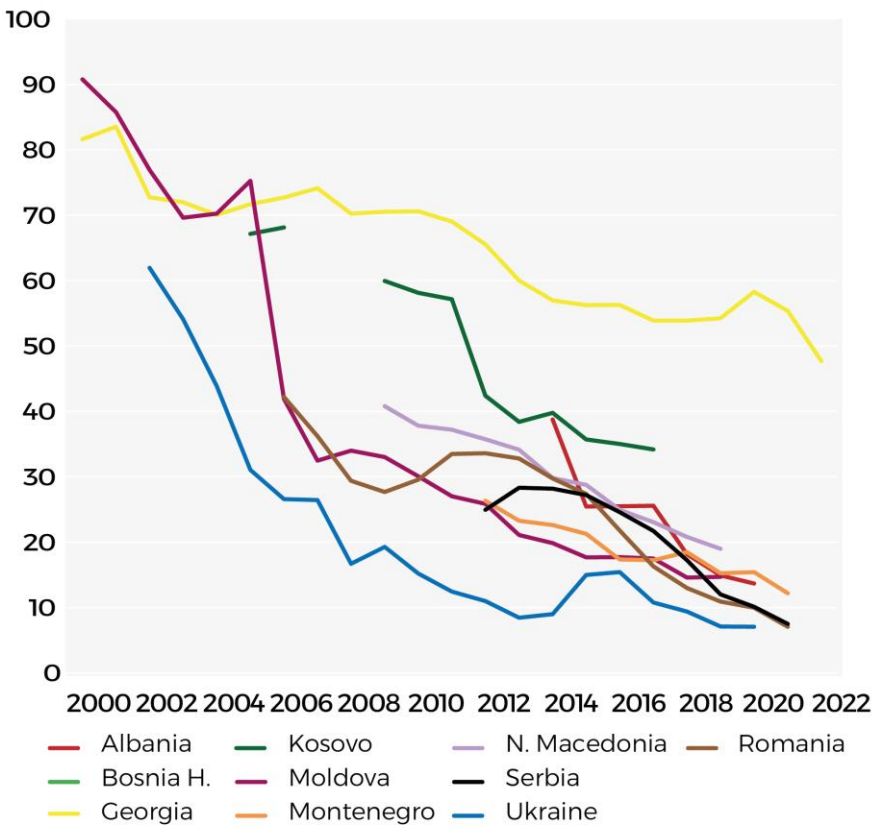
People at risk of poverty or social exclusion (% , 2023). By NUTS 2 regions



Since 2000, all candidate countries show a positive trend of decreasing poverty levels, with most of them having around the double percentage of citizens living below \$6.85 per day than Romania has.

However, fighting poverty in the candidate countries remains a crucial challenge, especially in Georgia and Kosovo with exceptionally high poverty levels.

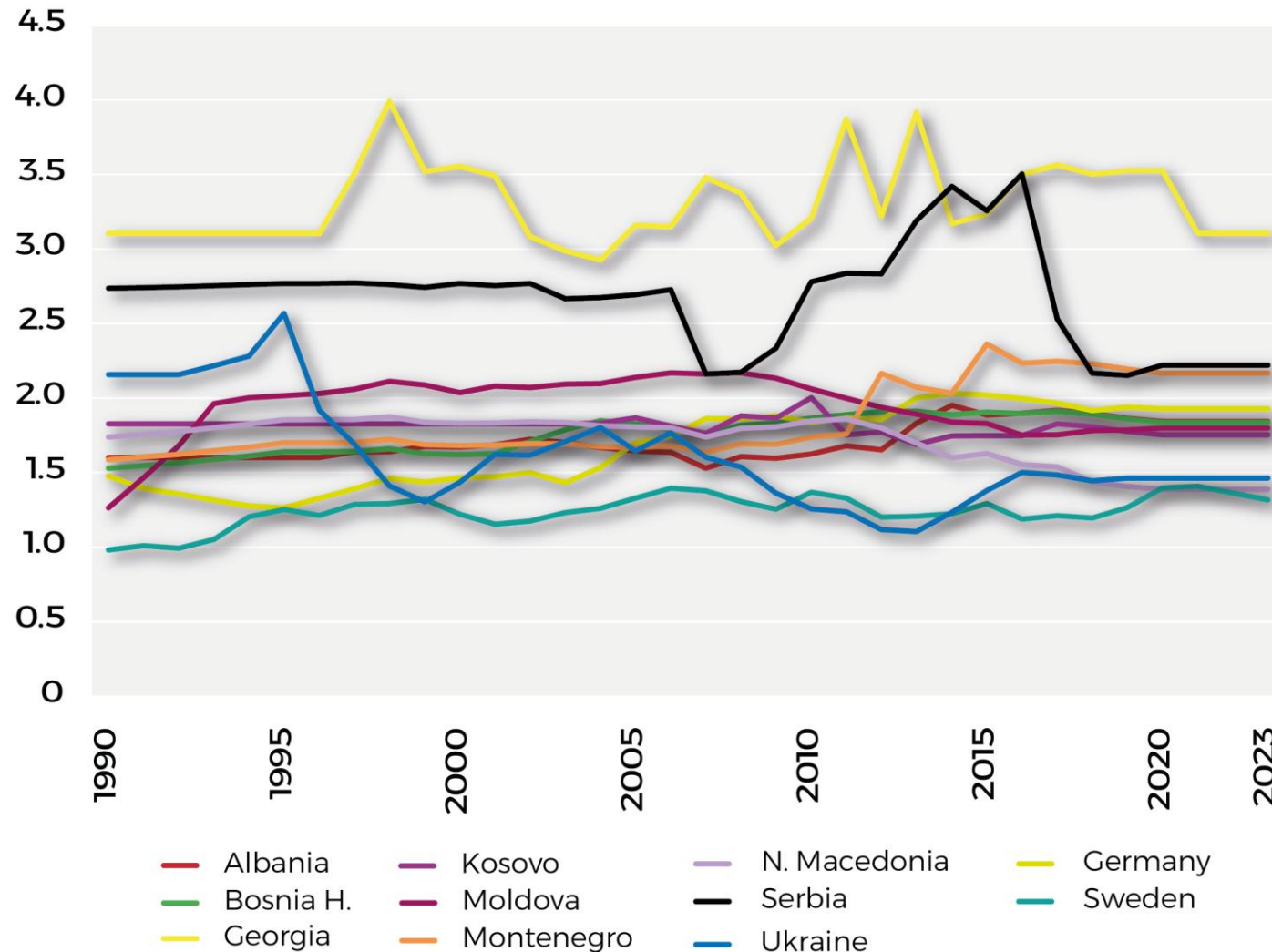
Poverty levels in all candidate countries and Romania as percentage of population living below \$6.85 a day. Share of population living in households with consumption or income per person (%)



Note: the threshold of \$6.85 per day was chosen to still allow for a proper display of the situation in Georgia.

Georgia and Serbia have significantly higher economic inequality than EU standards

Inequality measured as the ratio of top 10% to bottom 50% income shares for all candidate countries, Germany (largest economy), and Sweden (best performing EU member state in 2023) from 1990 to 2023



In terms of social inequality, candidate countries show considerably different performance:

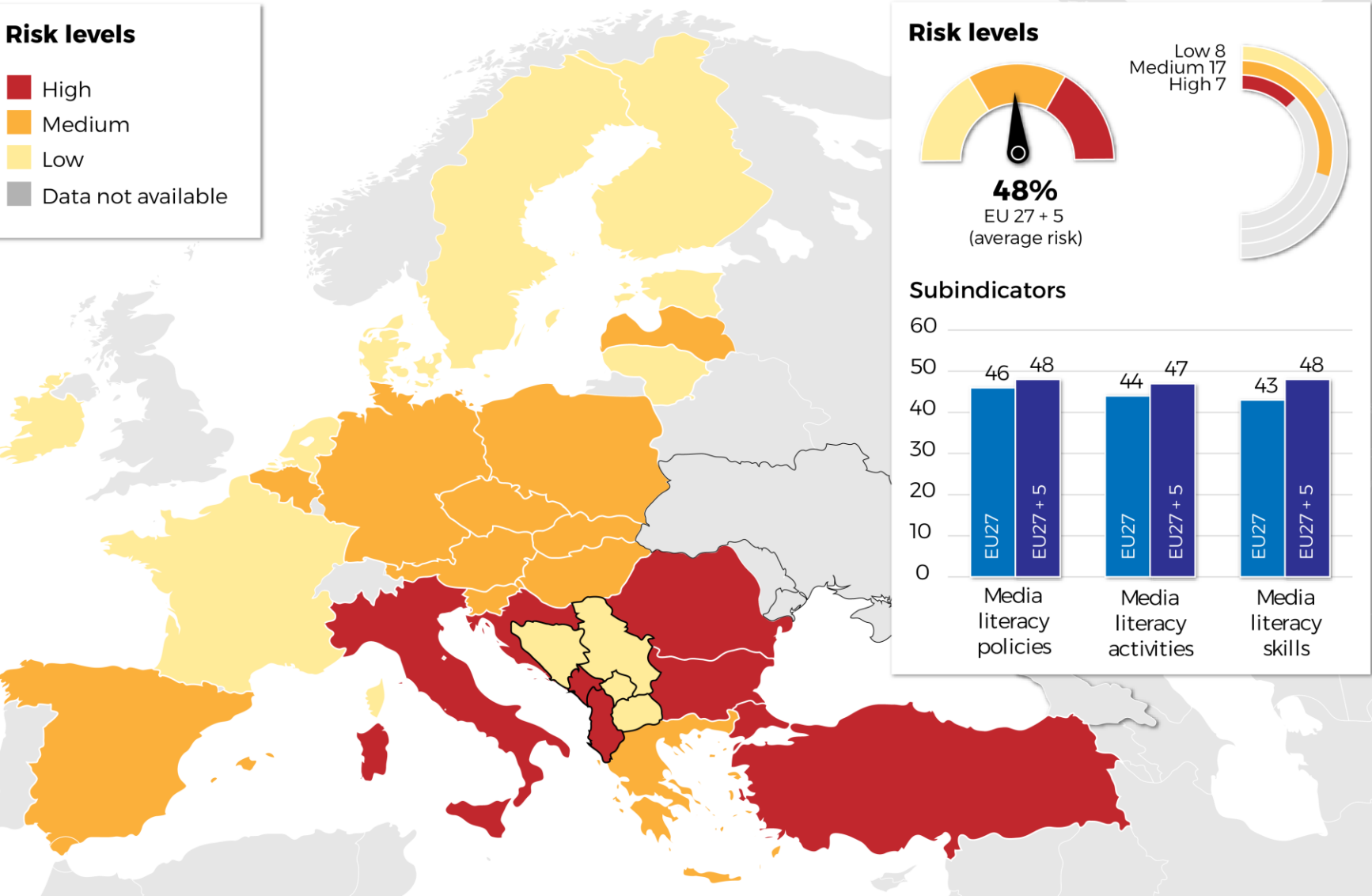
- North Macedonia and Ukraine have inequality levels comparable to best performing EU member state Sweden.
- For the year 2023, six candidate countries are doing better than the EU's largest economy Germany.
- In Georgia since independence and in Serbia until 2016, inequality is/was on a much higher level unknown in the EU.*

* Only in Estonia in 2003 and in Romania in 2007, the top 10 % house holds with the highest annual income had more than three times the income of the bottom 50 % with the lowest income.

Source: World Inequality Database.

Enlargement will increase the EU's risk exposure in terms of media literacy

Risk levels of media literacy



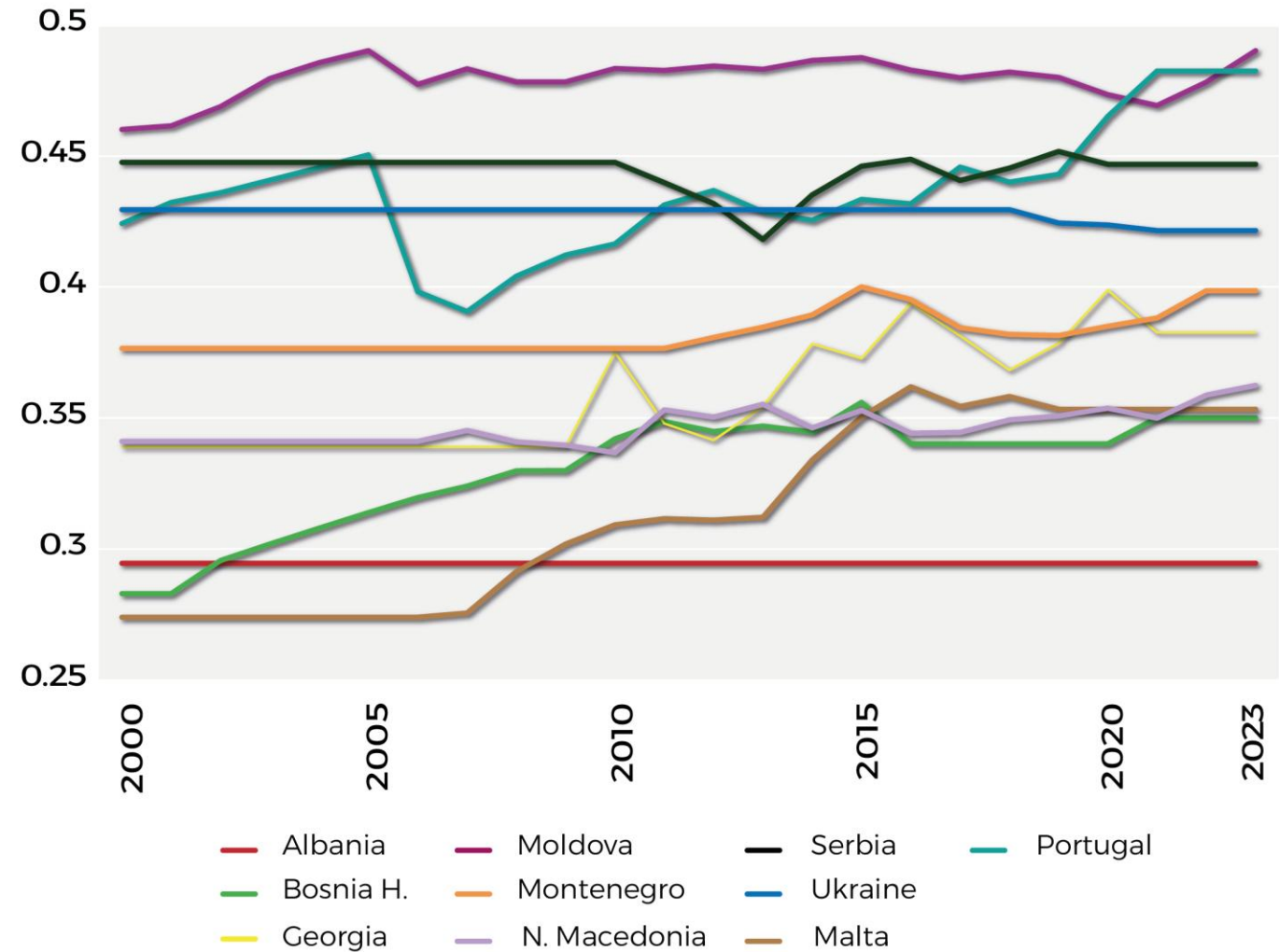
The risk to media literacy, defined as individuals' capacity to access, use, critically assess and create media content, is analyzed in three dimensions: policies, activities, and skills. Qualitative sub-indicators are directly coded with three values of low, medium, and high risk, while for numerical data risk thresholds are defined accordingly.

Measuring media literacy policies, activities and skills, currently just eight countries are at low risk. For all subindicators, enlargement will increase the EU's risk exposure.

Source: EUI's Media Pluralism Monitor 2024 for the EU-27, Albania, Montenegro, North Macedonia, Serbia and Turkey.

Gender equality on the labor market remains a challenge both in the EU and the candidate countries

Gender Inequality on the labour market measured as the female share of pre-tax labour income for all candidate countries, Malta (smallest share of EU-27 in 2023), and Portugal (largest share of EU-27 in 2023) from 2000 until 2023



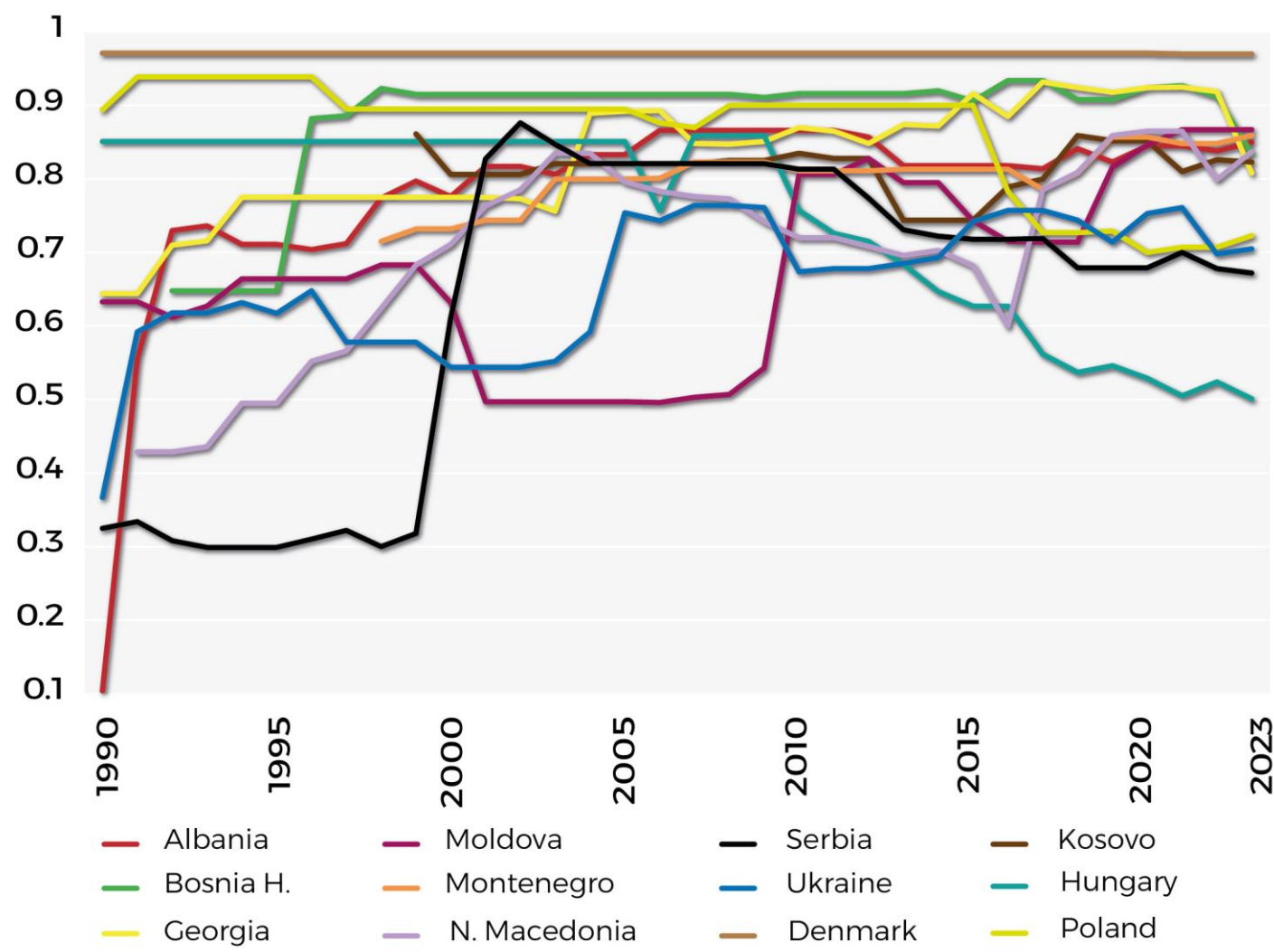
Following a decade of limited change, gender equality on the labour market is improving since 2000. The trend is, however, not consistent, but varies. With the exception of Albania, all candidate countries fall roughly in the range of EU member states between Malta (35%) and Portugal (48% of female income share).*

* In 2023, Moldova (49 %) had a larger share of female pre-tax labour income than Portugal (48.2 %), while Bosnia and Herzegovina (34.9 %) had a smaller one than Malta (35.3 %).

Source: World Inequality Database.

Situation of Civil Society in most candidate countries is much better than in EU countries such as Hungary in Poland

V-Dem Core Civil Society Index for all candidate countries, Denmark (best performing EU state in 2023), Hungary (worst performing EU state in 2023), and Poland (second worst performing EU state in 2023) from 1990 to 2023



The V-Dem Civil Society index measures government influence on CSOs, their involvement in decision-making and some aspects of the CSOs landscape.

Until 2023, the situation of civil society in all candidate countries is considerably better than in Hungary.* In Ukraine and Serbia, it is slightly below the situation in Poland.**

* The crackdown of the pro-European opposition in Georgia since late 2024 will most likely change this finding.

** Ukraine is performing worse than Poland since the beginning of the large-scale Russian war against the country.

Source: Varieties of Democracy (V-Dem) Project.

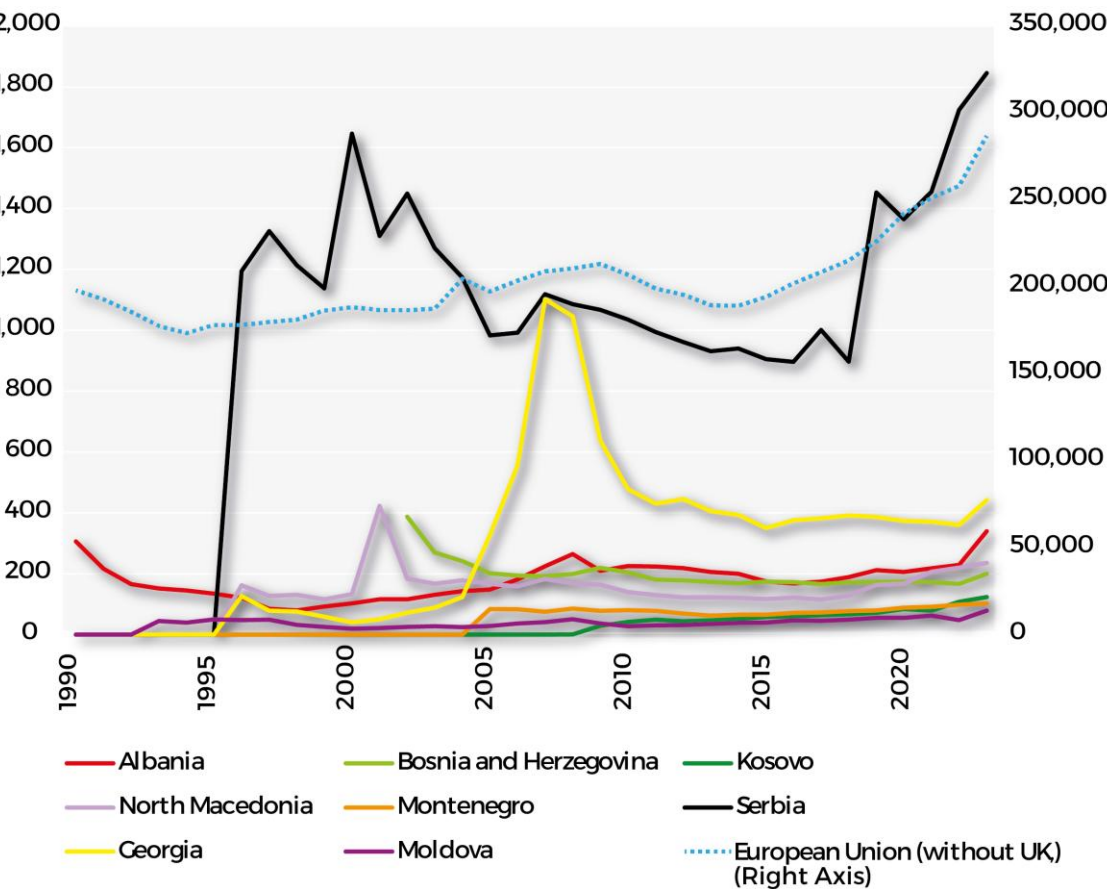
6. Resilience and strategic autonomy

Key drivers and trends

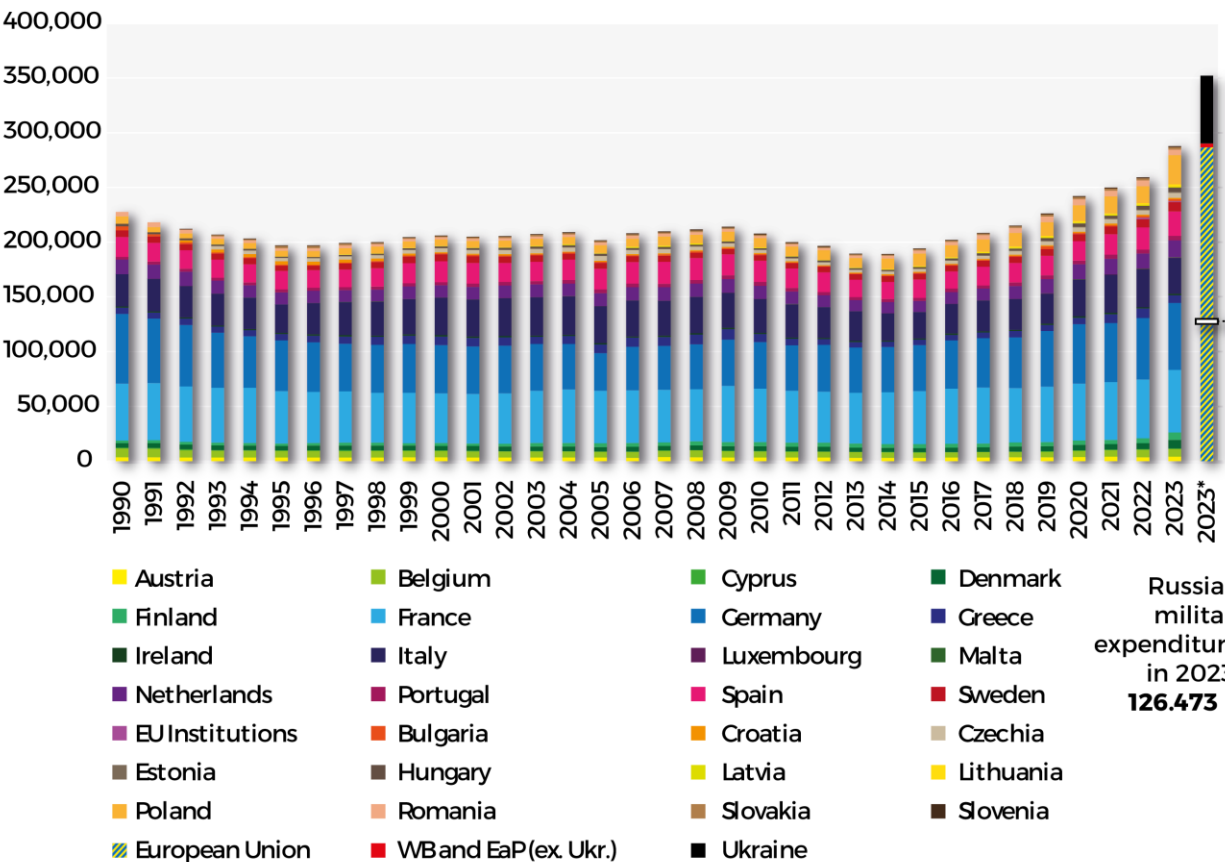
1. Only Ukraine would significantly increase EU military capabilities, but candidate countries demand the EU to act as a security provider.
2. Even before the 2022 war, Ukraine had the second largest army compared to NATO Europe and its military personal was high considering its population.
3. Investment in infrastructure remains a challenge for the whole EU and not just for the candidate countries.
4. The further reduction of green house gas emissions remains a challenge in all countries. Among the candidate countries limited economic performance contributes to lower levels of emissions.
5. WB countries, except for Albania, rely heavily on coal for energy, conflicting with EU guidelines and the Paris Agreement, potentially delaying EU accession.
6. Moldova and Georgia's energy self-sufficiency is among the lowest in the world.
7. Some WB and EAP countries hold significant reservoir of strategic raw materials that could be used to enhance EU supply chains resilience, but environmental activism could impede its development.
8. Ukraine is a significant global supplier of titanium and is a potential source of over twenty critical raw materials for the EU.

Only Ukraine would significantly increase EU military capabilities, but candidate countries demand the EU to act as a security provider

Military expenditure of WB and EaP countries (except for Ukraine). Constant (2022) US\$ m.



Military expenditure of all EU-27 countries (1990-2023) and with WB and EaP countries (2023). Constant (2022) US\$ m.

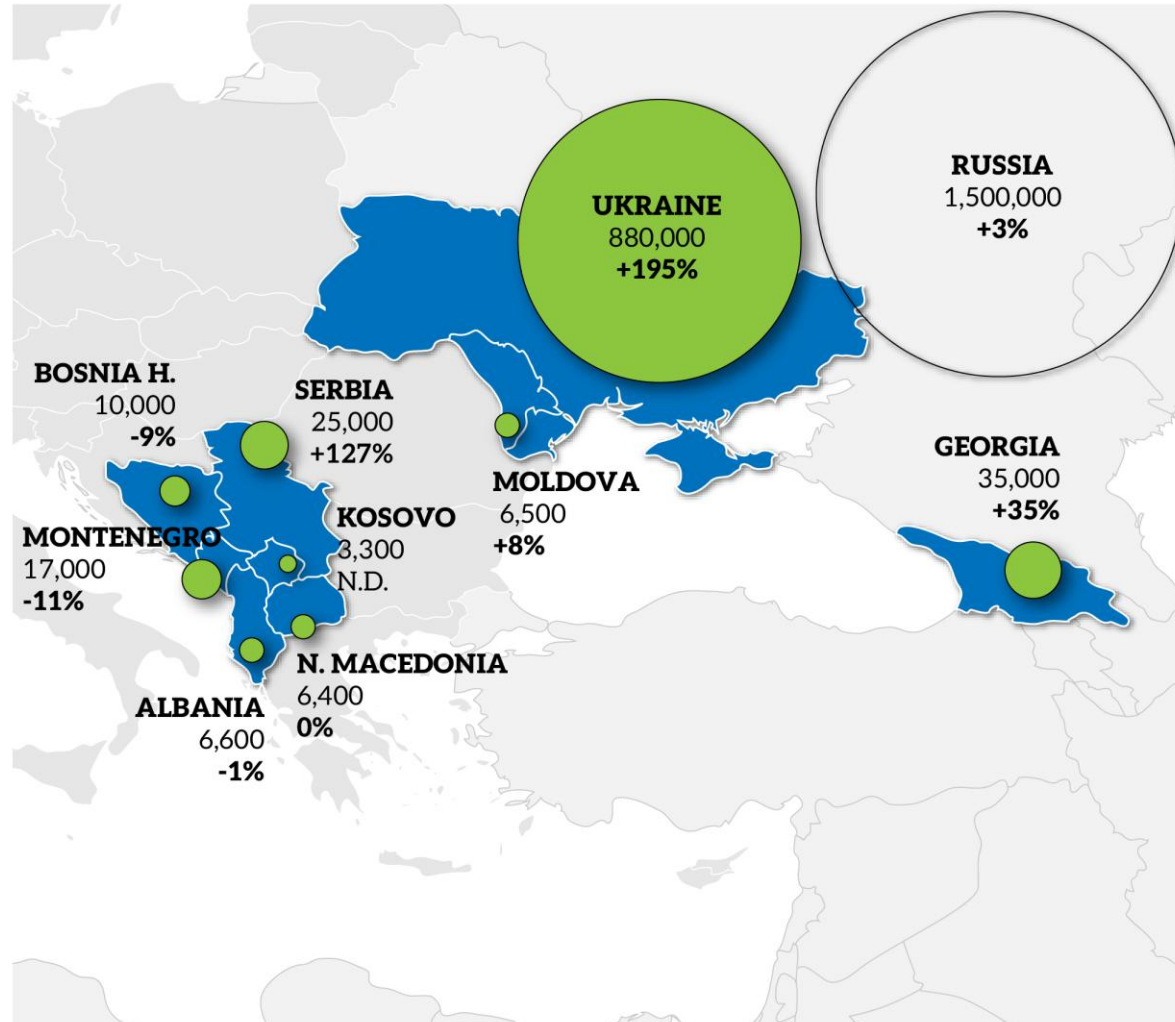


Note: between 1990-2023, data includes Ukraine.

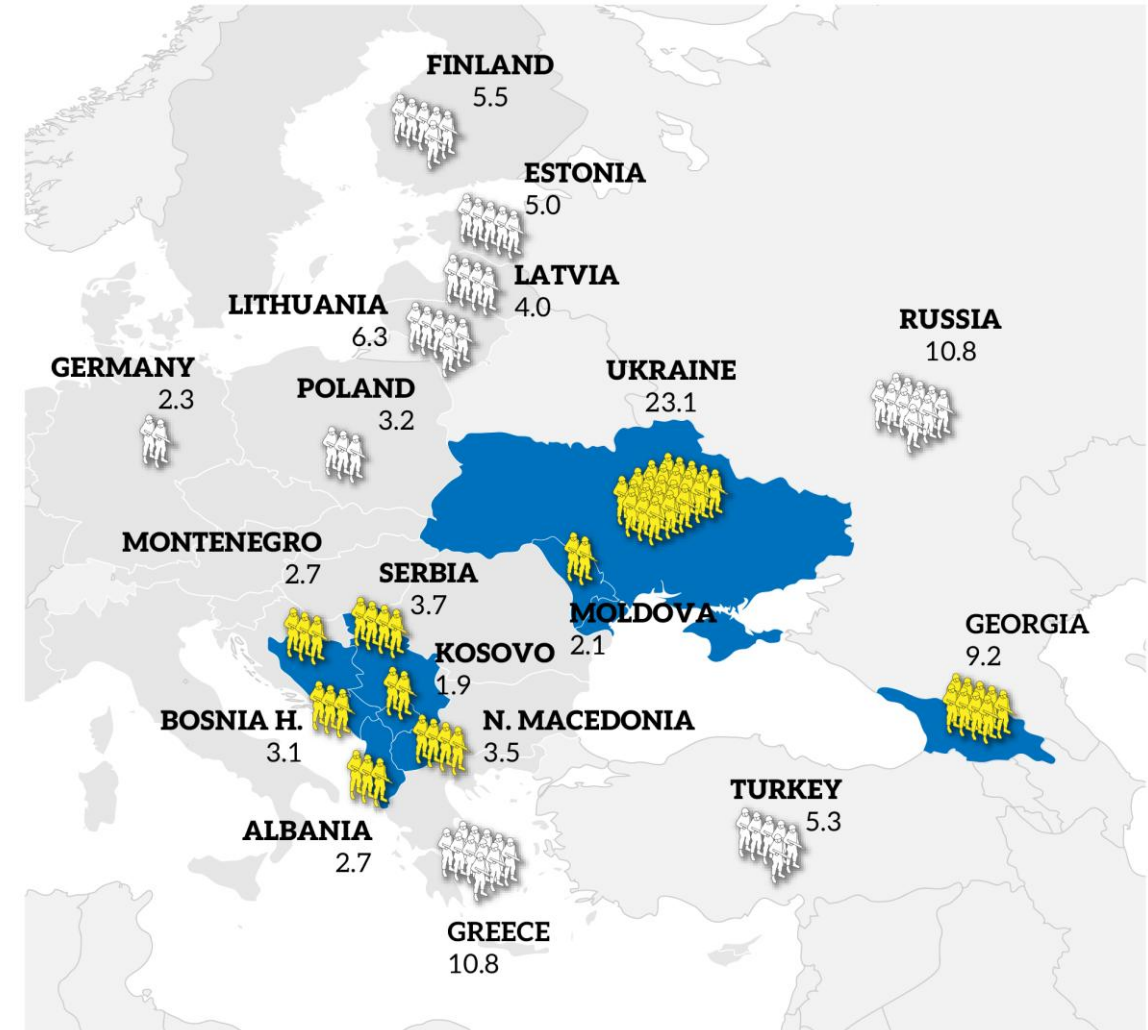
Ukraine's accession to the EU would increase the current EU military expenditure by up to 18%. Serbia, Kosovo, North Macedonia, Albania, and Moldova have increased their military spending by over 50% since 2018.

Even before the 2022 war, Ukraine had the second largest army compared to NATO Europe and its military personal was high considering its population

Military personnel in 2023, and increase since 2020



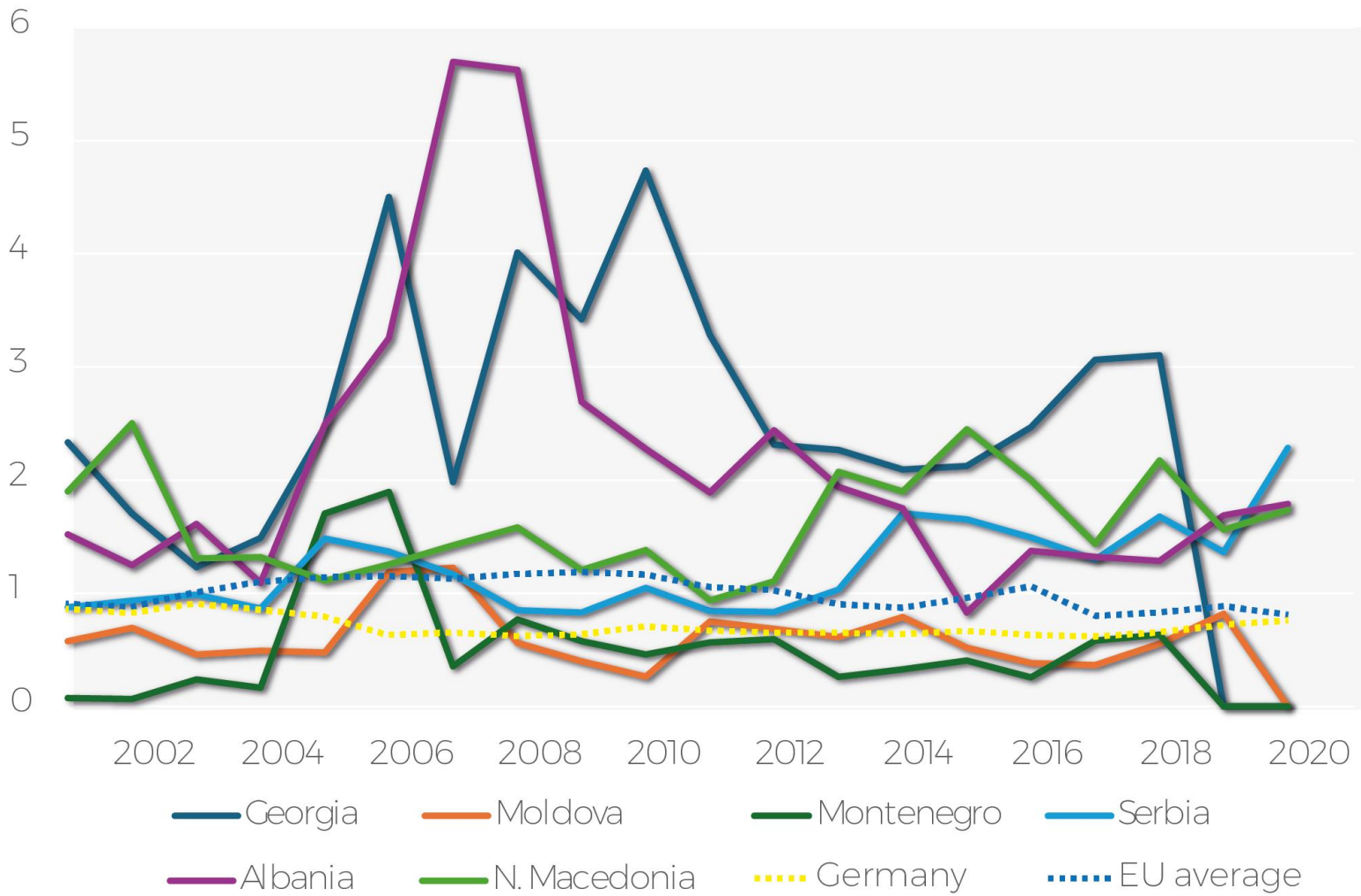
Military personnel per thousand in 2023



NATO Europe's military personnel outnumber Russia's. Ukraine and Georgia have more military personnel per thousand people than most NATO countries, except Greece.

Investment in infrastructure remains a challenge for the whole EU and not just for the candidate countries

Infrastructure investments as a percentage of GDP for all EU member states and candidate countries. Latest data available



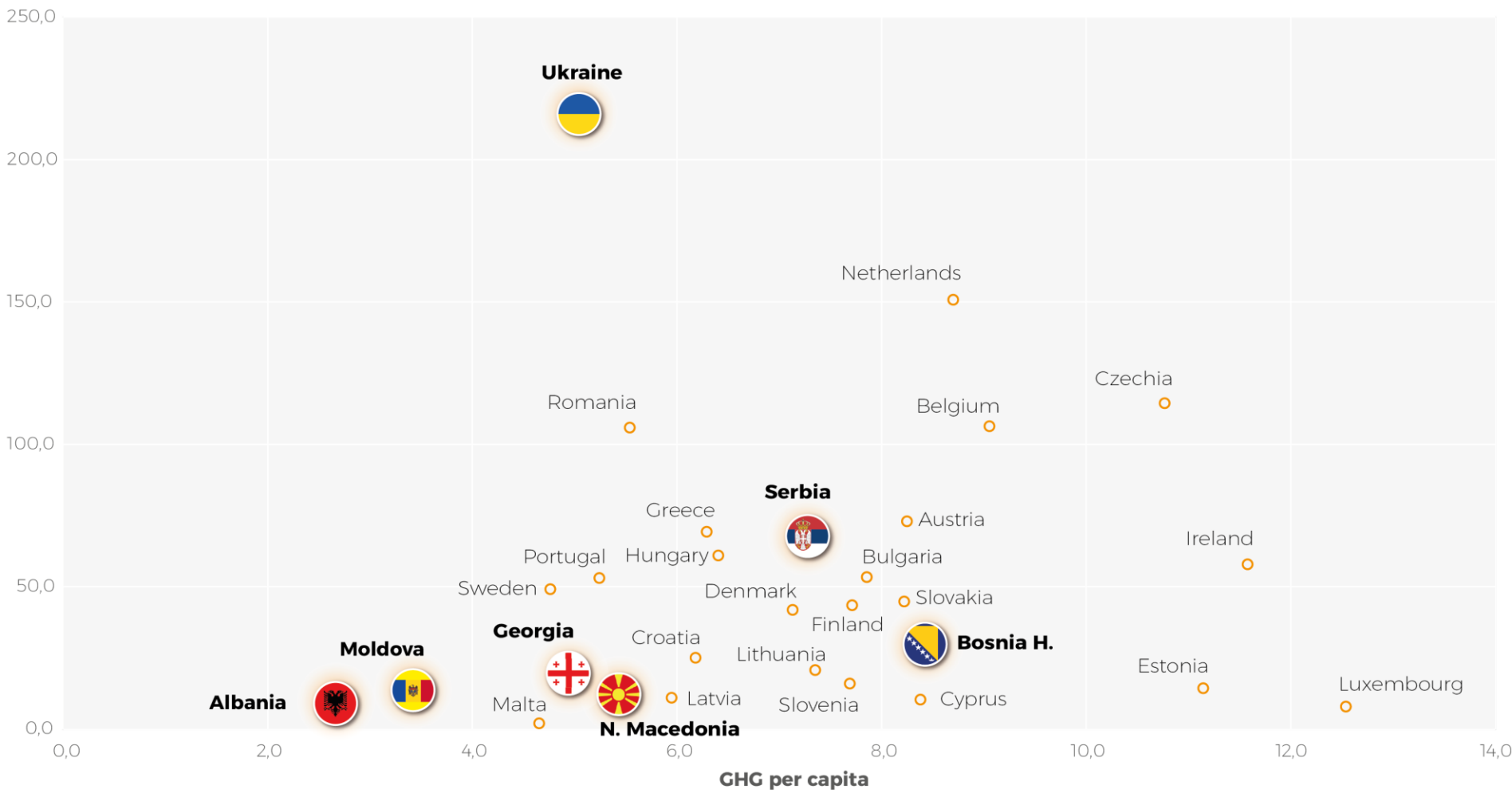
Ageing of infrastructure built after World War II, green transition of the European economy, need for increased resilience of infrastructure result in a considerable need for infrastructure investment. While investment in infrastructure varies across the EU and candidate countries, all of them need to invest more.

The structural changes that have taken place have primarily favoured the expansion of the service industry over production. Particularly problematic is the lack of adequate road infrastructure within the region, with an obvious emphasis on the lack of a functional railway network. (EP 2015)

Source: OECD.

The further reduction of green house gas emissions remains a challenge in all countries. Among the candidate countries limited economic performance contributes to lower levels of emissions

Environmental performance measured as green house gas emissions per capita for all EU member states, WB and EaP candidate countries. Green house gas emissions are measured as tonnes of CO₂ equivalent per 1,000 \$ and year (2023)

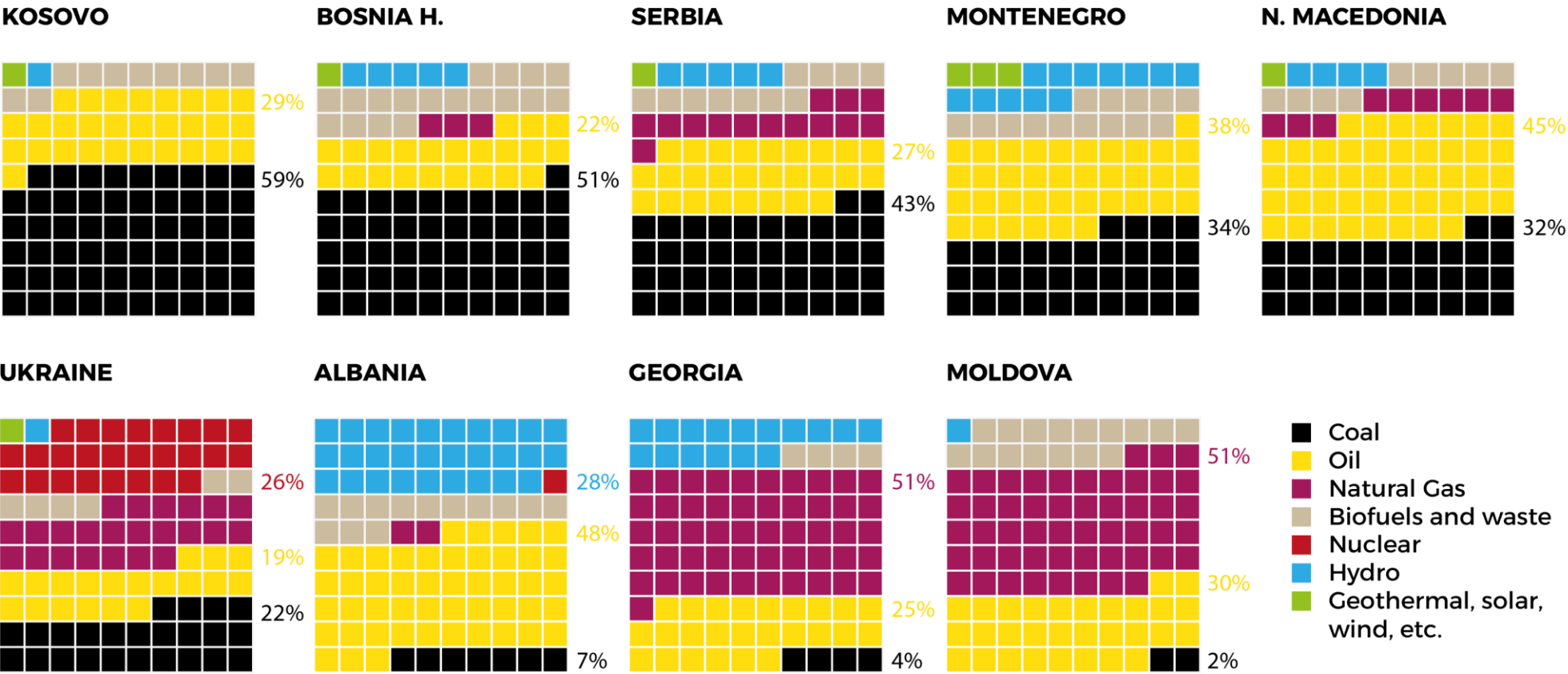


Among the candidate countries, GHG emissions per capita still depend on the economic performance, while emission reduction performance of strong economies varies considerably. The reduction of GHG emissions remains a challenge in all countries. WB and EaP country emissions per capita are below the EU average and largely depend on energy mix.

Source: GHG emissions of all world countries - JRC/IEA 2024 Report

WB countries, except for Albania, rely heavily on coal for energy, conflicting with EU guidelines and the Paris Agreement, potentially delaying EU accession

Total energy supply (% , 2022). Each square represents 1%



On average, coal accounts for 13% of the total energy supply in the EU.

Only Poland (36%), Bulgaria (31%), Czechia (28%), and Germany (18%) exceed this percentage.

Source: IEA.

Energy shortages and high electricity costs heavily impact the WB region, carrying significant political implications. The energy market is fragmented and monopolized (Frey, 2024), but governments avoid radical reforms due to potential price hikes and social unrest. According to Bechev (2023) state-owned utilities are often exploited by politicians for personal gain. The potential for renewable energy in the Western Balkans is well documented. If this potential were fully utilized, the region could even export clean electricity (Vulović, 2023).

Moldova and Georgia’s energy self-sufficiency is among the lowest in the world

Energy resilience indicators (% , 2022)

	Net energy imports (% total energy supply)	Trend in energy imports (% change 2000-2022)	Share of domestic refining in oil consumption (% , 2022)
Moldova	86.6	+18%	0
Georgia	79.6	+200%	3
N. Macedonia	63.7	+79%	0
Serbia	45.3	+308%	117
Kosovo	32.4	+170%	0
Albania	32.3	+79%	11
Montenegro	29.6	+90	0
Bosnia H.	26.4	+99%	1
Ukraine	25.2	-0,75%	0

According to latest data available, in the EU in 2022, the energy imports dependency rate was 63%. Dependency rate varied across the EU countries, ranging from more than 90% in Malta, Cyprus, Luxembourg to 6% in Estonia.

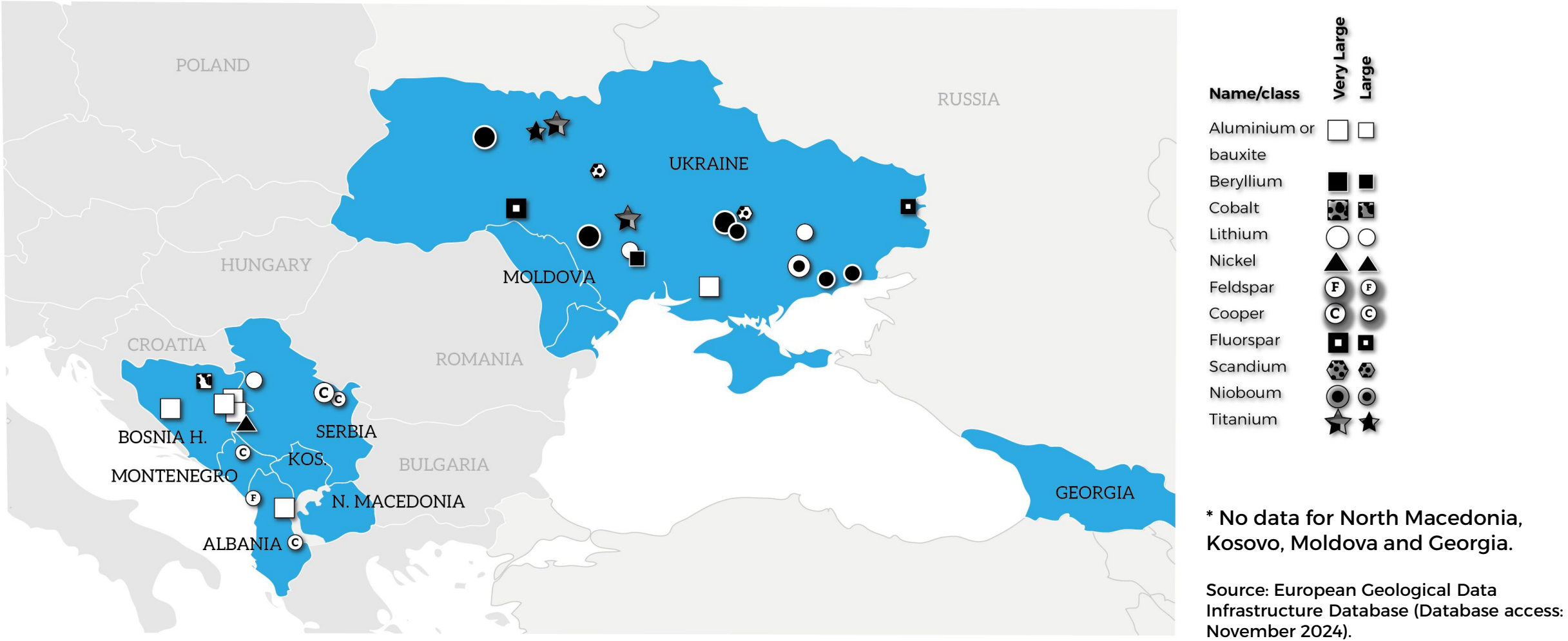
Energy dependencies on Russia exist above all in Serbia, North Macedonia and Bosnia-Herzegovina (Vulović, 2023), but the relatively minor role natural gas plays in the WB energy mix limits Russian influence in the region.

In the medium term, the Balkans could serve as a key transportation corridor for Europe's natural gas supplies, connecting EU member states with Caspian Sea countries like Azerbaijan (Morina, 2024).

Source: IEA and EU energy in figures, Statistical pocketbook 2024 .

Some WB and EAP countries hold significant reservoir of strategic raw materials that could be used to enhance EU supply chains resilience

Very large, large and medium deposits of strategic raw materials in WB and EaP countries



Environmental protests have surged in the Balkans over the past decade. Notable instances include opposition in Serbia to an EU-backed project to mine one of the greatest lithium deposits in the continent and demonstrations in Albania against hydroelectric construction on one of Europe's last wild rivers.

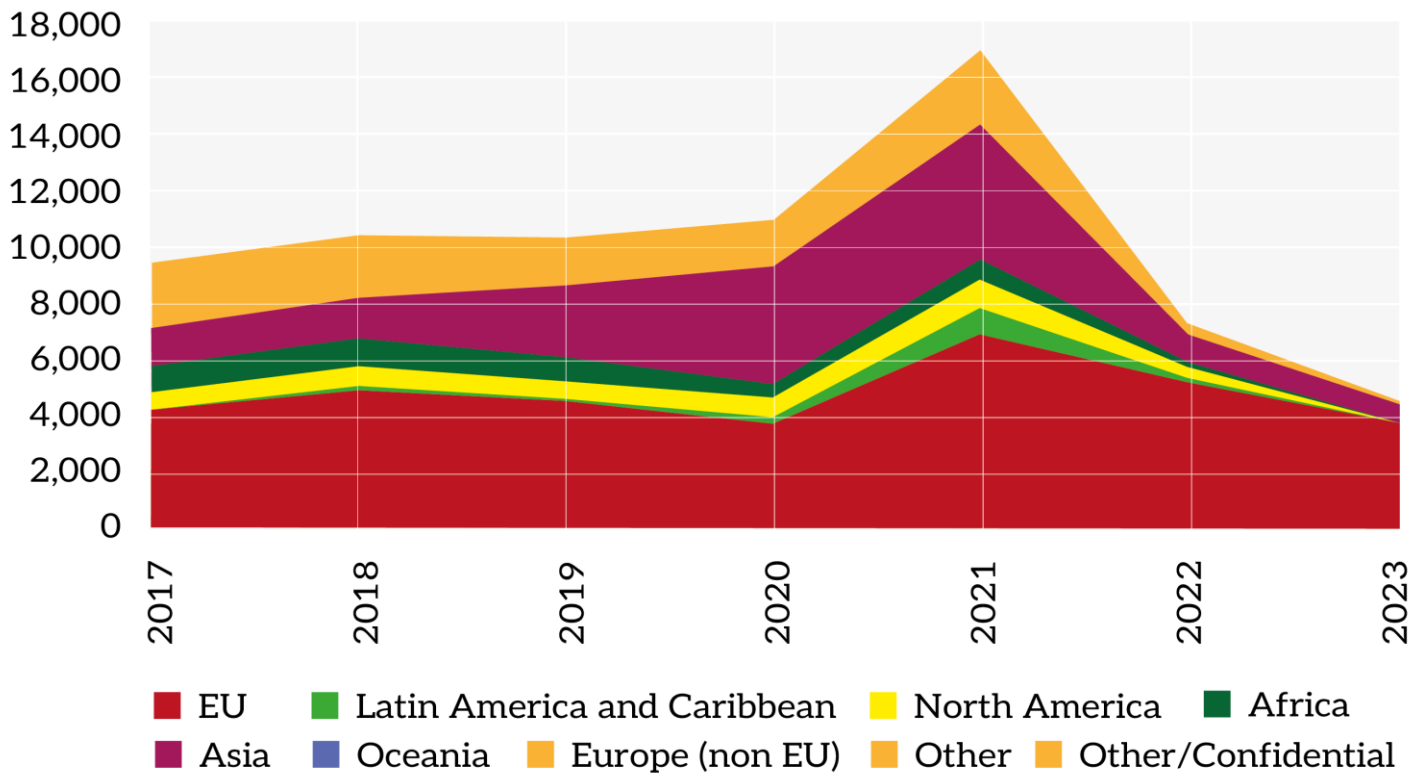
Ukraine is a significant global supplier of titanium and is a potential source of over twenty critical raw materials for the EU

Ukraine ranks 35th out of 183 countries in the Mining Contribution Index

The EU is the main destination of critical raw materials exports from Ukraine.
Destination of raw materials exports (value)

Main NFNF** materials produced at global level

MATERIAL	STAGE	RANK	SHARE
Gallium*	Refined	3th	0.9%
Silicon metal*	Refined	4th	3.4%
Titanium*	Primary	5th	6.5%
Titanium metal*	Refined	5th	2.5%
Kaolin	Primary	6th	5.7%
Iron & Steel	Primary	7th	3.1%
Manganese	Primary	7th	3.1%
Magnesium	Refined	7th	0.9%
Cooking coal*	Refined	8th	1.3%
Germanium*	Refined	8th	0.6%



* Critical raw material. ** non-food, non-fuel.

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About InvigoratEU

InvigoratEU is a Horizon Europe-funded project, coordinated by the EU-Chair at the University of Duisburg-Essen (UDE) together with the Institut für Europäische Politik (IEP) in Berlin. The project, with a duration of 3 years from January 2024 until December 2026, examines how the EU can structure its future relations with its Eastern neighbours and the countries of the Western Balkans. The consortium has received around three million euros for this endeavour.

How can the EU invigorate its enlargement and neighbourhood policy to enhance Europe's resilience?

Our first goal is to investigate how to reform the EU's enlargement strategy in a new geopolitical phase, HOW TO RESPOND to other actors' geopolitical ambitions in the Eastern Neighbourhood and Western Balkans, and HOW TO REBUILD the EU's foreign policy arsenal in view of a new era of military threats (triple "R" approach) combining the modernisation and geopolitical logics of EU enlargement, leading to new data – e.g. a public opinion survey in Ukraine, a set of scenarios, an external influence index (Russia, China, Turkey), and a social policy compliance and cohesion scoreboard.

Our second goal is to elaborate an evidence-based, forward-looking vision for the EU's political agenda and institutional frameworks for co-designing a multidimensional toolbox (i.e. two tailor-made toolkits), together with InvigoratEU's Expert Hub, Civil Society (CS) Network, Youth Labs, Workshops for Young Professionals and Policy Debates in a gaming set up, which will result in context-sensitive and actionable policy recommendations for European and national political stakeholders and (young) European citizens in particular.

Our third goal is to deploy a CDE (communication, dissemination and exploitation) strategy aiming at recommendations from Day 1 to maximize our scientific, policy and societal impact in invigorating the EU's enlargement and neighbourhood policies to enhance Europe's resilience. Ultimately, InvigoratEU is a deliberately large consortium respecting the diversity of Europe and political perspectives; 7 out of 18 are from Georgia, Moldova, Ukraine, and the western Balkans (North Macedonia, Montenegro, Serbia), complemented by our Civil Society Network of 9 representatives from all Western Balkan countries, Georgia, Moldova and Ukraine.



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