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A STRONGER EUROPE THROUGH ENLARGEMENT

INTRODUCTION

In a geopolitical environment marked by uncertainty, strategic competition, economic fragmentation and war, the European Union remains an anchor of peace, security, prosperity and democratic stability.

Enlargement has been one of the European Union's most consequential policies for promoting stability, democratic transformation and economic integration across the continent. Today, its strategic importance has grown further. A credible enlargement policy is an investment in Europe's collective security, competitiveness and resilience, strengthening the Union's capacity to protect its interests, reduce vulnerabilities and create opportunities for citizens and businesses.

Enlargement is already contributing to these objectives. Through reforms, investment and gradual integration, enlargement countries are strengthening their democratic institutions, becoming more closely integrated into the European economy and contributing increasingly to Europe's security and resilience. At the same time, closer integration with the Union brings tangible benefits before accession, including through greater economic opportunities, improved connectivity, opportunities for work, study and research and increased participation in selected areas of the single market.

Enlargement countries need to prepare for the rights and obligations of membership, while the EU needs to prepare for a larger Union capable of acting effectively and delivering on its priorities. To prepare for enlargement, the European Commission adopted a Communication[1] on how the Union can anticipate enlargement in its policies, institutions, governance and financial framework, adapting where necessary as the accession process advances. This includes ensuring that future accessions are accompanied by effective and proportionate safeguards to protect the functioning of the Union and ensure that commitments made in the accession process continue to be respected after accession.

The reporting period showed that **sustained reform efforts lead to concrete progress to EU membership** as evidenced in particular by the four frontrunners. **Montenegro**'s remarkable progress in EU accession negotiations demonstrates that enlargement remains a reality within reach. With all 33 negotiating chapters opened and 21 provisionally closed, Montenegro has made significant strides in advancing its membership preparations and, in the Commission's opinion, has met the closing benchmarks in all chapters. The country has made decisive progress on the fundamentals by achieving good results in areas such as the rule of law, economic governance, statistics and public administration reform. The work on Montenegro's accession treaty and the adoption of Council Conclusions[2] on the financial package for the accession negotiations with Montenegro confirm the country as the frontrunner in the EU's enlargement process.

Albania also made significant progress in its accession negotiations. It opened all accession negotiation clusters in just over a year, met the interim benchmarks on cluster 1 and provisionally closed the first four chapters. Albania needs to maintain the pace of reforms, ensuring speed and quality, to fulfil closing benchmarks in all chapters of negotiations.

The Republic of Moldova's ('Moldova') consistent implementation of reforms and its strong commitment to align with the EU *acquis* despite unprecedented external pressures

[1] COM(2026) 705 final
[2] 14265/26

demonstrate its readiness to advance on its EU path. All clusters have been assessed by the Commission as ready to be opened since December 2025. Clusters 1, 2, 3 and 6 were formally opened. Moldova has continued to pursue sustained reforms to prepare for the next steps in the process, particularly fulfilling the interim benchmarks for cluster 1. Maintaining the strong momentum of EU-related reforms with greater focus on implementation and enforcement will be essential.

Ukraine has shown steadfast commitment to European integration through continued reform implementation, even in the face of most difficult circumstances brought by Russia's war of aggression, which has been ongoing for more than four years. This is a testament to the Ukrainian people's resilience. Reforms have gradually continued during the reporting period, with reform momentum recently accelerating. All clusters have been assessed by the Commission to be ready to be opened since December 2025. Clusters 1, 2, 3 and 6 were formally opened.

Overall, progress across enlargement countries has remained uneven. North Macedonia has yet to fulfil the commitment it made to amend its constitution [3]. At the same time, the country has recently accelerated reforms under the Growth Plan. The Kosovo* government has been in a caretaker mode for most of the reporting period but started to deliver on the Growth Plan. Bosnia and Herzegovina, and Serbia have not progressed on the fundamentals. Türkiye remains a candidate country, and a key partner for the EU; the underlying conditions for a standstill in accession negotiations remain in place. In Georgia there has been further backsliding on the fundamentals, and the accession process remains *de facto* halted.

The credibility of the enlargement process depends on reforms being put into practice and maintained over time. Progress towards membership therefore continues to be determined by objective criteria and each country's **own merits**, with the **fundamentals setting the overall pace of accession negotiations**.

Gradual integration brings the Union and enlargement countries closer together before accession. Access to particular policies or parts of the single market depends on alignment with the EU rules, the capacity to implement and enforce them, and respect for the principles of the accession process. Gradual integration complements and reinforces, but does not replace, the accession process. The EU single market is the world's second largest economy. The opportunity to expand it through gradual integration (followed by accession) means expanding a highly successful economic model. At a time of increasing global competition, enlargement strengthens Europe's economic foundations and supports sustainable prosperity for all Europeans. Alignment with the EU Common Foreign and Security Policy (CFSP) and stepped-up cooperation on CFSP and the common security and defence policy (CSDP) is part of gradual integration logic and highlights the enlargement countries' contribution to Europe's security.

I. PROTECTING EUROPE – DEMOCRACY, SECURITY AND RESILIENCE

A **stronger Europe** starts with a safer and more resilient Europe. Enlargement strengthens the foundations of European security by extending the area in which democracy, the rule of law, fundamental rights and accountable institutions are firmly anchored. Strong **democratic institutions** and **effective rule of law systems** are not only core requirements for EU membership, they are also essential for the capacity of states and societies to withstand internal and external pressures.

At the same time, Europe's security environment has fundamentally changed. Russia's war of aggression against Ukraine and recent military escalation in the Black Sea, hybrid and

[3] Council Conclusions of July 2022 (11440/22)

* 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.

cyberattacks, foreign information manipulation and interference, organised crime, and vulnerabilities affecting critical infrastructure, as well as climate related growing risk of natural hazards, demonstrate the increasingly **interconnected nature of security**. Developments in enlargement countries can have direct consequences for the EU's security, just as closer cooperation with resilient, capable and committed partners strengthens Europe as a whole.

Enlargement countries are **increasingly contributing to addressing these common challenges**. Cooperation with the EU has intensified in areas such as foreign and security policy, defence, border management, the fight against organised crime, cybersecurity, hybrid threats, energy security, critical infrastructure, crisis preparedness and management, and civil protection. Ukraine and Moldova, in particular, have developed significant experience in responding to sustained hybrid and security threats, providing lessons relevant to the Union's own resilience and that of other enlargement countries. Ukraine is already contributing to European defence readiness through cooperation and knowledge sharing.

This security dimension complements the fundamentals of the accession process. Both dimensions reinforce and depend on each other. Democracy, the rule of law, fundamental rights, functioning democratic institutions, public administration reform and the economic criteria remain at the core of the accession process[4] and determine the overall pace of negotiations. Strengthening these foundations is indispensable for building democratic and societal resilience.

1. Democracy, rule of law and fundamental rights

Progress on the fundamentals remains essential for every enlargement country. Credible reforms require not only legislative alignment but also effective implementation, independent institutions, a strong public administration and a sustained track record of results.

During the reporting period, substantial progress was recorded in several enlargement countries, particularly where accession-related reforms benefited from sustained political commitment and broad institutional cooperation. Montenegro and Albania continued to advance reforms linked to the fundamentals, with Montenegro notably meeting the closing benchmarks for the rule of law chapters (as assessed by the Commission) and Albania meeting the interim benchmarks under cluster 1. Moldova and Ukraine pursued major reforms despite significant external pressures and, in Ukraine's case, wartime conditions. At the same time, progress remained uneven across the enlargement countries. Serious concerns persist in several countries. Democratic standards, fundamental rights and freedoms and the rule of law deteriorated further in Georgia and Türkiye.

The annual rule of law report involves Albania, Montenegro, North Macedonia and Serbia in the same preventive cycle as Member States based on objective and merit-based criteria. The exercise is complementary to the enlargement reports. It is also an element of gradual integration, and it supports reform efforts aiming to firmly and irreversibly anchor democracy and the rule of law in enlargement countries. Building on the participation of four enlargement countries, the Commission will progressively include further candidates as and when they become ready.

Democratic institutions and civil society

Stable and effective democratic institutions are central to the accession process. Democratic systems require **effective checks and balances**, strong parliamentary oversight, transparent and inclusive political dialogue and electoral processes in which citizens can exercise their choices freely.

[4] Public procurement, statistics and financial control are also part of the fundamentals of the accession process.

Overall, electoral processes were peaceful, competitive and professionally conducted. It is important for all enlargement countries to ensure alignment with relevant EU *acquis* in this area, taking into account European and international democratic standards. To address longstanding electoral integrity concerns, Bosnia and Herzegovina's October 2026 general elections introduced countrywide use of new election information and communication technologies. At the 25 October elections, which took place in an atmosphere of profound polarisation, the Serbian voters have given the next government a strong mandate for reforms. The October 2025 municipal elections in Georgia were held under deeply compromised political and electoral conditions including intimidation and pressure on independent media and civil society.

Cross-institutional cooperation facilitated the adoption and implementation of EU-related reforms in Montenegro, Ukraine and Moldova. In Albania, the Constitutional Court's active role in upholding institutional safeguards contributed to conducive conditions for reform. However, political polarisation, weaknesses in parliamentary oversight and excessive use of accelerated legislative procedures continue to affect the quality of democratic governance in some of the enlargement countries. Respect for both constitutional arrangements and implementation of decisions of constitutional courts remains essential. In Bosnia and Herzegovina and Kosovo, the functioning of the executive and legislature was hindered by political fragmentation. The dismantling of institutional safeguards continued in Georgia and Türkiye. Despite some progress in some countries, women remain under-represented in political leadership positions and continue to face gender-specific barriers to equal participation in political and public life

EU accession is most transformative where it is supported by **broad political and societal ownership**. Governments have primary responsibility for implementing reforms, but opposition parties, parliaments, local authorities, civil society, social partners, independent media and citizens all have an important role to play. Enlargement therefore requires a whole-of-society approach and sustained public engagement on the opportunities and responsibilities associated with EU membership. Young people have a vital role to play in shaping their countries' European paths. This is also being supported by enhanced communication both in the enlargement countries and in the EU Member States.

An open, enabling and inclusive environment for **civil society** is an integral part of a functioning democracy. While the required legal and policy frameworks are broadly in place in most enlargement countries, their implementation remains uneven. Progress on some matters in Montenegro, Moldova, and Ukraine is not matched in other enlargement countries. Public consultations take place in most countries, but the mechanisms behind them have limited effectiveness. Civil society organisations and independent actors continue to face smear campaigns, strategic lawsuits and administrative obstacles in some countries.

In three enlargement countries, mounting challenges have been affecting civic space, effectively limiting civil society's ability to operate freely and safely. In Serbia, civil society organisations have been subject to increasing pressure, attacks and intimidation. In Georgia, civil society operates in a repressive environment and is subject to restrictive legislation, deepening the chilling effect. In Türkiye, ongoing legal and administrative pressure from authorities and the disproportionately harsh implementation of national security laws stifles and shrinks civic space.

Public administration reform

Overall progress in implementing **public administration reforms** (PAR) remains uneven. Moldova, Montenegro and Ukraine have made good progress. Moldova relaunched the local administration reform. Montenegro adopted the Law on free access to information, the Law on local self-government, the Law on local civil servants, the Law on budget and fiscal responsibility and related secondary legislation on the Law on civil servants and state

employees for the central civil service. Ukraine has further reinforced its strategic framework with the adoption of the PAR and the public financial management system strategies for 2026-2030.

Although the strategic frameworks are broadly in place across all enlargement countries, major shortcomings persist. Political leadership and ownership of the reform agenda remain insufficient. Persistent weaknesses in linking strategic planning with medium-term budgetary frameworks continue to affect policy prioritisation and public expenditure planning. The continued politicisation of the civil service remains a critical challenge. Public consultation processes are still insufficiently institutionalised, with limited systematic follow-up and inadequate integration of stakeholder feedback into policymaking. The lack of systematic regulatory impact assessments in most countries continues to constrain evidence-based policymaking and the quality of legislative development.

All countries have put in place a broadly credible and relevant strategic framework for **public financial management.** However, progress in implementation remains insufficient, and structural weaknesses persist. This is particularly evident for budget transparency, the setting up and operationalising of independent fiscal oversight bodies and systems to ensure fiscal discipline and tax revenue performance. Structural weaknesses continued in public investment management, preparation of medium-term budgetary frameworks and a comprehensive fiscal risks monitoring. Public internal financial control systems require more effective internal audit functions and improved risk management.

Judiciary and the fight against corruption

Independent, impartial and effective judicial systems are indispensable for the rule of law, the protection of fundamental rights and a functioning market economy. They are essential for societal trust as well as for foreign investor confidence.

Several enlargement countries continued reforms aiming to **strengthen judicial independence and accountability**, including through vetting, legislative reforms and more transparent and merit-based appointment procedures. Montenegro, Moldova, and Albania continued reforms aiming to strengthen the functioning and accountability of their judicial systems. Montenegro adopted constitutional amendments, strengthening the independence of the Judicial and Prosecutorial Councils, fully in line with EU and Venice Commission recommendations. Albania completed the comprehensive vetting of judges and prosecutors. Ukraine advanced on the vetting and appointment of vetted candidates at high judiciary bodies and Constitutional Court levels. Judicial independence remains seriously weakened, especially in Türkiye and Georgia. In Serbia, the initial backsliding caused by legal amendments that removed some of the existing safeguards to protect prosecutorial autonomy and judicial independence was subsequently partly addressed.

However, political and other undue influence over judicial institutions is a concern in several countries. North Macedonia and Kosovo struggle with political or vested-interest interference with and influence over courts and prosecution services. Serbia is similarly affected, where undue pressure has significantly increased. In Bosnia and Herzegovina, the judiciary's independence and impartiality need to be improved, and legislative reforms and integrity checks are key to rebuilding public trust in the justice system. The most severe situations are in Georgia and Türkiye.

Structural weaknesses, including unfilled vacancies, backlogs, lengthy proceedings and insufficient administrative capacity, continue to undermine the effectiveness of justice systems. Access to legal aid also remains limited. Legislative reforms therefore need to be accompanied by adequate resources, merit-based selection procedures, training, institutional capacity and a sustained track record of independent decision-making. This requires high political attention and leadership.

Corruption remains a serious challenge across the enlargement region and must be addressed as a matter of priority. A credible fight against corruption requires transparency, effective public procurement systems, independent media and an enabling environment for investigative journalism and civil society. The mainstreaming of anti-corruption policies and measures across the most vulnerable sectors remains an important priority. Several countries strengthened their legal and institutional frameworks and continued to develop track records on investigations and prosecutions. Montenegro, Ukraine, Moldova and Albania registered progress. In Montenegro, prosecutorial and law enforcement institutions' effectiveness and coordination in the area of corruption continued to improve and the process to adopt two sets of amendments to the Constitution is ongoing. In Ukraine, anticorruption institutions continued to build up the track record on investigations, prosecutions and convictions in high-level anti-corruption cases, while certain priority legislative reforms to strengthen the fight against corruption remain outstanding. The risk of state capture risks remains salient, especially in Georgia, Bosnia and Herzegovina, Serbia and Türkiye.

Fundamental rights and freedom of expression

Legal frameworks for the protection of **fundamental rights** are generally in place across the enlargement countries, but implementation and enforcement remain uneven. The situation continued to deteriorate in Türkiye and Georgia. Across the region, the enforcement of human rights, including of European Court of Human Rights judgments and recommendations of international and European monitoring bodies needs to be improved, particularly in Türkiye and Georgia. National human rights institutions need more resources and greater independence. Improvements in child protection, gender equality and the rights of persons with disabilities were noted in Albania, Montenegro, Moldova and Ukraine. The rights of persons belonging to minorities continued to be generally upheld everywhere and were strengthened in Ukraine.

Montenegro and Moldova took steps to tackle ill-treatment of prisoners and made efforts to improve detention and prison conditions, but continued efforts are needed. In North Macedonia, and Türkiye, reform efforts have yet to lead to tangible results. Most countries need to respond more decisively to cases of discrimination and hate offences, in particular those targeting Roma, LGBTIQ+ persons, persons with disabilities, and minorities. This requires effective prevention, investigation, prosecution and access to remedies, alongside measures addressing the structural conditions that enable discrimination. Implementation of measures to improve gender equality is uneven. The continued incidence of gender-based violence requires increased resources for the prevention and for accessible, specialised support services for victims. The increase in anti-rights and anti-gender narratives is a challenge in several countries. In Türkiye, the recent wave of arrests and legal proceedings targeting LGBTIQ+ persons, activists, human rights associations and businesses has led to further stigmatisation and curtailed the exercise of their rights.

Efforts are still ongoing to align legislation and practice with the EU *acquis* and European standards on victims' rights and procedural safeguards for suspects and accused persons. Montenegro is a good example of considerable progress in alignment in this area.

Freedom of expression, media freedom and media pluralism remain essential indicators of democratic resilience. Some positive developments were recorded in certain enlargement countries, but intimidation, threats and attacks against journalists, including strategic lawsuits against public participation, political influence over media, concentration of media ownership and weaknesses in the independence of regulatory authorities remain of concern in others. Montenegro has continued to progress in this area, further aligning with EU standards and implementing a zero-tolerance policy to intimidation and violence against journalists. Moldova adopted a new media law on transparency, including in relation to media ownership,

consistent with the European Media Freedom Act[5]. Positive developments were also recorded in other countries, particularly Ukraine. Further efforts are needed to align legislation and practice with the EU *acquis* and European standards. The safety of journalists remains a concern in several countries and has further deteriorated in Serbia, Georgia and Türkiye. A credible track record of effective and systematic follow-up by law enforcement and judicial authorities is essential. Independent and pluralistic media are also increasingly important for strengthening societies' resilience against foreign information manipulation and interference. In Serbia, a further erosion of academic freedom and the freedom of scientific research was noted, with authorities increasing pressure and interference on university students, and research institutes.

2. Internal security, borders and migration

Effective cooperation on **internal security** protects citizens in both the Union and enlargement countries. Organised crime, trafficking in human beings, drug trafficking, migrant smuggling, money laundering, violent extremism, radicalisation, terrorism and cybercrime are inherently cross-border challenges and require coordinated responses and effective cooperation. In today's security environment, the ability and commitment of enlargement countries to address internal security threats ranging from hybrid attacks to organised crime and terrorism, is essential.

Efforts to strengthen the **fight against serious and organised crime** delivered results. Montenegro and Albania's specialised prosecution offices achieved results in investigating and prosecuting high-risk criminal networks. Ukraine, Moldova and Bosnia and Herzegovina each issued a new national Serious and Organised Crime Threat Assessment. Albania adopted new strategic frameworks to fight organised crime. Shortages in human resources and equipment remain an issue across enlargement countries, and integrity measures across all law enforcement agencies need to be strengthened.

Cooperation among enlargement countries, EU Member States and EU agencies continued to deepen. Several partners strengthened their specialised law enforcement and prosecution capacities and intensified their **operational cooperation**, including through EMPACT (the European Multidisciplinary Platform Against Criminal Threats). These efforts have contributed to the investigation and prosecution of organised criminal networks.

Further progress is nevertheless needed to consolidate track records of investigations, prosecutions, convictions and confiscation of criminal assets. Some enlargement countries have regularly used financial investigations and asset recovery, but a systematic follow-the-money approach should become standard practice. Capacity to investigate cybercrime, cryptocurrency-related crime and complex financial crime also needs to be strengthened further. Montenegro, Albania, Türkiye and Moldova have taken steps to strengthen their **anti-money laundering and countering the financing of terrorism** framework. Although money laundering is increasingly recognised as a stand-alone offence, prosecutions and convictions in such cases remain scarce. Serbia, Türkiye and Bosnia and Herzegovina have been recently assessed by the **Financial Action Task Force (FATF) and Moneyval**. These countries should prioritise implementing the Key Recommended Actions – or, in Bosnia and Herzegovina's case, fully commit to its FATF action plan to address the identified strategic deficiencies that have led to its inclusion in the FATF list of jurisdictions under increased monitoring.

Drug trafficking remains the most common activity of organised criminal groups operating across enlargement countries. Drugs seizures have tended to increase, and it is essential that all enlargement countries ensure a timely destruction of any confiscated drugs. Albania, Montenegro and Moldova made further progress in aligning their legislation with the EU *acquis* on drugs, while additional efforts are needed in Bosnia and Herzegovina, Kosovo and North

[5] European Media Freedom Act

Macedonia. Albania, Bosnia and Herzegovina, North Macedonia and Serbia should also adopt a comprehensive national drugs strategy and action plan against drug trafficking. Ukraine should further align its legislative and institutional framework with the EU *acquis* on drugs.

Some good results were achieved in dismantling networks involved in **trafficking in human beings**. In Montenegro, the track record of prosecutions and convictions in this area continued to improve. Progress has been made in combating all forms of trafficking in human beings, particularly forced labour and forced begging. However, stronger mechanisms are needed for identifying, protecting, helping, compensating and reintegrating victims. Investigations into **child sexual abuse** and identification and support to victims also need to be strengthened.

Enlargement countries are implementing their national strategies, roadmaps, and action plans on **small arms and light weapons**. **Terrorism, violent extremism and radicalisation** are particular security challenges. Enlargement countries continued to strengthen their counterterrorism and prevention frameworks. Cooperation with EU agencies and international partners also remained robust, and law enforcement capacities were generally effective. However, new challenges are emerging, including online radicalisation, terrorist content online, disinformation and the misuse of new technologies, including AI, and the growing influence of ethno-nationalism and political extremism.

Migration and border management remain areas of close cooperation, and continued to deliver results. Irregular border crossings from the Western Balkans to the EU have not increased, reflecting strengthened cooperation and border-management capacities. Cooperation with Frontex and implementation of the EU Action Plan for the Western Balkans contributed to these results. In 2025, the substantial decrease in the number of irregular arrivals to the EU from Türkiye that had been recorded in 2024 continued. The EU continued to support Türkiye in its significant efforts to host 2.3 million refugees, mainly from Syria.

Further alignment with the EU's **visa policy** remains necessary, alongside strengthened asylum and return systems and preparations to implement European integrated border management and, ultimately, the Schengen *acquis*. Montenegro amended its visa policy to fully align with the EU list of visa-required third countries as of 31 October 2026 and North Macedonia achieved almost full alignment, but other partners, especially Bosnia and Herzegovina, Georgia, Kosovo, and Serbia, must accelerate their efforts. Pending their full alignment with the EU's visa policy, other enlargement countries should ensure a rigorous screening of visa-exempt third-country nationals to prevent any security or illegal migration risk towards the EU. The investor citizenship scheme functioning in North Macedonia should be discontinued without delay. Serbia should put an end to the practice of granting citizenship under accelerated or simplified procedures to nationals of countries that pose illegal migration or security risks to the EU.

Asylum procedures should be further aligned with the EU *acquis*. This should include adequate procedures and protection for unaccompanied minors and vulnerable people.

Enlargement countries should also start aligning with the legislative instruments that are part of the **Pact on Migration and Asylum**[6]. It is crucial that all enlargement countries continue to strengthen their capacities to follow the principles defined in the **European integrated border management**, as well as those connected with a stronger **Schengen governance**. This includes strengthening capacities to implement the customs legislation in view of the progressive application of the amended Union Customs Code[7].

The **fight against migrant smuggling** improved. All Western Balkan partners, Moldova and Ukraine continue to actively take part in the Global Alliance to Counter Migrant Smuggling. The

[6] Pact on Migration and Asylum
[7] Regulation (EU) 2026/2108

countries should develop a comprehensive approach to **labour migration** that prevents irregular secondary movements to the EU.

Enlargement countries should take measures without delay to reduce the number of **unfounded asylum applications** from nationals of these countries in the EU. Countries should continue to implement the readmission agreements with the EU and build capacity for returns, in line with fundamental rights.

Security and resilience

Foreign information manipulation and interference, cyberattacks and other hybrid threats are increasingly targeting democratic institutions, elections, public trust and the accession process itself. Strengthening resilience against these threats is therefore both an accession priority and a shared European security interest.

Preparedness remains uneven across the enlargement region. Moldova and Ukraine have developed increasingly comprehensive approaches to fighting foreign interference, strategic communication, cybersecurity and electoral resilience in response to sustained hostile activity. EU CSDP missions in Ukraine and in Moldova are supporting capacity building and providing advisory support to sustain those efforts. Other enlargement countries, such as Montenegro, have also strengthened institutional arrangements and cooperation with the EU.

Election integrity requires permanent preparedness rather than temporary measures limited to electoral periods. Independent institutions, pluralistic media, an informed public and an active civil society are central to this effort. Enlargement countries should therefore continue strengthening their capacity to detect, analyse and respond to foreign interference and disinformation while safeguarding freedom of expression and other fundamental rights.

The **European Democracy Shield** and the European Centre for Democratic Resilience provide additional opportunities to strengthen cooperation among Member States and enlargement countries. On 13 October 2026, Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, North Macedonia, Serbia and Ukraine were associated with the European Centre for Democratic Resilience. Participation should support exchanges of expertise, operational cooperation and capacity-building, while being tied to clear commitments to democratic principles and resilience.

Cybersecurity, the protection of critical infrastructure, civil protection and preparedness are equally important. European energy, transport, digital and communications networks are increasingly interconnected, meaning vulnerabilities outside the Union can have direct cross-border consequences. Gradual alignment with EU standards, preparedness capacities and stronger crisis management across both natural and human-induced risks as well as closer operational cooperation can reduce these vulnerabilities and strengthen the resilience of shared networks and reinforce societal resilience.

3. Foreign, security and defence policy

Alignment with the EU's **common foreign and security policy** (CFSP) is a strong signal of a candidate country's strategic orientation. Full CFSP alignment, including implementation of EU sanctions is a key requirement for membership. This includes taking measures to prevent circumvention of EU sanctions. A number of enlargement countries benefit from capacity-building under the European Peace Facility.

Most enlargement countries maintained a full or high alignment rate with the CFSP during the reporting period. Albania, Bosnia and Herzegovina, Montenegro and North Macedonia continued to be fully aligned. Kosovo's full alignment with the CFSP is reflected in the dedicated Chapter 31 of the annual report for the first time. Ukraine and Moldova maintained very high levels of alignment. By contrast, Serbia's alignment remained low, while Georgia's alignment declined further. While Türkiye increased the number of consultations and its

cooperation with the EU on a number of regional and international security issues, it continued to maintain a very low alignment rate.

Beyond CFSP alignment, enlargement countries are increasingly contributing to the **EU's common security and defence policy** (CSDP). They participate in EU crisis-management missions and operations, contribute to European security and benefit from closer cooperation through a range of instruments. Security and Defence Partnerships with several enlargement countries provide structural frameworks for enhancing security and defence cooperation across a wide range of areas.

Ukraine's contribution is of particular significance. Cooperation between the EU and Ukraine on security and defence has deepened substantially[8] since Russia's full-scale invasion. The gradual and future full integration of Ukraine's defence industrial capacity into the EU defence technological base can contribute to strengthening both Ukraine's defence and Europe's long-term defence readiness and preparedness, industrial capacity and technological innovation. Ukraine is increasingly associated to EU instruments and programmes enabling practical cooperation and joint projects, such as Security Action for Europe, the European Defence Fund, BraveTech EU and European Defence Industry Programme, and participates in European Defence Projects of Common Interest. The EU will continue to support Ukraine military needs through the defence window of the Ukraine Support Loan.

These developments show that enlargement countries are already contributing to European security. At the same time, deeper security and defence cooperation must remain anchored in and be aligned with the Union's values, foreign policy objectives and accession requirements.

Upholding international law, including the Rome Statute of the International Criminal Court, is central to the Union's values.

II. GROWING EUROPE – COMPETITIVENESS, INVESTMENT AND OPPORTUNITY

Europe's prosperity depends on its ability to compete, innovate and create opportunities in a rapidly changing global economy. Enlargement contributes to Europe's economic strength by gradually creating a larger, more integrated and more dynamic economic space, increasing EU's weight on a global stage. Economic reforms, investment and gradual integration are bringing enlargement countries closer to the EU single market, European value chains and investment flows.

Evidence from previous rounds of enlargement underlines the scale of the opportunity: an International Monetary Fund (IMF)[9] analysis revealed that GDP per capita in the countries that joined the EU in the 2000s was 34% higher after 10 years, and 47% higher after 15 years than on a modelled path without accession. The analysis also points to gains for existing Member States, while noting that its model covers them less comprehensively. These estimates illustrate the combined effects of reform, improved governance, market integration and investment, but they are not a forecast of the outcome for every enlargement country.

The economic potential is significant, but convergence remains incomplete. The IMF[10] estimates the Western Balkans and Moldova could achieve GDP-per-capita gains of around 30-35% over 10 years through reforms, deeper market integration and EU investment. The **overall macroeconomic picture is mixed**. In 2025, economic growth in many enlargement countries was weaker than expected. In the Western Balkans, annual growth slowed to 2.6%, down from 3.6% in 2024, mainly because of a sharp slowdown in Serbia, the region's largest economy. North Macedonia was the only Western Balkan economy where growth accelerated.

[8] The EU-Ukraine defence industrial partnership, and Drone Deal, adopted in July 2026.
[9] IMF report - Bridging Borders: Making the Most of EU Accession
[10] See footnote 9

Growth ranged from 2% in Serbia to 3.7% in Albania. In 2025, Moldova's economy grew by 2.4%, supported by a recovery in agriculture and higher IT exports. However, this growth did not carry into 2026 as the country's vulnerability to external energy shocks, repeated energy and environmental emergencies, and a weak export base, continued to weigh on economic growth. In Türkiye, growth reached 3.6%, driven mainly by strong domestic demand, and was higher than in 2024. Growth remained strong in Georgia at 7.5%. In Ukraine, growth slowed to 1.8%, largely because of continued Russian attacks on energy infrastructure. The Black Sea blockade has further disrupted trade routes, leading to loss of domestic revenue. Inflation remained persistent in most economies.

Current account balances deteriorated in most countries in 2025. Exports were weak amid global headwinds while strong domestic demand kept import levels high. Attracting foreign direct investment into tradable sectors remains difficult as investment often goes to non-tradable sectors such as real estate. In addition, Russia's war against Ukraine heavily weighs on the business environment not only in Ukraine but also in neighbouring Moldova, where heightened geopolitical uncertainty and elevated risk perceptions are adversely affecting investor sentiment and FDI inflows.

Banking sectors remained stable in 2025, and credit growth generally accelerated, supported in several countries by stronger household borrowing for housing and consumer spending. Across the enlargement countries, banks continued to show solid capital adequacy ratios, ample liquidity and low non-performing loan ratios.

Overall, general government balances deteriorated in 2025 compared with the previous year, although most countries performed better than their budget targets. Revenue collection has increased. At the same time, expenditure was often lower than planned, mainly because capital spending was under-executed. As a result, fiscal deficits were smaller than expected in several countries. Common fiscal challenges across the countries include narrow revenue bases, weaknesses in public investment management, gaps in fiscal governance and, in some cases, moderate to high public debt.

All economies face similar structural barriers to higher productivity and sustainable long-term growth. In most of them, corruption, legal uncertainty and slow court procedures continue to undermine the business environment. Weak regulatory and institutional frameworks hold back private-sector development, and insufficient investment in research and innovation further constrains competitiveness and productivity growth. Large and inefficient state-owned enterprises distort competition and weigh on growth. A large informal sector further weakens competition and reduces tax revenue, limiting the resources available for investment in education, culture, healthcare and infrastructure. Meanwhile, the green transition has become more urgent as it is both a challenge and an opportunity for sustainable growth. Labour market outcomes have improved in many economies, with employment rising, but participation remains low overall, especially among women, and unemployment is still relatively high, and capacity on social dialogue remains weak. Discrimination and inequalities pose structural obstacles to labour market participation and prevent the economies from making full use of available human capital.

The EU supports economic transformation through reforms, investment and gradual integration. The Growth Plans for the Western Balkans and Moldova and the Ukraine Facility link substantial financial support to reforms that prepare countries for EU membership. In parallel, gradual integration can open selected areas of EU policies and the single market before accession subject to certain conditions, strengthening convergence and the Union's own preparedness for a larger membership.

1. Accelerating economic and social convergence through reforms and investment

Economic convergence is essential for enlargement to be a success. Stronger economies and functioning market institutions enable enlargement countries to compete effectively within the single market and contribute to the Union's prosperity after accession. The IMF analysis of previous rounds of enlargement attributes roughly two thirds of estimated income gains to higher productivity. It identifies mutually reinforcing sources of growth, namely better governance, rule of law and regulation, single market integration and EU funding and investment.

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*. 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.

The Growth Plans and their respective facilities - the **Reform and Growth Facility for the Western Balkans**[11], **the Reform and Growth Facility for the Republic of Moldova**[12] and **the Ukraine Facility**[13] strengthen the link between reforms, investment and economic integration. They support structural reforms in areas including the business environment, public administration, energy, digitalisation, human capital and the green transition, while mobilising public and private investment. Improved governance and the rule of law reduce uncertainty for investors; stronger links to the single market support scale and participation in European value chains; and EU-backed investment can help close infrastructure gaps and draw in private capital.

In the Western Balkans, all partners adopted Reform Agendas, and financial support under the **Reform and Growth Facility for the Western Balkans** was linked to the delivery of agreed reform steps. By September 2026, 673.6 million have been released out of the 6 billion available under the Facility following the completion of 90 out of 731 reform steps. Implementation needs to accelerate, with particular attention to reforms that improve economic governance, strengthen the rule of law and the business environment, and support convergence with the single market[14].

The EU rolled out WiFi4WB, preparing the installation of free Wi-Fi hotspots in around 500 municipalities across the region to foster digital connectivity and inclusion. The first regional EU-Western Balkans Investment Forum mobilised investors around reform and investment priorities. These measures complemented ongoing pre-accession assistance under the **Instrument for Pre-accession Assistance** (IPA III) and participation in EU programmes such as Horizon Europe, Erasmus+ and Creative Europe.

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. The CRM facilitates movement, recognising professional and academic qualifications, digitalising procedures and strengthening customs cooperation. Full implementation of existing commitments remains crucial. A well-functioning regional market based on EU rules can generate economic benefits for the region while helping businesses prepare for competition in the single market.

The **Reform and Growth Facility for Moldova**, amounting to EUR 1.9 billion, is supporting an ambitious reform and investment agenda and closer economic integration with the Union. The amount is composed of EUR 1.63 billion that are conditional to the implementation of the

[11] Regulation (EU) 2024/1449
[12] Regulation (EU) 2025/535
[13] Regulation (EU) 2024/792
[14] More information - Reform and Growth Facility for the Western Balkans - Enlargement and Eastern Neighbourhood

Reform Agenda and unconditional complementary support worth EUR 250 million for 2025-2027. Moldova continued implementing its Reform Agenda and benefited from a gradual participation in areas of the single market and EU programmes. By October 2026, EUR 660.8 million out of EUR 1.63 billion in grants and loans available under the Facility had been released following the completion of 46 out of 48 reform steps scheduled until June 2026 and overall 153 steps for 2025-2027. Sustained implementation while stepping up the implementation of public investments will be essential to turn financial support into long-lasting economic convergence and increased resilience[15].

The **Ukraine Facility** provides over EUR 50 billion of stable financing (across the three Pillars), in grants and loans, to support Ukraine's recovery, reconstruction, and modernisation for the period from 2024 to 2027. The amount of Pillar 1 of the Ukraine Facility received an increase of EUR 8.4 billion in financing for 2026 following the adoption of the Ukraine Support Loan[16]. A total of EUR 32.5 billion has been disbursed so far under Pillar 1. The Ukraine Plan continued to support reforms necessary for accession, reconstruction and private-sector development in the country. Despite the exceptional circumstances created by Russia's war of aggression, Ukraine continued to adopt reforms that aim to strengthen economic governance and support its gradual integration into the EU economy. Reconstruction and accession preparations should continue to reinforce each other, ensuring that investment contributes to a competitive, sustainable economy that is increasingly integrated into European markets[17].

EU-backed investment platforms, including the Ukraine Recovery Conference, the EU-Moldova Investment Conference and the EU-Western Balkans Investment Forum, have helped connect reform and investment priorities with businesses, international financial institutions and investors. Mobilising significantly more private capital will be needed to close the investment and productivity gaps with the EU.

Improving the investment climate remains critical. Legal uncertainty, corruption, weaknesses in public administration and judicial systems, inefficient state-owned enterprises and large informal sectors continue to discourage productive investment in several enlargement economies. Tackling these structural constraints is essential both for economic convergence and for successful participation in the single market.

2. Integrating into the single market before accession

Gradual integration is already delivering tangible benefits for citizens and businesses while supporting preparations for membership. It is part of a wider approach to enlargement preparedness: as candidates gradually align with EU rules and implement them, the Union can anticipate the implications of a larger membership across its policies and instruments.

Progress during the reporting period was particularly visible in telecommunications, payments, customs, taxation, digital services, energy and industrial products. These initiatives combine concrete benefits with regulatory convergence. Participation is conditional on alignment with relevant EU rules, effective implementation and enforcement, and the capacity to safeguard the functioning of the single market.

The extension of the EU's **Roam Like at Home** area to Ukraine and Moldova since January 2026 has removed roaming charges and brought immediate benefits to citizens and businesses. Work is advancing on extending the scheme to the Western Balkans.

Integration into the **Single Euro Payments Area (SEPA)** is another major example of this gradual approach. Albania, Moldova, Montenegro, North Macedonia and Serbia have entered the geographical scope of SEPA schemes following a decision of the European Payments

[15] More information - Reform and Growth Facility for Moldova - Enlargement and Eastern Neighbourhood
[16] The budget support under the Ukraine Support Loan is also channelled through macro-financial assistance.
[17] More information - Ukraine Facility - Enlargement and Eastern Neighbourhood

Council, with payment service providers gradually joining its schemes. This facilitates faster and less costly euro payments and requires alignment with major EU financial-sector legislation, including anti-money laundering and counterterrorist financing requirements. Bosnia and Herzegovina, Kosovo and Ukraine should continue, complete and implement the reforms required to meet the conditions for integration into SEPA.

Customs cooperation is similarly crucial for facilitating trade and protecting the Union's financial and security interests. Enlargement countries continued to align customs systems, strengthen risk management and gradually participate in European customs arrangements, including the Common Transit Convention (CTC). While current CTC members successfully upgraded to the latest version of the New Computerised Transit System (NCTS), Albania and Bosnia and Herzegovina made further progress towards joining CTC in the next years. The integration of enlargement countries in CTC brings significant benefits, such as reduced customs controls and faster clearance times, and strengthens the countries' capacity to prevent and detect non-compliant trade flows. The Commission calls on Serbia to lift its veto to Kosovo's application to become an observer to the CTC. Coordination and adjustment of tax systems is necessary for the good functioning of the single market and to avoid distortion of competition. Further digitalisation and interoperability of customs systems will be essential for accession preparedness. **Energy-market integration** is progressing in parallel, building on the Energy Community Treaty as the main framework for the integration of enlargement countries' energy markets with the EU. Closer integration of enlargement countries into European electricity and energy markets strengthens energy security, facilitates investment in renewable energy and infrastructure and reduces strategic dependencies. Ukraine and Moldova have made particularly significant progress in integrating their energy systems into the EU and in reducing dependence on Russian energy.

3. Connecting Europe

A larger Union will require stronger physical, energy and digital connections. **Connectivity is** therefore both **an economic opportunity and a requirement** for enlargement. Regional connectivity remained high on the agenda through cooperation in the areas of transport, energy and digital technologies in the Western Balkans, Türkiye and the Black Sea region.

The EU continued investing in transport links that connect enlargement countries with the single market and with each other. In the Western Balkans, Moldova and Ukraine, the Transport Community supported regulatory alignment and measures to facilitate transport across the region and with neighbouring Member States. Green Lanes and work on the busiest border crossing points aim to reduce waiting times, facilitate trade and boost the resilience of transport corridors.

The **EU-Ukraine Solidarity Lanes** continued to provide essential routes for Ukraine's exports and imports and strengthened transport connections between Ukraine, Moldova and the Union. Their importance has increased following massive attacks by Russia on Ukraine's ports and land infrastructure since this summer, which have had a negative impact on freedom of navigation, with global consequences. Enhancing the cooperation on the Danube and Black Sea corridors is critical not only for Ukraine, but also for European trade, and economic resilience, as well as global food security.

Connectivity has an increasingly significant geopolitical dimension. The European Transport Corridors provide the long-term strategic transport framework for strengthening connectivity, resilience and links to neighbouring countries, including the Baltic Sea - Black Sea - Aegean Sea Corridor. Under the **connectivity agenda** launched as part of the EU Black Sea strategy, the EU and regional partners are strengthening transport, energy, digital and trade links between Europe, the Black Sea region, the South Caucasus and Central Asia. The Trans-Caspian Transport Corridor creates opportunities to diversify trade routes and strengthen Europe's connections with Central Asia and can reduce vulnerabilities from concentrated or

insecure transport routes. In her 2026 State of the Union address, President von der Leyen announced an ambition to mobilise up to EUR 12 billion in public and private investment through the Global Gateway for the Middle Corridor and a Regional Connectivity Summit.

Transport infrastructure should increasingly be developed with both civilian and security requirements in mind. Improving cross-border infrastructure, interoperability and transport capacity can support trade and mobility and contribute, where relevant, to military mobility and wider European preparedness. The development of transport infrastructure should go hand in hand with the facilitation of customs procedures and digitalised transit.

Digital connectivity is equally important. Enlargement countries continue to develop digital public services and digital identity frameworks aligned with EU standards. European Digital Innovation Hubs and cooperation on high-performance computing and AI are helping businesses and public administrations develop the capabilities needed for the digital transition. The European Innovation and Technology Institute is present in the Western Balkans and Ukraine through Community Hubs. More hubs will open in Moldova and Kosovo by end-2026.

Further investment will be required to close infrastructure gaps, improve cross-border connections and ensure that transport, energy and digital networks are resilient, secure and interoperable with those of the Union.

4. Strengthening European value chains and economic security

Enlargement can contribute to the Union's competitiveness and economic security by diversifying supply and value chains, building common resilience through mutual dependencies among partners, expanding industrial capacity and integrating complementary resources and capabilities into critical European value chains.

Work is continuing to integrate enlargement countries more closely into **EU industrial supply chains**. Regulatory alignment, agreements on conformity assessment and closer industrial cooperation can lower barriers for businesses and ensure that products meet EU standards. The process leading to start negotiations of an agreement on conformity assessment and acceptance of industrial products with Ukraine is well on track. Moldova is implementing an action plan to this effect, and preparatory work started with Serbia. The Commission has proposed a framework for the gradual integration of the Western Balkans, Ukraine and Moldova into strategic industrial sectors. This will facilitate the complete integration of their industries into European value chains ahead of full EU accession. Bilateral work on this has started with Kosovo, Montenegro, North Macedonia and Serbia. Efforts to improve the functioning of the EU-Turkey Customs Union should also continue.

The economic potential extends beyond market size. Enlargement countries possess industrial capacity, skilled workforces, energy resources, critical raw materials and increasingly dynamic technology sectors that can complement the Union's economic base. Better integration can help diversify supply chains and reduce excessive dependencies in strategically important sectors, as well as contribute to food security.

Ukraine has particular potential to contribute to European industrial resilience through its capabilities in areas such as critical raw materials, energy, agriculture, digital technologies and defence production. As Ukraine rebuilds, its reconstruction process can help modernise infrastructure and industrial capacity that is more closely integrated into European value chains and aligned with European standards.

The **Western Balkans** are already closely integrated into EU manufacturing and supply chains. Further reforms, infrastructure investment and regulatory convergence can expand the region's role in European production networks and attract more investment into higher-value-added sectors.

Türkiye's diversified industrial base and deep integration into European value chains through the EU-Turkey Customs Union are important for European supply-chain resilience. Addressing existing trade irritants and improving implementation of the Customs Union would help this relationship function more effectively. In July 2026, the EU-Turkey Customs Cooperation Committee adopted an agreement to mutually recognise the respective authorised economic operator programmes.

The defence industrial dimension is also becoming increasingly relevant. Pursuant to the conditions set out in the different programmes and initiatives, starting with the security and defence interests of the Union and its Member States, closer cooperation with enlargement countries, particularly with Ukraine, can contribute to strengthening European defence production, technological innovation and supply-chain resilience.

5. Investing in the green and digital transitions

Successful enlargement requires economies that can integrate in a climate-neutral and increasingly digital European economy.

The **green transition** is both a significant investment challenge and a major opportunity. Many enlargement economies are more carbon-intensive than the EU and require substantial investments to align with the EU's climate, energy and environmental objectives and standards, including in renewable energy, grids, energy efficiency, environmental protection infrastructure, clean transportation, clean industrial technologies, waste and water management, circularity, and climate resilient infrastructure. Accelerating decarbonisation and tackling pollution while ensuring energy security and clean and affordable energy will be essential for their long-term competitiveness and successful integration into the single market. Enlargement countries should also harness the benefits of introducing carbon pricing measures based on EU requirements, that can help generate revenues to finance the transition. Closer energy integration with the EU can support this transformation. Investment in electricity interconnections, circular economy, renewable energy and energy efficiency can reduce vulnerabilities, strengthen regional energy security and create new opportunities for European businesses and investors.

Protecting and restoring the natural capital of the enlargement countries and promoting nature-based solutions will help the countries accelerate their decarbonisation efforts and gain competitive advantages stemming from the green transition.

The **digital transition** offers similar opportunities. Enlargement countries are gradually aligning with the EU digital *acquis* and developing digital infrastructure, public services and innovation ecosystems. Cooperation on AI, high-performance computing, digital identity and cybersecurity can accelerate productivity growth and contribute to Europe's technological capacity. This is the case with the greater AI capacity available following the set-up of three AI factory antennas in Moldova, North Macedonia and Serbia.

These opportunities need to be accompanied by **investment in skills**. Labour shortages, low labour market participation and mismatches between education systems and employers' needs remain constraints in several enlargement economies. Education, vocational training and skills policies should therefore form an integral part of economic convergence.

By combining reforms, investment and gradual integration, enlargement can help create a larger and more competitive European economic space. Unlocking this potential requires sustained reforms in the enlargement countries, effective implementation of EU-supported investment and continued progress on regulatory alignment. As integration deepens, the benefits should be felt more on both sides: through greater opportunities and convergence in enlargement countries and through stronger markets, value chains, connectivity and resilience for the Union as a whole.

A common framework for gradual integration

The 'Preparing for a wider Union' Communication[18] expands and deepens the concept of gradual integration as an integral part of efforts to boost growth, competitiveness and security, and an essential part of the accession process.

In recent years, the EU's gradual integration offer has been developed through a bottom-up approach. This was based on greater access to: (i) EU programmes; (ii) greater support from and access to EU agencies; (iii) implementation of single market integration and ad hoc measures; (iv) development of connectivity into EU transport, energy and digital networks; and (v) access to expert groups and committees. Significant progress has been made in recent years in all these strands. However, implementation of some measures remains uneven and fragmented across enlargement partners and among the different components of gradual integration. Furthermore, the work has not systematically focused on or being clearly linked to progress in accession preparations.

Therefore, the Commission is now putting forward a more coherent and structured approach to gradual integration with follow-up on the five strands of work, building on the work done so far. The offer will be made to every partner in comparably advanced accession situation. The mapping in the annex to this Communication shows how each part of this work will be directly anchored in – and related to – the dedicated enlargement chapter.

Gradual integration should expand in a structured manner where it brings clear benefits for enlargement partners *and* the EU, supports accession preparations and serves shared strategic priorities. Further opportunities exist in the areas of digital identity, transport, public procurement, industrial goods, energy, and emerging technologies, where appropriate. The scope and timing of participation and the associated support from the EU budget should reflect each country's progress and capacity. Access must remain conditional and reversible based on the country's alignment with the relevant *acquis*, effective implementation, enforcement, and respect for the principles underpinning the accession process. Enlargement countries will only be able to benefit from gradual integration in individual sectors if they meet the relevant cross-cutting conditions. Gradual integration does not confer the rights of EU membership or change the merit-based accession process.

At the same time, closer economic integration in a growing number of sectors and policies requires more stringent conditions. Enlargement countries need to strengthen foreign investment screening, export controls, cybersecurity, the protection of critical infrastructure and measures against sanctions circumvention and economic coercion, gradually aligning with the Union's economic security framework. Therefore, access to gradual integration should be subject to strategic alignment which is part of the EU *acquis* in chapter 31 "Common Foreign and Security Policy", and economic security requirements above, which are part of the EU *acquis* in chapter 30 ""External relations"", chapter 10 "Digital transformation and media" and chapter 15 "Energy". Current conditions for participating in programmes and activities, as set out in the acts establishing them, will have to be met as well.

Launching dialogues on gradual integration with the enlargement partners in the next six months will give the opportunity to take stock of all the existing gradual integration measures and their financing. It will also help to bridge gaps, and, where possible, to provide a more tailor-made offer suited to the specific situation of each enlargement country.

These dialogues will also create the opportunity for the Commission to assess the conditionality linked to the gradual integration offer – CFSP alignment, rule of law, progress on the enlargement process and economic security – as assessed in the annual Enlargement package. This could form both a condition to access gradual integration and the criteria for

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reversibility if the conditionality ceases to be respected. This is in line with the conditionality already present in currently applicable legal bases, such as the relevant association agreement and the agreement related to financial assistance. Dedicated support under the proposed Global Europe instrument should finance the gradual integration needs identified through the dialogues. It would support the investments, administrative capacity, regulatory implementation and information systems required for effective participation in Union policies and programmes. National plans should identify these needs and sequence financing with the reforms and operational preparations on which participation depends.

As gradual integration expands, the Union should also ensure that new policy initiatives do not unintentionally create barriers that undermine accession-driven convergence. To mitigate this, the Commission will systematically assess the enlargement dimension in other policy initiatives. And, where appropriate, the Commission will support the participation of enlargement countries that are actively converging with the relevant EU *acquis* and meet the applicable cross-cutting political conditionalities or provide for adapted treatment. Any such arrangements will remain sector-specific, conditional and reversible and will not confer the rights of membership. As announced in the 'Preparing for a wider Union' Communication, consideration should be given to how candidate countries' involvement could deepen further following the signature of accession treaties, so they could already participate in relevant parts of the single market. The Commission will examine structured political participation in relevant Commission activities, in full respect of the Treaties, the Commission's institutional autonomy and the principle of collegiality.

III. BUILDING TRUST – GOOD NEIGHBOURLY RELATIONS AND REGIONAL COOPERATION

Lasting stability depends on trust, cooperation and reconciliation. The enlargement process has long been a catalyst for regional cooperation and remains one of the EU's most effective instruments for promoting stability across the continent. By encouraging dialogue, supporting reconciliation and fostering practical cooperation, enlargement can help overcome historical divisions and build the foundations for a shared European future.

Good neighbourly relations and regional cooperation are an essential part of the Stabilisation and Association process and the accession process. Unresolved bilateral disputes, tensions between neighbours, and questions stemming from past conflicts can undermine regional stability and impede progress on membership. Enlargement countries are therefore expected to address outstanding issues constructively and in good faith, in line with international law and established agreements.

At the same time, **bilateral issues** should be addressed in a manner that supports the accession process. Sustained political dialogue, implementation of existing agreements and a commitment to good neighbourly relations are essential for building the trust required for a larger and more united Union.

Western Balkans: reconciliation and good neighbourly relations

In the Western Balkans, overcoming the legacy of the conflicts of the 1990s remains a major part of European integration. Stronger efforts are needed to address outstanding bilateral issues, including border questions, missing persons, accountability for war crimes and succession issues arising from the dissolution of the former Yugoslavia. **Reconciliation** must be based on facts and respect for victims, recognition of their rights and needs, and their meaningful participation in transitional justice processes.

Political leaders have a particular responsibility to contribute to reconciliation and avoid rhetoric or action that deepen divisions. Historical revisionism, denial or glorification of war crimes and inflammatory rhetoric are incompatible with the values underpinning the accession process and undermine trust between societies.

Existing **bilateral agreements** need **to be implemented in good faith**. This includes the Prespa Agreement between Greece and North Macedonia and the Treaty of Friendship, Good Neighbourliness and Cooperation between Bulgaria and North Macedonia. Their implementation remains crucial for regional stability, mutual trust and progress on the European path.

Regional cooperation should continue to complement these efforts. Practical cooperation on trade, connectivity, transport, energy, environment, security, research and innovation and cross-border challenges creates mutual benefits and strengthens relations between societies. Regional initiatives should remain inclusive, contribute to EU integration and be based on EU rules and standards.

Normalisation of relations between Kosovo and Serbia

For both **Kosovo** and **Serbia**, progress on their respective European paths remains contingent on progress in the **normalisation of their relations**.

Implementation of the Agreement on the Path to Normalisation and its Implementation Annex remains insufficient. Both parties need to engage constructively in the EU-facilitated dialogue and implement their respective obligations without further delay.

Normalisation is not only a requirement of the European path. It is essential for the security, stability and economic development of both societies and of the wider region. The lack of progress carries political and economic costs and risks leaving both sides behind at a time when the enlargement process has regained momentum.

The EU will continue to facilitate the dialogue towards comprehensive normalisation of relations between Kosovo and Serbia and support implementation of the agreements reached. Despite the readiness expressed by the HR/VP to convene a High-Level Dialogue meeting, political constraints have so far prevented such a meeting. Both parties bear responsibility for creating the political conditions required to achieve tangible and sustainable progress and to avoid any unilateral and uncoordinated actions, inflammatory rhetoric and measures that undermine trust.

Türkiye

Re-engagement between Türkiye and Greece continued and Türkiye did not engage in any unauthorised drilling activity in the Eastern Mediterranean during the reporting period. Yet the unresolved issue over the continental shelf and the exclusive economic zones continued to strain bilateral relations, marked most recently by the Libyan House of Representatives ratifying on 20 October the so called Libyan-Turkish Memorandum of Understanding (MoU) on the delimitation of maritime jurisdictions in the Mediterranean, which triggered a strong EU reaction at the highest level declaring the MoU as null and void. Moreover, a higher number of violations of Greek airspace, including flights over Greek islands and of Greek territorial waters were reported. Türkiye is expected to make an unequivocal commitment to **good neighbourly relations**, **international agreements and the peaceful settlement of disputes** in accordance with the UN Charter. Türkiye must avoid threats and actions that damage good neighbourly relations; normalise its relations with the Republic of Cyprus; and respect the sovereignty of all EU Member States over their territorial sea and airspace as well as all their sovereign rights. Türkiye continued to refuse to **recognise and cooperate** with the Republic of Cyprus, including on security related issues. Türkiye did not fulfil its obligation to ensure the full and non-discriminatory implementation of the **Additional Protocol** to the Association Agreement.

The EU attaches particular importance to resuming and progressing on the **Cyprus settlement talks** to further improve EU-Türkiye cooperation[19]. The EU remains fully committed to a

[19] Presidency conclusions 16933/25

comprehensive settlement within the UN framework, on the basis of a bi-communal, bi-zonal federation with political equality, in accordance with the relevant UN Security Council resolutions and in line with the EU *acquis* and the principles on which the Union is founded. The EU has confirmed its readiness to play an active role in supporting all stages of the UN-led process, with all the appropriate means at its disposal. In July 2026, the Commission appointed Executive Vice-President Raffaele Fitto as the Commission's Special Representative for Cyprus. Türkiye is expected to actively support efforts on a comprehensive settlement and to fulfil its obligations towards all Member States, including the Republic of Cyprus.

Across the enlargement region, the underlying principle is the same: European integration requires **cooperation, trust and a commitment** to resolving disputes peacefully. Good neighbourly relations are not an additional requirement alongside accession reforms; they are part of a country's ability to assume the responsibilities of EU membership.

IV. DELIVERING ENLARGEMENT – PROGRESS, REFORM AND RESULTS

The enlargement process is delivering. Since October 2025, 16 intergovernmental conferences took place. Montenegro closed 14 chapters reaching a total of 21 overall. Albania saw all its chapters opened and the first four closed after meeting the interim benchmarks for rule of law requirements in June. Ukraine and Moldova opened four clusters each, building up on thorough preparatory work ahead of the formal launch of negotiations in June.

The reporting period demonstrated that countries that sustain reforms and meet the required conditions can advance towards membership, but progress remained uneven in others. Several enlargement countries reached significant milestones, while others progressed more slowly or stalled. In some cases, countries moved further away from the requirements of EU membership.

These differences reflect the **merit-based nature of the accession process**. Each country advances according to its own progress in meeting the set criteria. The fundamentals remain central and determine the overall pace of accession negotiations. There are no shortcuts to membership, but sustained reforms produce tangible results.

The renewed momentum behind enlargement creates an opportunity for countries that are ready to advance. Seizing this opportunity depends primarily on their capacity and political determination to implement reforms, meet outstanding requirements and build the broad societal support required for EU membership.

Preparing the Union for enlargement

Successful enlargement requires preparedness on both sides. Readiness must be built throughout the process. Candidate countries must be able to apply the EU *acquis*, participate effectively in the Union's institutions and assume the rights and obligations of membership from the moment of accession. At the same time, the Union must remain capable of taking decisions, financing its policies and delivering on its priorities with a larger membership. Progress on one side should inform practical preparations on the other.

Work on pre-enlargement policy reviews continued during the reporting period. The reviews show that most Union policies can accommodate a larger membership, with targeted adaptations where needed. Enlargement preparedness should become an integral part of Union policymaking throughout the accession process. This means: (i) anticipating enlargement across policies, legislation and financial instruments; (ii) making more systematic use of gradual integration to support reform and convergence; and (iii) ensuring that the Union's governance and financial framework evolve as negotiations advance. This approach will support a merit-based accession process.

The Union's capacity to act is equally important. Work with Member States and the other institutions on decision-making and institutional arrangements needs to advance while negotiations are under way. As outlined in the Communication 'Preparing for a Wider Union[20]', future accession treaties should also contain effective and proportionate safeguards to ensure that key commitments made during negotiations continue to be respected after membership. These preparations give practical assurance that enlargement will strengthen the Union's ability to act and protect its interests.

The countries most advanced in the process have declared target dates for closing accession negotiations. This demonstrates their ambition, and the Commission is committed to supporting them in meeting EU membership requirements, as part of an accession process based on the own-merits principle. **Roadmaps** for the most advanced negotiating countries – Montenegro, Albania, Moldova and Ukraine – are presented in annex to this Communication. The roadmaps will give both the candidate countries and the Council a clearer framework for the next steps, thus helping to organise the next stages of preparation in a more structured and transparent manner. This reflects the ambition of the revised Enlargement methodology to make the process more predictable and manageable by setting out clearer priorities, sequencing reforms and negotiating steps in a more orderly way, while also improving monitoring of progress. The Commission will update the roadmaps as progress and challenges evolve, and depending on the candidates' progress, the Commission can in time draw them up for additional negotiating countries.

Until the closure of negotiations with Montenegro, which could be achieved in December 2026, the priority will be to agree on the financial package, on the institutional arrangements, including the necessary safeguards, and on closing all remaining chapters, for which the closing benchmarks have been met. **Following the closure of negotiations**, and until EU membership, the Commission will put in place a monitoring mechanism to ensure that all outstanding reforms are completed by the time of accession and that the commitments made during negotiations are maintained and consolidated further, as relevant. The 2026 enlargement report on Montenegro could be the last enlargement report prepared for the country and be succeeded from next year by monitoring reports. An information and consultation procedure will be set up to ensure Montenegro is informed about changes to the *acquis* between signature and accession. The Commission proposes that appropriate information arrangements be put in place in the Council and in the Commission already after the final intergovernmental conference, ahead of signature of the accession treaty. Such arrangements would aim to ensure that Montenegro is kept adequately informed of proposals, communications, recommendations or initiatives.

The rigorous accession process aims to ensure that countries joining the EU meet all their membership obligations on accession. The strengthened approach to **safeguards** will be applied for the first time in Montenegro's Accession Treaty. Safeguard clauses are temporary provisions designed to tackle, without delay, any shortcomings that may arise from the accession of the new Member State and to ensure that negotiation commitments are upheld after accession. Including robust, effective and proportionate safeguard clauses into the accession framework mitigates potential risks and sets a precedent for future candidates, balancing incentives with accountability. The core cross-cutting parts of the Montenegro Accession Treaty will serve as a model for institutional aspects and safeguards in **future accession treaties**.

Preparing the Union also means strengthening public understanding and support for enlargement. Member States, EU institutions and enlargement countries share the responsibility for communicating transparently about the implications, opportunities and challenges of future accessions. A credible enlargement policy requires public confidence

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that new members will be ready to assume their obligations and that the Union itself will be ready to welcome them.

Maintaining a credible and merit-based process

The renewed momentum behind enlargement must be matched by delivery. The EU will continue to support enlargement countries through political engagement, technical assistance, investment and gradual integration. In return, progress on membership requires sustained implementation of reforms and respect for the values, principles and obligations on which the Union is founded.

Indicative reform ambitions or target dates can help organise work and maintain political momentum, but they cannot replace fulfilling accession conditions. The pace of each country's progress will continue to depend on its own merits and its capacity to meet all memberships requirements.

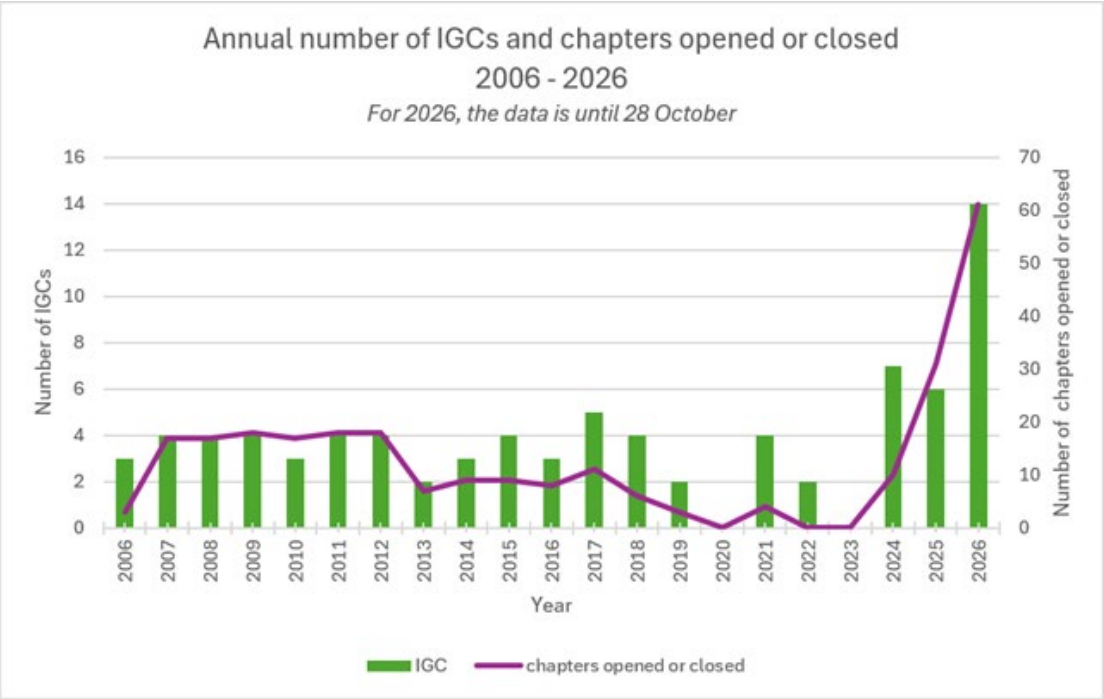
The enlargement process is both demanding and achievable. The progress made by the most advanced candidates shows that reforms lead to transformative results. The responsibility now lies with each enlargement country to make full use of the opportunities available, while the Union advances its own preparations for a larger and stronger Europe.

V. CONCLUSIONS AND RECOMMENDATIONS

I.

For the first time since 2011, when the EU closed accession negotiations with Croatia, the EU is in a position to soon close accession negotiations with another candidate country, **Montenegro**. This is testament to Montenegro's sustained efforts to advance on the European path and implement the reforms needed to turn EU membership into reality. It also shows that the enlargement process delivers results when the necessary reforms are undertaken.

EU enlargement is delivering. It is advancing **more than at any point in time in the past fifteen years.** This is reflected in the record high number of intergovernmental conferences held in the accession negotiations with Montenegro, Albania, Moldova and Ukraine. However, progress in the other enlargement partners has often been slow or non-existent.



The fundamentals of the accession process remain decisive. Democracy, the rule of law, fundamental rights, functioning democratic institutions, effective public administrations and the economic criteria are indispensable for membership. They continue to determine the overall pace of accession negotiations. Once adopted, reforms need to produce sustainable results and credible track records.

Security and resilience has become an increasingly important dimension of accession process. Alignment with the **EU's common foreign and security policy**, including with EU restrictive measures is a key requirement and a signal of strategic orientation in the current geopolitical context. In addition, enlargement countries should progressively strengthen their alignment and cooperation with the Union on hybrid threats, economic security, cybersecurity, critical infrastructure, border management and preparedness. This will help the enlargement countries consolidate their role as essential partners in countering cross-border threats and in improving the stability and security of the European continent.

Economic convergence needs to accelerate. Growth Plans, the Ukraine Facility, investment and gradual integration offer important opportunities for boosting the economies of enlargement countries before accession. The potential gains depend on reforms, regulatory alignment and enforcement, and a sound business and investment environment.

Significant progress has been achieved in recent years on **gradual integration**. The Commission is now putting forward a more structured approach, to bring clear benefits for the candidates and the EU alike, support accession preparations and serve shared strategic priorities. Participation would remain merit-based, conditional and reversible, and depend on policy readiness and strategic alignment. In the first quarter of next year, the Commission will launch gradual integration dialogues with the enlargement countries to take stock of existing measures and, where possible, to provide a more tailor-made offer.

The Commission looks forward to discussing further with the Council the conditions that should be attached to gradual integration. This could include for instance requirements related to CFSP alignment, defence industry integration, rule of law, cooperation on economic security or progress in the enlargement process itself.

Good neighbourly relations and **regional cooperation** remain essential. Bilateral issues unrelated to accession criteria should not be included in the enlargement negotiations as such. Outstanding bilateral issues should be addressed constructively and in good faith, through appropriate bilateral or international mechanisms, and existing agreements should be implemented. Reconciliation should be advanced: the European path should provide an incentive to overcome divisions.

Strategic communication and outreach on enlargement across both the Union and the enlargement countries will continue to play a key role in making the next EU enlargement a success. In parallel, strengthening resilience to foreign information manipulation and interference, including disinformation aimed at the enlargement process, remains essential to safeguarding the integrity of the process and ensuring informed public debate. The Commission has stepped up communication on what accession means for EU citizens and businesses, and what benefits and challenges there are for existing Member States. There are significant socio-economic, political and security advantages of a bigger and stronger Union. An enlarged EU is a better guarantor of political stability, security and peace on the continent. The Commission has also raised awareness of the candidate countries most advanced in the accession process. Member States and enlargement partners need to lead the national debate about enlargement, especially where public support and awareness are comparatively weaker. The Commission stands ready to support them in this effort. Two new elements complement the 2026 Enlargement package.

First, building on experience from the 2004 and 2013 enlargements, the Commission is proposing a set of indicative **roadmaps** covering milestones and an outlook for the year ahead for **Montenegro**, **Albania**, **Moldova and Ukraine**. These roadmaps will serve both as a pathway and an anchor for the accession negotiations for these negotiating countries and for the Member States. They will allow for better prioritisation, sequencing and monitoring of the process, providing greater predictability – a core principle of the 2020 revised methodology.

The roadmaps prejudge neither the outcome nor the pace of negotiations or any decision taken by the Council, the Commission or the European Parliament. They are living documents that may be **adapted** depending on progress made and may be **updated** by the Commission once a year in the framework of the enlargement package. The Commission is ready to put forward similar roadmaps for **other candidate countries** once they have reached a similar level of advancement, pace and engagement in the accession negotiations.

Second, as some candidates advance towards membership, **the EU must be ready to welcome them.** A larger Union must be stronger, more resilient and remain effective. In its Communication 'Preparing for a wider Union'[21], the Commission has set out the internal preparations needed to achieve this ambition - strengthening the Union's governance, safeguarding its values and the rule of law, adapting its policies, and preparing its budget for enlargement.

II.

Montenegro's progress is tangible evidence of the transformative power of the enlargement process when the acquis alignment is accompanied by firm focus on implementation. Montenegro has largely completed the reforms that are needed to close the negotiations, and the Commission has sent the relevant documentation to the Council. The establishment and ongoing work of the *Ad Hoc* Working Party on Montenegro's accession treaty, together with the Council Conclusions on the financial package based on the Commission's proposal, demonstrates that the EU delivers when a country progresses decisively on its EU path.

Since the last report, six inter-governmental conferences have been held with Montenegro, resulting in the provisional closure of 14 additional chapters, meaning a total of 21 closed chapters. Despite recurrent tensions between the ruling majority and the opposition, culminating with the failed motion to dismiss the Speaker of Parliament, Montenegro has managed to maintain cross-party agreement and broad support for EU-related reforms. Through political dialogue and as part of broader efforts to advance the EU accession process, this has enabled the Parliament to launch the process for constitutional amendments and adopt several of them, along with electoral reforms. It has also enabled the finalisation of most outstanding high-level appointments, including two vacant judges of the Constitutional Court. Montenegro has also made great strides in implementing its Reform Agenda, thereby supporting the reforms required for accession. The country remained fully aligned with the EU's common foreign and security policy.

The Commission assessment is that in line with the negotiating framework, an overall balance has been ensured between progress under the rule of law chapters and progress in the accession negotiations across chapters, and that Montenegro has met all outstanding closing benchmarks. As such, it considers that **accession negotiations could realistically be closed by the end of 2026**. The Commission is therefore proposing a roadmap for Montenegro for the next phases of the accession process leading up to the signature of the accession treaty. In the weeks and months ahead, it will be essential that Montenegro maintains a steady focus on completing the preparations for EU membership, sustaining the adopted reforms and ensuring continuous cross-party support to its EU path.

[21] COM(2026)705 final

Albania continued its steady progress in accession negotiations. The country opened all accession negotiations clusters in just over a year. The adoption of the interim EU Common Position on Cluster 1 in May 2026 allowed the country to start closing chapters. By October 2026, negotiations on 4 chapters were closed: 25 – science and research, 26 – education and culture, 30 – external relations, and 20 – enterprise and industrial policy. Closing benchmarks on the rule of law were also adopted, confirming the good progress made by Albania in this area. The meaningful involvement of civil society to ensure a robust legislative process remains important. Albania also continued to make good progress on the implementation of its Reform Agenda. The country remained fully aligned with the EU's common foreign and security policy.

The progress under the Rule of Law chapters determine progress in the accession negotiations across all chapters. 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 and progress in the accession negotiations across chapters. Cross-party cooperation and inclusive and constructive dialogue in the Parliament and with civil society are needed to move ahead on EU key reforms, in particular in the context of the ongoing largest protests since the country's democratic transition. Albania needs to continue adopting key reforms to fulfil closing benchmarks across all chapters of negotiations. This is important for Albania to meet **its ambitious but achievable target of closing negotiations by the end of 2027**. The Commission puts forward a roadmap for next year to guide work towards this objective.

Moldova's accession negotiations gained momentum in 2026, with the opening of clusters 1 – fundamentals, 6 – external relations, as well as 2 – internal market and 3 – competitiveness and inclusive growth in June, July and October respectively. The Commission's assessment remains that Moldova has met the conditions to open all remaining negotiation clusters. The September 2025 parliamentary elections re-confirmed Moldova's strategic choice of future EU membership. 2026 also saw the further deepening of political and economic relations with the 2nd EU—Moldova Summit (22 June) and the EU—Moldova Investment Conference (4 June). Moldova's high alignment with the EU Common Foreign and Security Policy continued to increase. Moldova also joined key gradual integration initiatives such as the Single European Payments Area, Roam Like Home, and the Common Transit Convention. Moldova continues to make very good progress implementing its Reform Agenda commitments under the EU Growth Plan but needs to accelerate work to build an investment pipeline.

Moldova intensified legislative alignment across most chapters of the EU *acquis* and further advanced on key rule of law reforms, most notably on judiciary, anti-corruption and the fight against organised and serious crime and on public administration reforms. To further advance essential rule of law and anti-corruption reforms, the European Commission and Moldova launched a joint task force in July 2026. Moldova has made very substantial progress towards meeting the interim benchmarks. These reforms, work on closing benchmarks, and further alignment with the *acquis* need to continue at pace, with strengthened implementation and enforcement capacity to ensure effective and sustained delivery on commitments. This includes working towards establishing a solid track record of investigations, prosecutions and final court rulings in corruption cases, including at high level.

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 and progress in the accession negotiations across chapters. 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 maintains the current pace of reforms. The Commission puts forward a roadmap to guide work for next year.

Ukraine's accession negotiations gained momentum in 2026 with the opening of cluster 1– fundamentals, 6 – external relations, as well as 2 – internal market and 3 – competitiveness and inclusive growth in June, July and October, respectively. The Commission's assessment remains that Ukraine has met the conditions to open all remaining negotiation clusters. Amid the difficult circumstances brought by Russia's ongoing war of aggression, Ukraine remained committed to the EU integration reform agenda, notably by continuing to demonstrate that its institutional framework for the fight against corruption is effective and that the specialised anti-corruption institutions continue to operate overall independently and effectively. 2026 also saw further deepening of the EU-Ukraine political and defence relations, including defence industry cooperation, with the launch of the EU-Ukraine Defence Industrial Partnership and the Drone Deal in July 2026. Integrating Ukraine into the European Defence Technological and Industrial Base should continue to enable co-production and joint ventures between European and Ukrainian defence industries. Recently there has been a renewed focus in Ukraine on the reforms and actual implementation of policy conditionality under Ukraine Facility and Ukraine Support Loan, with Ukraine having expressed the ambition to significantly advance in the implementation of rule of law chapters. This is a welcome development that must continue at pace. In October 2026, a joint task force was launched between the European Commission and Ukraine to further advance essential rule of law and anti-corruption reforms. Ukraine made progress on key sectoral reforms, such as customs, taxation and public procurement, as well as on alignment in the area of free movement of goods. On 1 January 2026, it joined the Roam Like at Home area, building on other gradual integration steps achieved in previous years. Ukraine has continued to advance on the implementation of the Ukraine Plan, maintaining a high level of completion of the steps agreed. It will be essential to further ensure sustained implementation in order to unlock available budget support. Ukraine's alignment with the EU's common foreign and security policy remained very high.

The Commission's assessment is that, subject to continued efforts on the rule of law, and in line with the negotiating framework, an overall balance is currently ensured between progress under the rule of law chapters and progress in the accession negotiations across chapters. Ukraine should now focus on meeting the interim benchmarks on rule of law and delivering on the roadmaps concerning the rule of law, the functioning of democratic institutions, public administration reform, and the action plan on national minorities. Ukraine should implement a comprehensive justice reform in line with EU *acquis* and European standards. It should demonstrate significant progress in tackling and preventing corruption and protecting fundamental rights in practice. Ukraine should also make tangible progress in the fight against serious and organised crime, co-operation in the field of drugs, migration and asylum. Further progress on rule of law will be essential to sustaining reform momentum and consolidating the progress achieved to date. Further progress is also needed on sectoral reforms to achieve full alignment with the EU *acquis*, in particular on aligning anti-money laundering and countering the financing of terrorism legislation to advance the prospect of joining SEPA. 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. The Commission puts forward a roadmap to guide work for next year.

During this reporting period, there has been no progress in the accession negotiations with **Serbia**. The period was marked by increasing societal polarisation in the country and erosion of trust between the Serbian authorities and civil society.

The outgoing government has reaffirmed that EU accession remains Serbia's strategic goal and work has advanced on the alignment with EU *acquis* and technical standards. At the same time, persistent anti-EU rhetoric and the glorification of convicted war criminal Ratko Mladic run counter to this declared strategic objective and to the fundamentals of the accession

process, undermining Serbia's EU path. Alignment with the EU's CFSP remained low for a candidate country aspiring to join the EU.

The EU-facilitated Dialogue on the normalisation of relations between Serbia and Kosovo was heavily impacted by domestic political developments. Implementation of outstanding Dialogue commitments remained limited. Both Parties are expected to implement all their respective obligations stemming from the Agreement on the path to normalisation and its implementation annex[22], as well as past Dialogue agreements.

The Commission maintains its assessment that Cluster 3 is technically ready for opening. 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.

Serbia's progress on its path towards the EU will depend on the efforts of the incoming Serbian government to refocus on the fundamentals of the accession process, including democratic criteria, the judiciary and fundamental rights. It will need to restore respectful democratic dialogue, demonstrate a clear and unambiguous commitment to EU values, including aligning with the EU's geopolitical orientation, and make genuine efforts towards reconciliation, good-neighbourly relations and normalisation.

North Macedonia has yet to fulfil the commitments it made to amend its constitution to include citizens who live within the borders of the state and who are part of other people, such as Bulgarians[23]. At the same time, during this period the authorities continued to work on the roadmaps on public administration reform and the rule of law, with the accompanying action plan on minorities, required under the opening benchmarks for cluster 1, and the roadmap on functioning of democratic institutions. In 2026, North Macedonia has engaged more actively with the Growth Plan for the Western Balkans and with the implementation of key reforms under its Reform Agenda, making it one of the top performers under the Reform and Growth Facility.

North Macedonia should intensity efforts to uphold the rule of law, in particular by safeguarding judicial independence and strengthening the fight against corruption. Energy reforms are also key. The country remains fully aligned with the EU's common foreign and security policy and continues to maintain generally good cooperation and bilateral relations with the EU and its neighbours.

The reporting period was marked by an increasing disengagement from the EU path on the part of **Bosnia and Herzegovina**. The work of the executive and legislature continued to be hindered by the lack of a functioning ruling coalition, and key EU-related reforms still need to be adopted. There was continued fallout from the criminal conviction and removal from office of Milorad Dodik, including institutional changes and early Presidential elections in the *Republika Srpska* entity. A new High Representative for Bosnia and Herzegovina remains to be appointed while an acting High Representative has been in office since June 2026 on an interim basis. While the severe political tensions reported last year initially subsided, political posturing, divisive rhetoric, and anti-EU narratives increased ahead of the general elections held on 4 October 2026. Bosnia and Herzegovina maintained its full alignment with the EU common foreign and security policy.

Following the elections, Bosnia and Herzegovina should proceed with setting up all executive and legislative bodies and show a renewed commitment to deliver swiftly on EU reforms. Bosnia and Herzegovina should urgently take the necessary steps to fully benefit from the Reform Agenda adopted under the Reform and Growth Facility in autumn 2025. It should

[22] 2023 Ohrid Agreement
[23] As referred to in the Council Conclusions of July 2022.

finalise the adoption of the law on the High Judicial and Prosecutorial Council as well as the amendments to the Law on the Court of Bosnia and Herzegovina, in line with European standards, and appoint an operational Chief Negotiator. As soon as the country acts on these reforms, the Commission will be ready to table the negotiating framework with a view to its adoption by the Council, hold the first intergovernmental conference, and start the analytical screening process.

In **Kosovo**, persistent political fragmentation contributed to prolonged institutional crisis, leading to early parliamentary elections in December 2025 and again in June 2026. While public support for Kosovo's European future remained strong, the institutional gridlock hindered the implementation of key EU-related reforms. Some progress has been made on serious and organised crime, but there was no progress on the functioning of the judiciary, with other concerning developments on rule of law. Following the transfer of local governance in northern Kosovo after the 2025 local elections, the Commission lifted its measures vis-à-vis Kosovo, re-engaging through the Stabilisation and Association Process Dialogue and resuming the delivery of financial assistance. Kosovo has reached full alignment with the EU's Common Foreign and Security Policy. The Commission stands ready to prepare an Opinion on Kosovo's EU membership application if so requested.

Kosovo needs to benefit of the renewed institutional stability in order to unlock progress on its path towards the EU. Substantive efforts are needed to strengthen the independence of the judiciary and to uphold Kosovo's multi-ethnic character as enshrined in the Constitution. Kosovo needs to abide by its international commitments to ensure the Kosovo Specialist Chambers' judicial independence, and the commitment to ensure accountability and to give justice to the victims and their families from all communities in Kosovo.

The EU-facilitated Dialogue on the normalisation of relations between Kosovo and Serbia was heavily impacted by domestic political developments. Implementation of outstanding Dialogue commitments remained limited. Both Parties are expected to implement all their respective obligations stemming from the Agreement on the path to normalisation and its implementation annex[24], as well as past Dialogue agreements.

Türkiye is a candidate country and a key partner of the European Union. Accession negotiations with **Türkiye** have remained at a standstill since 2018, in line with the Council's conclusions. The underlying factors that led to this assessment remain unchanged. The past year saw further deterioration in the areas of democracy, fundamental rights and the rule of law, raising serious concerns. There is a widening gap between Türkiye's stated objective of joining the EU and this backsliding on the fundamental political criteria for EU accession.

The EU has a strategic interest in a stable and secure environment in the Eastern Mediterranean and in developing a cooperative and mutually beneficial relationship with Türkiye. Cooperation is essential in areas of mutual interest, such as trade and economic relations, migration management, the green transition, the connectivity agenda aimed at bringing the EU closer to the South Caucasus and Central Asia, enhancing security in the Black Sea region. Türkiye is a significant regional actor in foreign and security policy, which constitutes an important dimension of the EU-Türkiye relationship, even though differences persist on certain foreign policy issues. Although interests and objectives have often been aligned on key regional developments, including peace and connectivity in the South Caucasus, stability in Syria, a ceasefire in Gaza and the objective of a two-state solution, as well as support for Ukraine's sovereignty and territorial integrity, Türkiye has continued to maintain a very low rate of formal alignment with the EU's Common Foreign and Security Policy. Türkiye implemented specific measures to stop the circumvention of EU sanctions

[24] 2023 Ohrid Agreement

against Russia through its territory and should continue to cooperate with the EU and step up its efforts in this area.

A phased, proportionate and reversible approach to reinvigorating key areas of cooperation with Türkiye should continue to apply, in line with the 2023 Joint Communication and the 2024 European Council conclusions. Türkiye's own constructive efforts should be sustained, and EU concerns should be addressed. Türkiye is expected to respect international law, good neighbourly relations and the sovereignty of EU Member States. Türkiye is expected to actively support 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 with the acquis. Türkiye must also fulfil its obligation to ensure the full and non-discriminatory implementation of the Additional Protocol to the EU–Türkiye Association Agreement. The resumption of the settlement talks on Cyprus would open new opportunities for cooperation and for advancing the EU-Türkiye relationship.

The continued backsliding on the fundamentals observed during the reporting period confirms that **Georgia** remains an EU candidate in name only and continues to forego the benefits that candidate status and the pre-accession process bring. The ruling party in Georgia has continued to undermine the country's EU path by pursuing its attack on democratic principles, the rule of law and fundamental rights, as well as by enabling further state capture. As a result of increasingly repressive legislation, civic space has been further and severely curtailed. Georgia continues to fall short of the nine steps set out in the Commission's recommendation for candidate status. Georgian authorities have not addressed the concerns about the state of democracy and fundamental rights in the country that led the EU to suspend visa-free travel for Georgian diplomatic, service and official passport holders, putting at risk the visa-free regime more generally.

The EU's longstanding support for Georgia's independence, sovereignty and territorial integrity stands firm, as does its unwavering support for the European aspirations of the Georgian people.

Should the Georgian authorities decide to change course and recommit to the fundamental principles underpinning EU accession – democracy, the rule of law and fundamental rights – the country's EU path could resume. The Commission would welcome such a resumption in light of the strong people-to-people ties that exist and the broad and longstanding public support in Georgia for the country's democratic European future.

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ANNEXES 1 to 6

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COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

2026 Communication on EU enlargement policy

{SWD(2026) 690 final} - {SWD(2026) 691 final} - {SWD(2026) 692 final} - {SWD(2026) 693 final} - {SWD(2026) 694 final} - {SWD(2026) 695 final} - {SWD(2026) 696 final} - {SWD(2026) 697 final} - {SWD(2026) 698 final} - {SWD(2026) 699 final} - {SWD(2026) 700 final}

ANNEX I

A roadmap for the accession negotiations with Montenegro

An outlook for 2027

In the light of the overall progress to date in the accession negotiations, the Commission presents the below roadmap for finalising the accession negotiations with Montenegro. The roadmap presented below offers clear sequencing for the provisional closure of the remaining individual negotiating chapters as well as the main steps following the conclusion of accession negotiations. By the nature of the accession negotiations, the pace of which depends on Montenegro's progress in meeting the requirements for membership, this indicative timetable prejudges neither the outcome, nor the pace of negotiations or any decision taken by the Council, the Commission or the European Parliament.

The Commission will continue to support Montenegro in its preparations for accession, and will continue to help it with expertise, including by making full use of instruments such as TAIEX and twinning, and through well targeted financial assistance, including assistance available under the Reform and Growth Facility, based on the Reform Agenda.

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PHASE I: FROM NOW UNTIL THE CONCLUSION OF NEGOTIATIONS

Milestone: final intergovernmental conference - indicative date: December 2026

Following the IGC on 12 October 2026, 14 chapters remain to be closed in the accession negotiations, which requires Council agreement that Montenegro has met the closing benchmarks as well as agreement on transitional arrangements in certain chapters, on the financial package for Montenegro and the respective institutional and other arrangements related to the country's accession.

The Commission considers that Montenegro has met all the closing benchmarks in the accession negotiations and by mid-November the Commission intends to provide all remaining draft EU common positions to the Council. The Commission therefore considers that accession negotiations could be completed as soon as December 2026 according to the below priority schedule for the closure of the chapters:

IGC in November

- Energy
- Transport
- Food safety, veterinary and phytosanitary policy
- Taxation
- Free movement of goods

IGC in December

- Financial services
- Regional policy and coordination of structural instruments
- Environment and climate change

- Foreign and security policy
- Financial and budgetary provisions
- Institutions
- Other issues
- Judiciary and fundamental rights
- Justice, freedom and security.

PHASE II. BETWEEN THE CONCLUSION OF NEGOTIATIONS AND SIGNATURE OF THE ACCESSION TREATY

Without prejudice to the outcome of any decision of the Council, the European Commission and the European Parliament in the process leading to Montenegro's accession to the European Union, the Commission would foresee the following steps following the conclusion of the accession negotiations at the last intergovernmental conference in December 2026:

1. Progressive association with the Union's institutions and working structures – phase 1

Milestone: final intergovernmental conference – indicative date December 2026

The Commission proposes that appropriate information arrangements be put in place in the Council and in the Commission already after the final intergovernmental conference, ahead of signature of the accession treaty. Such arrangements would aim to ensure that Montenegro is kept adequately informed of proposals, communications, recommendations or initiatives.

2. Completing the work on the draft accession treaty

Indicative date: spring of 2027

Requirements

- the Commission to continue to submit to the Council the remaining draft texts at the beginning of 2027;
- the draft accession treaty is agreed by the Member States and Montenegro;
- the draft accession treaty is translated into the current EU treaty languages and Montenegrin.

3. Signature of the accession treaty with Montenegro

Indicative date: June 2027

Requirements

- EU primary law is translated into Montenegrin and revised by the Council;
- the Commission issues a positive opinion on Montenegro's accession to the EU;
- the European Parliament gives its consent to Montenegro's accession;
- the Council adopts a Council decision on the admission of Montenegro to the European Union.

PHASE III: INTERIM PERIOD BETWEEN SIGNATURE AND MONTENEGRO'S ACCESSION TO THE EUROPEAN UNION

Progressive association with the Union's institutions and working structures – phase 2

Milestone: signature of the accession treaty - indicative date: June 2027

The European Parliament may invite the parliament of the acceding country to appoint observers. The Commission will examine structured political participation in relevant Commission activities, in full respect of the Treaties, the Commission's institutional autonomy and the principle of collegiality.

Following signature of the accession treaty, all Member States and Montenegro will need to ratify the accession treaty according to their constitutional procedures.

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Pre-accession monitoring

The Commission will continue to asses all the way to accession whether commitments, including those related to the fundamentals, are being implemented by Montenegro and maintained and will report regularly to the European Parliament and the Council. The Commission will continue to make use of regular peer assessment missions, the bi-annual monitoring tables as well as of all other available tools and measures. As in the past, the Commission stands ready to report to the Council and the European Parliament regularly on Montenegro's progress in meeting its commitments from the accession negotiations. The monitoring should identify shortcomings early and specify the corrective action required. Where serious issues of concern arise, the Accession Treaty should enable the Council, acting on a Commission proposal, to adopt appropriate measures focused on those commitments. Where monitoring identifies backsliding before the first day of membership and targeted measures would be insufficient, a postponement clause in the Accession Treaty could provide a last resort instrument.

ANNEX II

A roadmap for the accession negotiations with Albania

An outlook for 2027

I. Introduction

In line with the negotiating framework for the accession negotiations, which foresees that the intergovernmental conferences take stock of the overall accession process and set out an indication for the year ahead of which clusters / chapters could potentially be opened or closed, as well as in light of the overall progress achieved to date in the negotiations, the Commission presents the below roadmap for accession negotiations with Albania for 2027.

The roadmap offers a sequencing for the provisional closure of negotiating chapters and cluster 1, as a whole. It therefore provides both a pathway and an anchor for the accession negotiations for both Albania and the Member States.

Given the nature of accession negotiations, the pace of which depends on Albania's progress in meeting the requirements for membership, this indicative timeline neither prejudges the outcome, nor the pace of negotiations. This roadmap is a living document, which the Commission will update regularly, based on the progress made by Albania.

In line with the negotiating framework, progress in the negotiations remains measured in particular against the requirements of the Copenhagen criteria, including the meeting of the closing benchmarks set for the individual chapters and for cluster 1, the fulfilment of Albania's obligations under the Stabilisation and Association Agreement, as well as Albania's progress in addressing the key areas identified in the Commission's reports and relevant Council conclusions. Progress under the fundamentals' cluster determines the overall pace of negotiations, Albania needs to devote substantial further efforts to complete the work on the closing benchmarks set out in the negotiating clusters to be able to provisionally close the chapters. Progressing along the timelines set out in this roadmap will therefore depend upon the pace of reforms in Albania.

II. Outlook for the year ahead

1. Priority schedule for provisional closure of chapters

Following the IGC on 13 October 2026, 31 chapters of the accession negotiations remain to be closed. In order to reach the ambition of the Albanian authorities to close accession negotiations by the end of 2027, it would be necessary for Albania to complete its work on the closing benchmarks sufficiently in time as to allow for the closure of the remaining chapters, after verification of the fulfilment of the closing benchmarks by the EU, and for the EU and Albania to reach agreement on the transitional arrangements. Taking into consideration the relative complexity and level of preparation in each chapter, as well as the relevant reform plans of the authorities, the following initial priority schedule could be envisaged for the remainder of 2026 and 2027 for provisional closure of chapters:

Priority schedule for the remainder of 2026: intellectual property law; economic and monetary policy; company law; fisheries and aquaculture; Trans-European networks; foreign and security policy

Priority schedule for the first semester of 2027: public procurement; right of establishment and freedom to provide services; free movement of capital; digital transformation and media; Customs Union; financial control; transport policy; social policy and employment; financial services; consumer and health protection.

Priority schedule for the second semester of 2027: freedom of movement of workers; competition policy; agriculture and rural development; taxation; free movement of goods; food safety, veterinary and phytosanitary policy; statistics; regional policy and coordination of structural instruments; energy; environment and climate change; judiciary and fundamental rights; justice, freedom and security; financial and budgetary provisions; institutions; other issues; cluster 1 (the fundamentals), closed last.

Where the pace of reforms allows, the Commission will revise the priority schedule to reflect the possibility of earlier provisional closure of chapters, subject to the relevant conditions being met.

2. Other milestones of the accession negotiations

Subject to Albania making the necessary progress in its preparations, the Commission will present a Communication in due course on a financial package for the accession of Albania.

The Commission further recommends that the Council starts the arrangements for drafting the Accession Treaty with Albania in the course of 2027. In the meantime, Albania needs to ensure the timely availability of the translation of the *acquis* in Albanian.

III. Gradual integration

Accession preparation must go hand in hand with progressively deeper integration of Albania into Union policies, programmes, systems, agencies and working structures before membership. This includes advancing participation in strategic sectors, expanding access to parts of the Single Market where conditions are met, strengthening energy, transport and digital connectivity, deepening security and defence cooperation, and delivering concrete benefits for citizens and businesses. This will bring Albania closer to the EU and the Single Market already ahead of membership. Bearing in mind Albania's advanced stage of negotiations, which brings membership closer, further areas of cooperation for gradual integration prior to accession will be identified through the gradual integration dialogue to be launched in the first quarter of 2027. Deeper integration requires sustained alignment with the Union's values, *acquis* and strategic interests.

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The Commission will continue to support Albania in its preparations for accession and will continue to help it with expertise, including by making full use of instruments such as TAIEX and twinning, and through well targeted financial assistance, including assistance available under the Reform and Growth Facility, based on the Reform Agenda.

The Commission will closely monitor that the commitments undertaken by Albania in the negotiations in particular in the area of the fundamentals, are fulfilled and will report on its findings regularly to the Council. It will make use of monitoring tables, regular peer assessment missions, including as regards the rule of law, as well as of all other available tools.

ANNEX III

A roadmap for the accession negotiations with Moldova

An outlook for 2027

I. Introduction

In line with the negotiating framework for the accession negotiations, which foresees that the intergovernmental conferences take stock of the overall accession process and set out an indication for the year ahead of which clusters / chapters could potentially be opened or closed, as well as in light of the overall progress achieved to date in the negotiations, the Commission presents the below roadmap for the accession negotiations with Moldova for 2027.

The roadmap outlines the main deliverables of the accession negotiations by the end of 2027, starting with opening the remaining two negotiating clusters, the meeting the interim benchmarks on the rule of law chapters, followed by the provisional closure of a number of individual negotiating chapters. It therefore provides both a pathway and an anchor for the accession negotiations for both Moldova and the Member States.

Given the nature of accession negotiations, the pace of which depends on Moldova's progress in meeting the requirements for membership, this indicative timeline neither prejudges the outcome, nor the pace of negotiations. This roadmap is a living document, which the Commission will update regularly, based on the progress made by Moldova.

In line with the negotiating framework, progress in the negotiations remains measured in particular against the requirements of the Copenhagen criteria, including the meeting of the benchmarks set for the individual chapters and for cluster 1, the fulfilment of Moldova's obligations under the Association Agreement, including a Deep and Comprehensive Free Trade Area, as well as Moldova's progress in addressing the key areas identified in the Commission's reports and relevant Council conclusions. Progress under the fundamentals' cluster determines the overall pace of negotiations. Moldova needs to devote substantial further efforts to complete the work on the closing benchmarks set out in the negotiating clusters. Progressing along the timelines set out in this roadmap will therefore depend upon the pace of reforms in Moldova.

II. Outlook for the year ahead

1. Opening of the remaining clusters

The Commission considers that Moldova has met the necessary conditions and urges the accession conference to make every effort to open the outstanding clusters - cluster 4 (The green agenda and sustainable connectivity) and cluster 5 (Resources, agriculture, and cohesion) by the end of 2026.

2. Meeting the interim benchmarks on the rule of law

In order to reach the next phase of accession negotiations where negotiating chapters can be provisionally closed, it would be necessary for Moldova to complete its work on the interim benchmarks on the rule of law chapters. The Commission considers that Moldova is well advanced in its preparations to meet the interim benchmarks and will present the interim benchmark assessment report together with the draft interim common position to the Council, allowing Member States to process this assessment.

3. Initial priority schedule for provisional closure of chapters

All 35 chapters and cluster 1 of the accession negotiations remain to be closed. Work on the closing benchmarks for all chapters should continue without delay. A chapter can be provisionally closed after the EU has verified that the closing benchmarks have been fulfilled and once the EU and Moldova have reached an agreement on the transitional arrangements, if any. Taking into consideration the relative complexity of and Moldova's level of preparation in each chapter, as well as the relevant reform plans of the authorities, the following initial priority schedule could be envisaged for 2027 for provisional closure of chapters:

- Priority schedule for the first semester of 2027: science and research; education and culture; free movement of capital; intellectual property law; digital transformation and media; Customs Union; fisheries and acquaculture; external relations; foreign, security and defence policy
- Priority schedule for the second semester of 2027: right of establishment and freedom to provide services; economic and monetary policy; social policy and employment; free movement of goods; freedom of movement of workers; company law; competition policy; financial services; consumer and health protection; taxation; enterprise and industrial policy; transport; Trans-European networks; energy; environment and climate change; food safety, veterinary and phytosanitary policy

Where the pace of reforms allows, the Commission will revise the priority schedule to reflect the possibility of earlier or additional provisional closure of chapters, subject to the relevant conditions being met.

III. Gradual integration

Accession preparation must go hand in hand with progressively deeper integration of Moldova into Union policies, programmes, systems, agencies and working structures before membership. This includes advancing participation in strategic sectors, expanding access to parts of the Single Market where conditions are met, strengthening energy, transport and digital connectivity, deepening security and defence cooperation, and delivering concrete benefits for citizens and businesses. This will bring Moldova closer to the EU and the Single Market already ahead of membership. Moldova is encouraged to take full advantage of the opportunities for internal market treatment offered under the Deep and Comprehensive Free Trade Area (DCFTA). Further areas of cooperation, possibly including wider market access, will be identified through the gradual integration dialogue to be launched in the first quarter of 2027. Deeper integration requires sustained alignment with the Union's values, *acquis* and strategic interests.

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The Commission will continue to support Moldova in its preparations for accession and will continue to help it with expertise, including by making full use of instruments such as TAIEX and twinning, and through well targeted financial assistance, including assistance available under the Reform and Growth Facility, based on the Reform Agenda.

The Commission will closely monitor that the commitments undertaken by Moldova in the negotiations in particular in the area of the fundamentals, are fulfilled and will report on its findings regularly to the Council. It will make use of monitoring tables, regular peer assessment missions, including as regards the rule of law, as well as of all other available tools.

ANNEX IV

A roadmap for the accession negotiations with Ukraine

An outlook for 2027

I. Introduction

In line with the negotiating framework for the accession negotiations, which foresees that the intergovernmental conferences take stock of the overall accession process and set out an indication for the year ahead of which clusters / chapters could potentially be opened or closed, as well as in light of the overall progress achieved to date in the negotiations, the Commission presents the below roadmap for the accession negotiations with Ukraine for 2027.

The roadmap outlines the main deliverables of the accession negotiations by the end of 2027, starting with opening the remaining two negotiating clusters, the meeting of the interim benchmarks on the rule of law chapters, followed by the provisional closure of a number of individual negotiating chapters. It therefore provides both a pathway and an anchor for the accession negotiations for both Ukraine and the Member States.

Given the nature of accession negotiations, the pace of which depends on Ukraine's progress in meeting the requirements for membership, this indicative timeline neither prejudges the outcome, nor the pace of negotiations. This roadmap is a living document, which the Commission will update regularly, based on the progress made by Ukraine.

In line with the negotiating framework, progress in the negotiations remains measured in particular against the requirements of the Copenhagen criteria, including the meeting of the benchmarks set for the individual chapters and for cluster 1, the fulfilment of Ukraine's obligations under the Association Agreement, including a Deep and Comprehensive Free Trade Area, as well as Ukraine's progress in addressing the key areas identified in the Commission's reports and relevant Council conclusions. Progress under the fundamentals' cluster determines the overall pace of negotiations. Ukraine needs to devote substantial further efforts to complete the work on the interim and the closing benchmarks set out in the negotiating clusters. Progressing along the timelines set out in this roadmap will therefore depend upon the pace of reforms in Ukraine.

II. Outlook for the year ahead

1. Opening of the remaining clusters

The Commission considers that Ukraine has met the necessary conditions and urges the accession conference to make every effort to open the outstanding clusters - cluster 4 (The green agenda and sustainable connectivity) and cluster 5 (Resources, agriculture, and cohesion) by the end of 2026.

2. Meeting the interim benchmarks on the rule of law

In order to reach the next phase of accession negotiations where negotiating chapters can be provisionally closed, it would be necessary for Ukraine to complete its work on the interim benchmarks on the rule of law chapters. The Commission welcomes the intention of Ukraine to urgently and significantly step up the pace of the rule of law reforms, which are often complex and require broad consultations with various stakeholders, allocating sufficient time and resources to this effort to meet the established targets in the first semester of 2027. In order

to guide Ukraine towards this objective, the Commission has set up a dedicated task-force for an enhanced coordinated support.

3. Initial priority schedule for provisional closure of chapters

All 35 chapters and cluster 1 of the accession negotiations remain to be closed. Work on the closing benchmarks for all chapters should continue without delay in parallel with the fulfilment of the interim benchmarks. A chapter can be provisionally closed after the EU has verified that the closing benchmarks have been fulfilled and once the EU and Ukraine have reached an agreement on the transitional arrangements, if any. Taking into consideration the relative complexity of and Ukraine's level of preparation in each chapter, as well as the relevant reform plans of the authorities, the following initial priority schedule could be established for 2027 for provisional closure of chapters:

- Priority schedule for the first semester of 2027: education and culture
- Priority schedule for the second semester of 2027: intellectual property law; social policy and employment; enterprise and industrial policy; science and research; external relations; foreign, security and defence policy

Where the pace of reforms allows, the Commission will revise the priority schedule to reflect the possibility of earlier or additional provisional closure of chapters, subject to the relevant conditions being met.

III. Gradual integration

Accession preparation must go hand in hand with progressively deeper integration of Ukraine into Union policies, programmes, systems, agencies and working structures before membership. This includes advancing participation in strategic sectors, expanding access to parts of the Single Market where conditions are met, strengthening energy, transport and digital connectivity, deepening security and defence cooperation, and delivering concrete benefits for citizens and businesses. This will bring Ukraine closer to the EU and the Single Market already ahead of membership. Ukraine is encouraged to take full advantage of the opportunities for internal market treatment offered under the Deep and Comprehensive Free Trade Area (DCFTA). Building on the progress already achieved under the Priority Action Plan for the implementation of the DCFTA, gradual integration in 2027 should focus in particular on concluding the Agreement on Conformity Assessment and Acceptance of Industrial Products (ACAA), on Ukraine's integration in the Single Euro Payment Area (SEPA) and on achieving electricity market coupling with the EU, within the legal framework of the Energy Community Treaty and in line with the Electricity Integration Package. This will reduce compliance costs and further integrate Ukrainian industry into EU value chains and financial system. Further areas of cooperation will be identified through the gradual integration dialogue to be launched in the first quarter of 2027. Deeper integration requires sustained alignment with the Union's values, *acquis* and strategic interests.

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The Commission will continue to support Ukraine in its preparations for accession and will continue to help it with expertise, including by making full use of instruments such as TAIEX and twinning, and through well targeted financial assistance, including assistance available under the Ukraine Facility.

The Commission will closely monitor that the commitments undertaken by Ukraine in the negotiations, in particular in the areas of the fundamentals, are fulfilled and will report on its

findings regularly to the Council. It will make use of monitoring tables, regular peer assessment missions, including as regards the rule of law, as well as of all other available tools.

ANNEX V

Indexes	THIRD PARTY INDICATORS RELATED TO THE STATUS OF DEMOCRACY, GOOD GOVERNANCE AND THE RULE OF LAW IN CANDIDATE COUNTRIES AND POTENTIAL CANDIDATES[1]									
	Albania	**Bosnia and Herzegovina**	**Kosovo**	**North Macedonia**	**Montenegro**	**Serbia**	**Türkiye**	**Georgia**	**Moldova**	**Ukraine**
Freedom in the World 2026 - Global Freedom Score, Freedom House Countries and Territories | Freedom House	Total score: 69/100 (2025: 68/100) Status: Partly free (2025: Partly free)	Total score: 54/100 (2025: 52/100) Status: Partly free (2025: Partly free)	Total score: 61/100 (2025: 60/100) Status: Partly free (2025: Partly free)	Total score: 67/100 (2025: 67/100) Status: Partly free (2025: Partly free)	Total score: 68/100 (2025: 69/100) Status: Partly free (2025: Partly free)	Total score: 53/100 (2025: 56/100) Status: Partly free (2025: Partly free)	Total score: 32/100 (2025: 33/100) Status: Not free (2025: Not free)	Total score: 51/100 (2025: 55/100) Status: Partly free (2025: Partly free)	Total score: 60/100 (2025: 60/100) Status: Partly free (2025: Partly free)	Total score: 51/100 (2025: 51/100) Status: Partly free (2025: Partly free)
Democracy Index 2025 - The Economist Intelligence Unit Democracy Index 2025 - Economist Intelligence Unit	Overall Score: 6.20/10 (2024: 6.20/10) Rank: 67/167 (2024: 66/167) Regime type: Flawed democracy (2024: Flawed democracy)	Overall Score: 5.23/10 (2024: 5.06/10) Rank: 85/167 (2024: 88/167) Regime type: Hybrid regime (2024: Hybrid regime)	n/a	Overall Score: 6.28/10 (2024: 6.28/10) Rank: 64/167 (2024: 62/167) Regime type: Flawed democracy (2024: Flawed democracy)	Overall Score: 6.73/10 (2024: 6.73/10) Rank: 53/167 (2024: 50/167) Regime type: Flawed democracy (2024: Flawed democracy)	Overall Score: 6.30/10 (2024: 6.26/10) Rank: 63/167 (2024: 64/167) Regime type: Flawed democracy (2024: Flawed democracy)	Overall Score: 4.26/10 (2024: 4.26/10) Rank: 102/167 (2024: 104/167) Regime type: Hybrid regime (2024: Hybrid regime)	Overall Score: 4.36/10 (2024: 4.70/10) Rank: 99/167 (2024: 94/167) Regime type: Hybrid regime (2024: Hybrid regime)	Overall Score: 5.86/10 (2024: 6.04/10) Rank: 77/167 (2024: 71/167) Regime type: Flawed democracy (2024: Flawed democracy)	Overall Score: 4.79/10 (2024: 4.90/10) Rank: 93/167 (2024: 92/167) Regime type: Hybrid regime (2024: Hybrid regime)
World Press Freedom Index 2026 - Reporters without borders https://rsf.org/en/index	Global Score: 56.52/100 (2025: 58.18/100) Rank: 83/180 (2025: 80/180)	Global Score: 54.29/100 (2025: 56.33/100) Rank: 90/180 (2025: 86/180)	Global Score: 55.89/100 (2025: 52.73/100) Rank: 84/180 (2025: 99/180)	Global Score: 69.49/100 (2025: 70.44/100) Rank: 45/180 (2025: 42/180)	Global Score: 71.80/100 (2025: 72.83/100) Rank: 41/180 (2025: 37/180)	Global Score: 50.79/100 (2025: 53.55/100) Rank: 104/180 (2025: 96/180)	Global Score: 27.94/100 (2025: 29.40/100) Rank: 163/180 (2025: 159/180)	Global Score: 40.77/100 (2025: 50.53/100) Rank: 135/180 (2025: 114/180)	Global Score: 74.77/100 (2025: 73.36/100) Rank: 31/180 (2025: 35/180)	Global Score: 66.10/100 (2025: 63.93/100) Rank: 55/180 (2025: 62/180)

[1] 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.

Rule of Law Index 2025 - World Justice Project https://worldjusticeproject.org/rule-of-law-index/global/	Overall Score: 0.49/1 (2024: 0.48/1) Global Rank: 87/142 (2024: 89/140)	Overall Score: 0.52/1 (2024: 0.52/1) Global Rank: 70/142 (2024: 71/140)	Overall Score: 0.56/1 (2024: 0.56/1) Global Rank: 59/142 (2024: 58/140)	Overall Score: 0.54/1 (2024: 0.53/1) Global Rank: 64/142 (2024: 67/140)	Overall Score: 0.57/1 (2024: 0.57/1) Global Rank: 55/142 (2024: 56/142)	Overall Score: 0.47/1 (2024: 0.47/1) Global Rank: 96/142 (2024: 94/140)	Overall Score: 0.41/1 (2024: 0.42/1) Global Rank: 118/142 (2024: 117/140)	Overall Score: 0.58/1 (2024: 0.60/1) Global Rank: 52/142 (2024: 49/140)	Overall Score: 0.53/1 (2024: 0.54/1) Global Rank: 68/142 (2024: 64/140)	Overall Score: 0.48/1 (2024: 0.49/1) Global Rank: 90/142 (2024: 88/140)
Worldwide Governance Indicators 2025 - Rule of Law, The World Bank Group https://www.worldbank.org/en/publication/worldwide-governance-indicators	Score: 2025: 57.99/100 2024: 56.86/100	Score: 2025: 53.03/100 2024: 52.41/100	Score: 2025: 0.44/100 2024: 0.05/100	Score: 2025: 56.30/100 2024: 54.94/100	Score: 2025: 62.06/100 2024: 61.67/100	Score: 2025: 53.34/100 2024: 55.17/100	Score: 2025: 45.25/100 2024: 44.94/100	Score: 2025: 60.20/100 2024: 60.83/100	Score: 2025: 56.12/100 2024: 56.01/100	Score: 2025: 45.64/100 2024: 46.13/100
Worldwide Governance Indicators 2025 - Government Effectiveness, The World Bank Group https://www.worldbank.org/en/publication/worldwide-governance-indicators	Score: 2025: 61.98/100 2024: 53.97/100	Score: 2025: 42.60/100 2024: 42.01/100	Score: 2025: 49.86/100 2024: 50.49/100	Score: 2025: 56.37/100 2024: 54.88/100	Score: 2025: 61.98/100 2024: 62.57/100	Score: 2025: 53.02/100 2024: 54.04/100	Score: 2025: 52.94/100 2024: 51.27/100	Score: 2025: 59.53/100 2024: 58.74/100	Score: 2025: 56.73/100 2024: 56.30/100	Score: 2025: 40.15/100 2024: 40.65/100
Worldwide Governance Indicators 2025 - Control of Corruption, The World Bank Group https://www.worldbank.org/en/publication/worldwide-governance-indicators	Score: 2025: 41.97/100 2024: 41.00/100	Score: 2025: 38.35/100 2024: 38.10/100	Score: 2025: 42.80/100 2024: 44.40/100	Score: 2025: 42.04/100 2024: 41.38/100	Score: 2025: 49.57/100 2024: 46.87/100	Score: 2025: 35.90/100 2024: 36.94/100	Score: 2025: 37.39/100 2024: 36.83/100	Score: 2025: 45.22/100 2024: 56.21/100	Score: 2025: 42.92/100 2024: 42.15/100	Score: 2025: 34.11/100 2024: 34.25/100
Corruption Perceptions Index 2025 - Transparency International https://www.transparency.org/en/cpi/2025	Score: 39/100 (2024: 42/100) Rank: 91/182 (2024: 80/180)	Score: 34/100 (2024: 33/100) Rank: 109/182 (2024:114/180)	Score: 43/100 (2024: 44/100) Rank: 76/182 (2024: 73/180)	Score: 40/100 (2024: 40/100) Rank: 84/182 (2024: 88/180)	Score: 46/100 (2024: 46/100) Rank: 65/182 (2024: 65/180)	Score: 33/100 (2024: 35/100) Rank: 116/182 (2024: 105/180)	Score: 31/100 (2024: 34/100) Rank: 124/182 (2024: 107/180)	Score: 50/100 (2024: 53/100) Rank: 56/182 (2024: 53/180)	Score: 42/100 (2024: 43/100) Rank: 80/182 (2024: 76/180)	Score: 36/100 (2024: 35/100) Rank: 104/182 (2024: 105/180)
Civicus Monitor 2025 - Global Civil Society Alliance https://monitor.civicus.org/globalfindings_2025/	Score: 68/100 (2024: 64/100) Rating: Narrowed (2024: Narrowed)	Score: 57/100 (2024: 56/100) Rating: Obstructed (2024: Obstructed)	Score: 67/100 (2024: 62/100) Rating: Narrowed (2024: Narrowed)	Score: 69/100 (2024: 74/100) Rating: Narrowed (2024: Narrowed)	Score: 77/100 (2024: 76/100) Rating: Narrowed (2024: Narrowed)	Score: 38/100 (2024: 49/100) Rating: Repressed (2024: Obstructed)	Score: 23/100 (2024: 24/100) Rating: Repressed (2024: Repressed)	Score: 34/100 (2024: 54/100) Rating: Repressed (2024: Obstructed)	Score: 72/100 (2024: 71/100) Rating: Narrowed (2024: Narrowed)	Score: 52/100 (2024: 50/100) Rating: Obstructed (2024: Obstructed)

ANNEX VI

Statistical Annex

STATISTICAL DATA (as of 14/09/2026), part 1 (Albania – Montenegro)

Demography	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Total population (thousands)		2 762 i	2 391 i	3 441 pi	3 417 pi	:	:	1 830 i	1 826 i	617 i	624 i	447 806 bi	449 490 pi
Share of 15-64 in total population (%)		67.5 i	:	:	:	:	:	65.5 i	65.2 i	65.7 i	65.1 i	63.8 bpi	63.8 pi
Crude rate of natural population change (per 1 000 inhabitants)		0.9	0.5	- 2.8 p	- 3.2 p	:	:	-1.9	-2.3	1.1	1.0	- 2.6 bep	- 2.8 ep
Life expectancy at birth, males (years)		:	78.4 b	:	:	:	:	:	:	75.1	75.2 b	78.6 bep	78.9 ep
Life expectancy at birth, females (years)		:	82.4 b	:	:	:	:	:	:	80.2	80.1 b	83.9 bep	84.1 ep

Labour market	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Economic activity rate for persons aged 20-64: proportion of the population aged 20-64 that is economically active (%)													
Total		81.4 w	81.6 w	64.3	66.6	45.1 w	47.9 w	71	71.3	76.3 w	78.2 w	80.0	80.3
Males		88.1 w	88.9 w	77.7	79.8	64.1 w	67.5 w	82.5	82.5	82.0 w	84.4 w	85.2	85.5
Females		75.1 w	74.7 w	50.6	53.1	26.8 w	28.4 w	59.4	60.2	70.6 w	71.8 w	74.8	75.2
Employment rates, aged 20-64 (% of the population)													
Total		73.4 w	74.1 w	55.9	58.2	40.3 w	42.9 w	61.7	62.7	66.5 w	69.7 w	75.3	75.7
Males		79.6 w	81.2 w	69.5	71.9	59.4 w	62.5 w	70.7	71.7	72.0 w	76.1 w	80.4	80.7
Females		67.5 w	67.4 w	42.1	44.3	22.0 w	23.5 w	52.7	53.7	61.0 w	63.3 w	70.2	70.7
Persons aged 15-24 not in employment, education or training, % of the population in the age group		22.8 w	20.9 w	16.5	14.7	33.4 w	31.4 w	18.8	18.2	17.3 w	14.2 w	9.2	9.2

Labour market (cont.)	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Persons aged 15-29 not in employment, education or training, % of the population in the age group		25.0 w	22.2 w	22.2	20.1	37.6 w	35.4 w	24.2	22.6	20.3 w	16.5 w	11.3	11.2
Employment by main sectors													
Agriculture, forestry and fisheries (%)		37.2 w	36.7 w	7.6 i	7.7 i	2.4 w	2.8 w	7.8 i	9.0 i	4.5 w	4.3 w	3.6 i	3.3 i
Industry (%)		12.2 w	12.5 w	25.1 i	24.2 i	12.9 w	14.4 w	23.7 i	23.9 i	9.8 w	10.4 w	17.4 i	17.2 i
Construction (%)		7.4 w	7.9 w	9.2 i	9.5 i	11.8 w	12.6 w	7.3 i	6.7 i	8.6 w	8.7 w	6.8 i	6.9 i
Services (%)		43.2 w	42.8 w	58.0 i	58.6 i	72.9 w	70.2 w	61.2 i	60.4 i	77.1 w	76.6 w	72.0 i	72.1 i
People employed in the public sector as a share of total employment, persons aged 20-64 (%)	1)	18.2 w	19.0 w	19.0 w	19.0 w	27.4 w	26.1 w	:	:	28.3 w	29.8 w	:	:
People employed in the private sector as a share of total employment, persons aged 20-64 (%)		81.8 w	81.0 w	81.0 w	81.0 w	72.6 w	73.9 w	:	:	68.4 w	66.7 w	:	:
Unemployment rates (% of the labour force)													
Total		9.6 w	8.5 w	13.2	12.6	10.8 w	10.9 w	13.1	12.3	13.1 w	11.4 w	6.1	6.0
Males		9.3 w	8.0 w	10.9	10.1	7.6 w	7.7 w	14.3	13.3	12.2 w	10.8 w	5.8	5.8
Females		9.9 w	9.2 w	16.7	16.6	18.2 w	18.5 w	11.4	11.0	14.0 w	12.2 w	6.4	6.2
Youth, aged 15-24		24.5 w	22.8 w	30.1	30.2	17.3 w	19.5 w	29.4	28.9	23.3 w	26.0 w	14.6	15.0
Long-term (>12 months)		6.8 w	6.5 w	9.6	9.0	7.7 w	8.5 w	9.4	8.0	9.4 w	8.5 w	2.1	1.9
Average nominal monthly wages and salaries (EUR)	2)	648 iw	769 iw	646 iw	706 iw	570 iw	639 iw	595 iw	670 iw	792 iw	876 iw	:	:

Education	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Public expenditure on education relative to GDP (%)		2.9 iw	3.0 piw	:	:	4.1 iw	4.3 iw	:	:	:	:	4.7 d	:
Participation in early childhood education (children aged 3 and over)	3)	82.9 w	94.2 w	43.6 w	45.0 w	:	:	46.1	48.3	78.3	78.6	94.6 d	94.9 d
Participation in early childhood education (children aged 3 and over), males	3)	84.3 w	93.8 w	44.1 w	45.3 w	:	:	46.2	47.3	78.4	78.6	94.5 d	94.8 d
Participation in early childhood education (children aged 3 and over), females	3)	81.5 w	94.6 w	43.2 w	44.7 w	:	:	46.1	49.4	78.2	78.5	94.7 d	95.0 d
Low achieving 15-year-olds in reading	4)	73.7	:	:	:	:	:	73.6	:	52.9	:	26.2	:
Low achieving 15-year-olds in mathematics	4)	73.9	:	:	:	:	:	66.2	:	59.5	:	29.5	:
Low achieving 15-year-olds in science	4)	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 (%)		15.7 w	15.4 w	4.2	3.8	7.7 w	6.2 w	8.4	8.0	6.8 w	4.9 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		:	:	5.2	5.0	:	:	8.6	8.9	:	:	11.3	11.2
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		:	:	3.1	2.5	:	:	8.2	7.0	:	:	7.7	7.9

Education	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks)		0.7 w	1.6 w	1.8	1.6	4.5 w	2.3 w	2.5	2.8	2.8 w	3.6 w	12.8	13.5
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), men		0.6 w	1.3 w	1.5	1.2	4.3 w	2.0 w	2.7	2.4	2.2 w	2.6 w	11.6	12.2
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), women		0.8 w	1.9 w	2.0	2.0	4.8 w	2.5 w	2.4	3.1	3.5 w	4.6 w	14.0	14.7
Exposure of vocational education and training (VET) graduates to work-based learning (% of population aged 20-34)		1.6 w	1.9 w	:	:	:	:	4.4	:	:	:	64.4	65.2
Percentage of the population aged 20-24 with at most lower secondary education, total		17.4 w	16.5 w	8.1	8.2	8.8 w	7.6 w	12.9	7.5	3.8 w	4.7 w	15.0	15
Percentage of the population aged 20-24 with at most lower secondary education, males		19.0 w	19.9 w	8.8	10.2	8.1 w	7.1 w	11.8	7.3	4.6 w	6.0 w	17.5	17.4
Percentage of the population aged 20-24 with at most lower secondary education, females		16.0 w	12.9 w	7.5	6.2	9.6 w	8.2 w	14	7.7	3.0 w	3.2 w	12.3	12.5
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, total		57.8 w	55.9 w	86.1	85.4	77.5 w	79.1 w	78.1	85.0	86.2 w	83.9 w	65.9	65.6
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, males		65.0 w	63.0 w	87.2	84.8	83.0 w	83.6 w	81.0	88.1	84.5 w	84.1 w	66.3	66.1
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, females		51.0 w	48.5 w	85.1	86	71.7 w	74.3 w	75.1	81.7	88.0 w	83.6 w	65.4	65.1
Percentage of the population aged 30-34 with tertiary education, total		36.5 w	37.8 w	28.2	26.7	30.6 w	29.1 w	35.5	39.3	40.9 w	41.3 w	43.8	44.5

Education	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Percentage of the population aged 30-34 with tertiary education, males		31.2 w	34.0 w	23.5	21.3	23.9 w	23.6 w	31.4	32.5	37.7 w	41.4 w	38.4	39.2
Percentage of the population aged 30-34 with tertiary education, females		42.0 w	42.5 w	33.1	32.6	37.4 w	34.8 w	39.8	46.3	44.1 w	41.3 w	49.4	50
Share of individuals having at least basic digital skills (% of population aged 16-74)		23.3	:	30.1	36.3 w	52.5 pw	:	:	:	52.0	:	55.6	:
Share of individuals having at least basic digital skills (% of population aged 16-74), males		25.1	:	30.8	41.1 w	52.8 pw	:	:	:	53.5	:	56.7	:
Share of individuals having at least basic digital skills (% of population aged 16-74), females		21.6	:	29.3	34.1 w	52.3 pw	:	:	:	50.0	:	54.5	:

National accounts	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Gross domestic product													
In current prices (EUR million)		21 739	24 995	25 524	27 483	9 680	10 350	14 667	15 672 p	7 069	7 645	17 259 390	18 043 410
Per capita (EUR)		7 868 iw	:	7 460	8 050	:	:	8 020 e	8 590 e	11 340	12 260	38 450	40 110
In purchasing power standards (PPS) per capita		:	:	13 600	13 800	:	:	15 837 e	16 932 e	19 903	21 365	38 366	39 985
In purchasing power standards (PPS) per capita, relative to the EU average (EU-27 = 100)		:	:	:	:	:	:	41.3 e	42.3 e	51.9	53.4	100	100
Real (volume) annual rate of change, compared with the previous year (%)		4.0	4.0 p	2.0	3.2	4.1	4.6	2.6	3.0 p	6.5	3.2	0.4	1.2
Gross value added by main sectors													
Agriculture, forestry and fisheries (%)		18.4	17.7	5.5	5.4	9.0	9.3	7.1	7.0 p	4.7	4.4	1.8	1.8
Industry (%)		13.6	12.8	22.7	21.2	22.8	22.8	20.6	20.6 p	11.1	10.5	20.2	19.4
Construction (%)		13.8	14.1	5.4	5.6	10.1	10.0	7.0	7.2 p	4.8	4.9	5.5	5.5
Services (%)		54.1 i	55.4 i	66.3 i	67.8 i	58.2 i	57.9 i	65.4 i	65.1 pi	79.4 i	80.3 i	72.5 i	73.4 i

Balance of payments	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Net (inward - outward) foreign direct investment (FDI) (million euro)		1 253.6 i	1 337.3 i	949.8 i	816.1 i	650.1 w	569.2 w	488.1 w	1 036.8 w	434.0 i	491.0 i	- 60 215.5 i	- 150 086.3 i
Net (inward - outward) foreign direct investment (FDI) (% of GDP)		5.77 i	5.35 i	3.72 i	2.97 i	6.72 i	5.50 i	3.33 i	6.62 pi	6.14 i	6.42 i	- 0.35 i	- 0.83 i
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (million euro)		813.4 i	762.5 i	451.5 i	676.5 i	352.0 i	304.1 i	402.2 i	642.0 i	95.0 i	79.0 i	- 25 748.0 i	113 753.6 i
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (% of GDP)		3.74 i	3.05 i	1.77 i	2.46 i	3.64 i	2.94 i	2.74 i	4.10 pi	1.34 i	1.03 i	- 0.15 i	0.63 i
Remittances as % of GDP		4.26 i	4.18 i	7.59 i	7.75 i	13.80 i	0.00 i	2.32 i	2.11 pi	5.52 i	5.38 i	0.14 i	0.14 i

External trade in goods	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Share of exports to EU-27 countries in value of total exports (%)		70.8 iw	71.6 iw	73.0 iw	73.1 iw	32.3 iw	33.1 iw	78.7 iw	76.9 iw	36.1 iw	29.1 iw	:	:
Share of imports from EU-27 countries in value of total imports (%)		50.9 iw	51.4 iw	59.0 iw	59.2 iw	43.0 iw	44.7 iw	49.2 iw	50.5 iw	45.8 iw	45.7 iw	:	:
Trade balance (EUR million)		- 3 994	- 5 191	- 5 659	- 6 432	- 5 044	- 5 437	- 2 826	- 3 282	- 3 136	- 3 453	35 331	133 115
International trade in goods and services relative to GDP													
Imports (% of GDP)		43.9	43.2	55.7	54.1	70.3	72	80.4	74.6 p	67.6	66.2	48.1	46.3
Exports (% of GDP)		38	36.3	43.9	40.7	39.6	41.7 p	67.4	61.7 p	49.2	43.7	51.7	50.4

Public finance	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
General government surplus (+) / deficit (-) (%)		-0.8 wd	-0.3 wd	:	:	:	:	:	:	:	:	-3.4	-3.1
General government debt (%)		54.6 wd	51.5 wd	:	:	:	:	:	:	:	:	80.5	80.7

Financial indicators	Note	Albania		Bosnia and Herzegovina		Kosovo		North Macedonia		Montenegro		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Annual change in consumer prices (%)	5)	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 (%)	6)	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	:	:
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)	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	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Industrial production index (2021 = 100)		94	87	97	93.1	:	:	100.4	96.8	103	102.9	101.1	98.7

Infrastructure	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Density of railway network (lines in operation per thousand km²)		8.8 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	47.7 i	47.7 i
Length of motorways (kilometres)		25	49	231	242	:	:	335	335	0	0	76 515	:

Energy	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Net energy imports in relation to GDP		1.1 i	1.6 i	4.2 i	4.6 i	7.5 i	6.9 i	7.5 i	6.6 pi	2.1 i	3.5 i	3.2 i	2.6 i

STATISTICAL DATA (as of 14/09/2026), part 2 (Serbia – Ukraine)

Demography	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Total population (thousands)		6 641 i	6 605 i	85 280 i	85 372 i	3 736 i	3 695 i	2 513 pi	2 423 pi	:	:	447 806 bi	449 490 pi
Share of 15-64 in total population (%)		63.4 bi	63.1 i	68.1 i	68.3 i	63.8 i	64.3 i	65.9 pi	65.1 pi	:	:	63.8 bpi	63.8 pi
Crude rate of natural population change (per 1 000 inhabitants)		-5.4	-5.7	5.1	5.2	-0.7	-1.2	- 3.9 ep	- 4.1 ep	:	:	-2.6 bep	- 2.8 ep
Life expectancy at birth, males (years)		73.8 b	73.9 b	74.8	76.4 b	69.9	70.5 b	67.5 ep	:	:	:	78.6 bep	78.9 ep
Life expectancy at birth, females (years)		78.6 b	78.5 b	79.8	81.7 b	77.5	79.3 b	76.4 ep	:	:	:	83.9 bep	84.1 ep

Labour market	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Economic activity rate for persons aged 20-64: proportion of the population aged 20-64 that is economically active (%)													
Total	7)	76.8	78	63.1	64.0	68.7 w	70.8 w	58.4 w	59.1 w	:	:	80.0	80.3
Males	7)	83.3	84.2	82.7	83.3	80.3 w	81.5 w	61.9 w	60.9 w	:	:	85.2	85.5
Females	7)	70.5	71.8	43.5	44.6	57.9 w	60.5 w	55.3 w	57.5 w	:	:	74.8	75.2
Employment rates, aged 20-64 (% of the population)													
Total	7)	69.6	71.3	57.3	58.5	56.9 w	60.4 w	55.7 w	56.8 w	:	:	75.3	75.7
Males	7)	75.9	77.2	76.5	77.5	64.9 w	67.8 w	58.8 w	58.6 w	:	:	80.4	80.7
Females	7)	63.4	65.5	38.0	39.4	49.4 w	53.3 w	53.0 w	55.1 w	:	:	70.2	70.7
Persons aged 15-24 not in employment, education or training, % of the population in the age group	7)	12.4	12.9	22.4	22.9	21.0 w	17.5 w	13.8 w	13.5 w	:	:	9.2	9.2

Labour market (cont.)	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Persons aged 15-29 not in employment, education or training, % of the population in the age group	7)	15.2	14.9	25.8	25.9	26.9 w	24.1 w	23.1 w	21.9 w	:	:	11.3	11.2
Employment by main sectors													
Agriculture, forestry and fisheries (%)	7) 8)	13.1 i	12.8 i	14.6 i	14.6 i	16.5 w	16.0 w	20.9 w	18.1 w	:	:	3.6 i	3.3 i
Industry (%)	7) 8)	23.5 i	23.0 i	21.3 i	20.7 i	12.2 w	12.9 w	14.4 w	13.4 w	:	:	17.4 i	17.2 i
Construction (%)	7) 8)	5.9 i	6.0 i	6.3 i	6.6 i	8.8 w	8.9 w	7.1 w	7.5 w	:	:	6.8 i	6.9 i
Services (%)	7) 8)	57.4 i	58.2 i	57.8 i	58.1 i	62.4 w	62.2 w	57.6 w	61.0 w	:	:	72.0 i	72.1 i
People employed in the public sector as a share of total employment, persons aged 20-64 (%)		:	:	:	:	23.3 w	22.0 w	28.5 w	30.7 w	:	:	:	:
People employed in the private sector as a share of total employment, persons aged 20-64 (%)		:	:	:	:	76.7 w	78.0 w	71.5 w	69.3 w	:	:	:	:
Unemployment rates (% of the labour force)													
Total	7) 9)	9.5	8.6	9.4	8.8	16.4 w	13.9 w	4.6 w	4.0 w	:	:	6.1	6
Males	7) 9)	9.1	8.4	7.7	7.1	18.3 w	16.1 w	5.0 w	3.8 w	:	:	5.8	5.8
Females	7) 9)	9.9	8.9	12.7	11.8	14.0 w	11.1 w	4.2 w	4.1 w	:	:	6.4	6.2
Youth, aged 15-24	7)	25	23	17.5	16.4	34.5 w	28.9 w	11.5 w	9.8 w	:	:	14.6	15
Long-term (>12 months)	7) 9)	3.8	3.4	2.0	1.7	6.5 w	5.0 w	0.8 w	0.6 w	:	:	2.1	1.9
Average nominal monthly wages and salaries (EUR)	7) 10) 11) 12)	1 011 iw	1 156 iw	333 iw	491 iw	622 iw	669 iw	622 iw	727 iw	441 iw	494 iw	:	:

Education	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Public expenditure on education relative to GDP (%)	13)	3.4 piw	3.5 piw	:	4.0 iw	3.7 iw	3.9 iw	:	:	:	:	4.7 d	:
Participation in early childhood education (children aged 3 and over)	11)	71.6 b	79.5 bd	54.9	55	:	:	98.9 w	:	87.1 w	87.1 w	94.6 d	94.9 d
Participation in early childhood education (children aged 3 and over), males	11)	71.4 b	79.2 bd	55.3	55.3	:	:	99.2 w	:	87.3 w	87.3 w	94.5 d	94.8 d
Participation in early childhood education (children aged 3 and over), females	11)	71.8 b	79.8 bd	54.5	54.7	:	:	98.6 w	:	86.9 w	86.0 w	94.7 d	95.0 d
Low achieving 15-year-olds in reading	4) 11)	36.4	:	29.3	:	:	:	:	:	41.0 w	:	26.2	:
Low achieving 15-year-olds in mathematics	4) 11)	43.1	:	38.7	:	:	:	:	:	42.4 w	:	29.5	:
Low achieving 15-year-olds in science	4) 11)	35.1	:	24.7	:	:	:	:	:	34.0 w	:	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 (%)		5.8	6.2	19.5	18.7	5.3 w	6.4 w	17.5 w	16.4 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		5.8	6.8	20.1	19.6	5.1 w	6.4 w	18.6 w	16.6 w	:	:	11.3	11.2
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		5.9	5.7	19.0	17.8	5.4 w	6.5 w	16.4 w	16.1 w	:	:	7.7	7.9

Education	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks)	7)	6.1	5.5	7.4	8.0	1.7 w	1.6 w	2.2 w	2.9 w	:	:	12.8	13.5
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), men	7)	5.5	4.9	7.0	7.3	1.6 w	1.4 w	1.6 w	2.1 w	:	:	11.6	12.2
Proportion of persons aged 25-64 having participated in education and training (last 4 weeks), women	7)	6.7	6.1	7.8	8.6	1.8 w	1.7 w	2.7 w	3.6 w	:	:	14.0	14.7
Exposure of vocational education and training (VET) graduates to work-based learning (% of population aged 20-34)		21.4	21.0	:	:	:	:	:	:	:	:	64.4	65.2
Percentage of the population aged 20-24 with at most lower secondary education, total	7) 14)	6.3	6.7	23.5	21.5	5.3 w	4.5 w	22.4 w	21.9 w	:	:	15.0	15
Percentage of the population aged 20-24 with at most lower secondary education, males	7)	5.9	7.1	24.6	22.4	4.3 w	4.1 w	22.5 w	22.2 w	:	:	17.5	17.4
Percentage of the population aged 20-24 with at most lower secondary education, females	7)	6.7	6.2	22.4	20.5	6.4 w	5.0 w	22.2 w	21.7 w	:	:	12.3	12.5
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, total	7)	85.9	84.6	53.8	54.4	76.4 w	78.5 w	65.2 w	67.5 w	:	:	65.9	65.6
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, males	7)	87.5	87.7	58.0	59.8	79.4 w	81.4 w	67.4 w	68.6 w	:	:	66.3	66.1
Percentage of the population aged 20-24 with upper secondary or post secondary non-tertiary education, females	7)	84.2	81.3	49.4	48.7	72.9 w	75.1 w	63.0 w	66.4 w	:	:	65.4	65.1
Percentage of the population aged 30-34 with tertiary education, total	7)	38.2	40.0	39.9	41.7	35.6 w	38.8 w	31.3 w	35.3 w	:	:	43.8	44.5

Education	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Percentage of the population aged 30-34 with tertiary education, males	7)	29.8	32.3	39.2	40.3	31.2 w	33.3 w	23.5 w	27.2 w	:	:	38.4	39.2
Percentage of the population aged 30-34 with tertiary education, females	7)	46.9	48.0	40.5	43.1	40.3 w	44.5 w	38.1 w	42.5 w	:	:	49.4	50
Share of individuals having at least basic digital skills (% of population aged 16-74)		33.6	:	33.1	:	34.5 w	36.3 w	:	:	:	:	55.6	:
Share of individuals having at least basic digital skills (% of population aged 16-74), males		35.5	:	36.8	:	33.5 w	35.9 w	:	:	:	:	56.7	:
Share of individuals having at least basic digital skills (% of population aged 16-74), females		31.8	:	29.4	:	35.4 w	36.6 w	:	:	:	:	54.5	:

National accounts	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Gross domestic product													
In current prices (EUR million)	11) 13)	75 205 p	83 258 p	1 051 700	1 253 387	28 464 w	31 597 w	15 454	16 825	167 632	176 270	17 259 390	18 043 410
Per capita (EUR)	7) 11) 13)	11 350 p	12 640 p	11 860	14 140	7 661 w	8 541 w	6 360	7 000	:	:	38 450	40 110
In purchasing power standards (PPS) per capita	11) 15)	18 600 p	20 593 p	25 721	27 621	:	:	20 910 w	23 195 w	:	:	38 366	39 985
In purchasing power standards (PPS) per capita, relative to the EU average (EU-27 = 100)	11) 15)	48.5 p	51.5 p	67.0	69.1	:	:	34.9 ew	36.5 ew	:	:	100	100
Real (volume) annual rate of change, compared with the previous year (%)	11) 13) 15)	3.7 p	3.9 p	5.0	3.3	7.8 w	9.7 w	1.2 w	0.3 w	5.5	3.2	0.4	1.2
Gross value added by main sectors													
Agriculture, forestry and fisheries (%)	13)	4.4 p	3.7 p	7.2	6.6	6.9 w	6.3 w	8.2	8.5	8.6	8.4	1.8	1.8
Industry (%)	13)	22.0 p	21.2 p	25.6	22.2	14.1 w	14.0 w	12.2	11.3	19.9	20	20.2	19.4
Construction (%)	13)	5.9 p	5.9 p	6.1	6.6	7.6 w	8.5 w	8.3	8.3	1.8	2	5.5	5.5
Services (%)	12)	67.8 pi	69.1 pi	60.9 i	64.7 i	71.4 w	71.2 w	71.3 i	72.0 i	69.7 i	69.6 i	72.5 i	73.4 i

Balance of payments	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Net (inward - outward) foreign direct investment (FDI) (million euro)	7) 11)	4 261.6 w	4 602.5 w	4 228.3 i	4 737.0 i	1 515.7 w	1 058.7 w	323.3 w	332.6 w	4 037.3 w	3 393.4 w	- 60 215.5 i	- 150 086.3 i
Net (inward - outward) foreign direct investment (FDI) (% of GDP)	11) 13) 15)	5.67 pi	5.55 pi	0.40 i	0.38 i	5.32 iw	3.35 iw	2.09 iw	1.98 piw	2.45 iw	:	- 0.35 i	- 0.83 i
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (million euro)	7) 11)	2 123.0 i	1 721.0 i	1 373.4 i	2 020.2 i	480.9 w	262.6 w	:	:	3 228.5 w	2 540.8 w	- 25 748.0 i	113 753.6 i
Net (inward - outward) foreign direct investment (FDI) in relation to EU-27 (% of GDP)	11) 13)	2.82 pi	2.07 pi	0.13 i	0.16 i	1.69 iw	0.83 iw	:	:	1.98 iw	:	- 0.15 i	0.63 i
Remittances as % of GDP	11) 13)	5.25 pi	4.58 pi	0.02 iw	0.01 iw	7.92 iw	6.40 iw	6.71 diw	5.66 dpiw	0.99 iw	:	0.14 i	0.14 i

External trade in goods	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Share of exports to EU-27 countries in value of total exports (%)	11)	65.7 iw	64.4 iw	40.8 iw	41.9 iw	11.6 iw	8.7 iw	65.4 iw	67.3 iw	71.1 iw	64.4 iw	:	:
Share of imports from EU-27 countries in value of total imports (%)	11)	53.6 iw	53.1 iw	29.0 iw	32.0 iw	24.5 iw	27.1 iw	48.3 iw	50.2 iw	51.2 iw	50.5 iw	:	:
Trade balance (EUR million)	11)	- 8 178	- 9 159	- 97 406	- 77 291	- 8 809 iw	- 9 544 iw	- 4 275 iw	- 5 099 iw	- 29 005 iw	- 32 214 iw	35 331	133 115
International trade in goods and services relative to GDP													
Imports (% of GDP)	11) 13)	59.4 p	58.1 p	33.8	27.0	57.9 w	55.6 w	58.9	57.3	49.2	50	48.1	46.3
Exports (% of GDP)	11) 13)	55.1 p	53.6 p	31.9	27.6	49.3 w	47.8 w	35.1	31.6	28.3	29.7	51.7	50.4

Public finance	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
General government surplus (+) / deficit (-) (%)	11) 13) 16)	:	:	:	:	- 2.3 w	- 2.2 w	- 5.1 ew	- 3.9 ew	- 19.5 w	- 17.7 w	-3.4	-3.1
General government debt (%)	11) 13)	:	:	:	:	38.8 w	35.6 w	35.4 ew	38.0 ew	83.3 w	91.1 w	80.5	80.7

Financial indicators	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Annual change in consumer prices (%)	11)	12.1 d	4.8 d	54.0 d	58.5 d	2.1 w	1.7 w	13.4 w	4.7 w	12.9 w	6.5 w	6.4	2.6
Total external debt, relative to GDP (%)	11) 13) 15) 17)	58.7 piw	58.6 piw	43.3 iw	38.1 iw	77.7 iw	76.3 iw	59.0 iw	58.7 piw	86.8 iw	:	:	:
Value of reserve assets (including gold) (million euro)	11)	5 104.0	2 834.0	- 1 949.6	691.1	4 528.2 w	4 260.6 w	4 903.5 w	5 247.5 w	36 459.0 w	41 913.1 w	:	:
International reserves - equivalence in months of imports	11)	6.7 iw	7.3 iw	4.4 iw	5.0 iw	3.3 iw	2.9 iw	6.5 iw	6.5 iw	5.3 iw	5.7 iw	:	:

Business	Note	Serbia		Türkiye		Georgia**		Moldova***		Ukraine		EU-27	
		2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Industrial production index (2021 = 100)	11)	104.8	107.7	106.1	106.5	:	:	92.8 w	92.5 w	67.6	70.7	101.1	98.7

Infrastructure	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Density of railway network (lines in operation per thousand km²)	18)	38.2 iw	38.2 iw	14.6 i	14.6 i	16.0 iw	16.0 iw	34.0 iw	34.0 iw	32.7 iw	:	47.7 i	47.7 i
Length of motorways (kilometres)	11)	963	999	3 726	3 796	271	358	0	0	15	:	76 515	:

Energy	Note	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024	2023	2024
Net energy imports in relation to GDP	13) 15)	4.6 pi	4.1 pi	4.7 i	3.6 i	1.1 iw	1.2 iw	6.0 iw	6.3 piw	:	:	3.2 i	2.6 i

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

: = not available

b = break in time series

d = definition differs

e = estimated

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

** = Data shown for Georgia exclude the occupied breakaway 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, unless otherwise indicated.

Footnotes:

1) Bosnia and Herzegovina: The public sector includes NACE Rev. 2 Sections O, P and Q while the private sector includes other NACE Sections.

2) Albania: Public sector only.

3) Bosnia and Herzegovina: Since 2023, children who attended a preschool programme prior to enrolling in school and who did not regularly attend preschool are also included.

4) 2022 data instead of 2023.

5) Bosnia and Herzegovina: Consumer price inflation

6) Bosnia and Herzegovina: Based on IMF balance of payments manual, sixth edition.

7) Ukraine: Official statistics for 2022–2025 were not fully produced due to the martial law. It will gradually be produced and disseminated as defined by the State Statistics Service of Ukraine, taking into account the specific conditions of producing statistics during Russia's war of aggression against Ukraine.

8) Georgia**: Since 2020 - NACE Rev.2, before 2020 - NACE Rev.1.1.

9) Georgia**: Persons aged 15 years and older.

10) Moldova***: Includes units with one and more employees.

11) Ukraine: Since 2014, data for Ukraine generally exclude the illegally annexed Autonomous Republic of Crimea and the City of Sevastopol and the territories which are not under control of the Ukrainian government.

12) Serbia: Wages and salaries paid to employees of legal entities and of unincorporated enterprises. 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.

13) Georgia**: Based on 2008 SNA.

14) Georgia**: Persons without education are excluded.

15) Moldova***: Based on 2008 SNA.

16) Ukraine: Cash data (Government finance statistics manual 2014, IMF).

17) Serbia: Official external debt of the Republic of Serbia.

18) Moldova***: Including data from the Transnistrian region.