

The 2023 Enlargement Package – Major Political Proposals and Glimmers of a Staged Accession Approach

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Executive Summary

The Commission's 2023 'Enlargement Package', published on 8 November, is the most important for many years. At the top political level it proposes the opening of accession negotiations with Ukraine, Moldova and Bosnia-Herzegovina, alongside candidate status for Georgia, once all previously set conditions are fulfilled. The package thus reveals elements of a geopolitical logic, layered on top of the basis of EU values.

At the more technical level it includes an encyclopaedic review of the progress of all (potential) candidate states under all the chapters. While the Commission only summarises this material in qualitative terms, the present paper translates them into quantitative ratings which permits aggregation and a more transparent overall assessment, and objective comparisons between the individual candidate states.

For the present authors this improvement of the data set would only be part of a more comprehensive reform of the enlargement methodology, for which a 'staged accession' approach remains preferable. Interestingly, the Commission makes in effect a first step in this direction with a proposed Growth Plan for the Western Balkans, which would offer financial incentives and accelerated integration into parts of the Single Market for intermediate measures towards compliance with the EU membership conditions.

But the enlargement package does not make it clear why the Growth Plan has only been drawn up for the Western Balkans and its embryonic staged accession methodology is not applied to all of the East European trio, which now have been put on the same footing in the accession process. While the pending €50 billion Ukraine Facility applies a similar operational logic as the 'Reform and Growth Facility' for the Western Balkans, a similar mechanism will have to be put in place for Moldova and Georgia.

Further changes will have to be made to redress the larger ills from which the existing enlargement methodology suffers. The process of opening and closing of chapters and clusters, in particular, is too cumbersome with unanimity of the EU 27 member states still required for every step, which are not connected to financial and/or institutional incentives that the EU can in principle offer. The Commission judged that the time was not right for the 2023 Enlargement Package to include further measures to reform the existing (defective) methodology. Indeed, the agenda for decisions by the European Council in December is already extremely heavy.

The authors of this report go through a mini-max range of possible improvements to the existing methodology, linking them to ongoing discussions among member states about reforming the treaties to prepare the Union itself for future enlargement. In 2024, the year of the European Parliament's elections, the outgoing Commission should take up these issues and issue a communication on accession reform which can be implemented without incurring unnecessary delays.

Ratings

The European Commission's 2023 enlargement package is an encyclopaedic review (around 1500 pages) of the performance of all 10 accession candidates (the 6 Western Balkans, the East European trio, plus Turkey) across the 33 chapters of the accession process. This is a valuable and transparent documentary source, whose essential messages the present paper seeks to highlight.

As expected, the Commission recommended the opening of accession negotiations with Ukraine and Moldova, and for Georgia the advance to candidate status, on the grounds that they have the potential to satisfy all the conditions set by the Commission in June 2022. The Commission also recommended that membership talks be opened with Bosnia and Herzegovina, on a raft of further conditions.

The package reveals elements of a geopolitical logic, layered on top of the basis of EU values.

Our own distillation of the reports by the Commission on the Western Balkans and East European candidate states is given in Tables 1 and 2. The Commission has made qualitative ratings for the East European trio for the first time, following the same methodology as used for the Western Balkans for some years. For our part we have translated these qualitative ratings into numerical quantitative ratings, which enables summation and averaging with some suitable weights. More detail and methodological explanations can be found in the Annex.

The overall picture shows Montenegro and North Macedonia to be the front-runners, with Bosnia-Herzegovina and Kosovo as laggards. This is the familiar Western Balkan story. Of interest this time is to see the East European trio inserted between these two groups.

However, the breakdown into the two separate categories, the mainly political and mainly economic, reveals some significant contrasts. Notably, Ukraine scores the highest political ranking, but does less well in the economics. Of course the war distorts these results and it remains a speculative matter how the post-war Ukraine will recover and develop. Also very striking is how Serbia scores the highest ranking in economics, and almost the lowest on political grounds. This is clearly signalling that if Serbia's leadership could switch to become more compliant with the EU's political values, it could see fast progress towards membership.

Table 1: Enlargement Package 2023

	UA	MD	GE	AL	BiH	KOS	MNE	NMK	SRB
Political & legal fundamentals	3.1	2.8	2.3	3	2.3	1.6	2.9	2.9	2
Democracy	(3.5)	(3.5)	(2)	(2.5)	(2.5)	(2)	(2)	(2.5)	(1.5)
Rule of law & rights	2	1.5	2	2.5	2	1.5	3	2.7	2
External relations	3.8	3.5	2.8	4	2.3	1.3	3.8	3.6	2.6
Economics & administration	2.1	1.7	1.9	2.5	1.6	1.7	3.1	3.1	3.3
Economic criteria	1.75	1.5	2	2.75	1.75	1.5	3	3.5	3.5
Internal market	1.7	1.7	2	2.6	1.7	2.2	3.1	2.9	3.1
Competitiveness	2.6	2.2	2.7	2.8	1.5	2	3.2	3.2	4.4
Green agenda	2.5	1.9	1.7	1.9	1.6	1.5	3.3	3	3
Agriculture, cohesion, budget	1.8	1.2	1.1	2.4	1.6	1.5	2.6	2.8	2.6
Total, political + economic*	2.6	2.3	2.1	2.8	2	1.7	3	3	2.7

* Simple average of the Political and Economic headings

Source: Annex Table, with some re-arrangement of the headings as explained in the Annex

Table 2: Rank orders

	Political & Legal fundamentals	Economic & Administration	Total
1.	Ukraine 3.1	Serbia 3.3	Montenegro 3
2.	Albania 3	Montenegro 3.1	North Macedonia 3
3.	Montenegro 2.9	North Macedonia 3.1	Albania 2.8
4.	North Macedonia 2.9	Albania 2.5	Serbia 2.7
5.	Moldova 2.8	Ukraine 2.1	Ukraine 2.6
6.	Georgia 2.3	Georgia 1.9	Moldova 2.3
7.	Bosnia-Herzegovina 2.3	Moldova 1.7	Georgia 2.1
8.	Serbia 2	Kosovo 1.7	Bosnia-Herzegovina 2
9.	Kosovo 1.6	Bosnia-Herzegovina 1.6	Kosovo 1.7

Source: own compilation

For the Western Balkans the Commission has innovated, complementing the core enlargement methodology with a proposed new 'Growth Plan' for the region, which offers additional funding conditional upon priority reform measures. While details remain to be clarified, the Growth Plan exhibits some first features of a 'Staged Accession'¹ approach for

¹ As advocated in Milena Mihajlović, Steven Blockmans, Strahinja Subotić, and Michael Emerson, 'Template 2.0 for Staged Accession to the EU', CEPS-CEP, 28 August 2023.

accelerating the integration of candidates. Questions remain why the Commission has not chosen to extend this also to the East European trio, and what should be done to improve the enlargement methodology more comprehensively. See below for more details.

The East European Trio

For Ukraine especially the proposal to open accession negotiations is a huge encouragement, the only good news at this time when the war with Russia is not going well and the politics of the United States are raising big doubts over the reliability of their support. President Biden sustains the 'as long as it takes' speech, which more realistically may be 'as long as he is there'. The EU, if member states follow the Commission, now goes well beyond 'as long as it takes', on to permanent membership. The European Council has to endorse the Commission's position on the opening of accession negotiations, and also to buttress this with adoption of the Commission's proposal for a €50 billion aid package for the remainder of the current multi-annual financial framework (MFF) of the EU (2024-2027). For the moment it looks like these proposals will pass in December, if Hungary and Slovakia do not act as wreckers.

For Moldova this is also a crucial support. The present leadership, from President Maia Sandu through to the government, has succeeded in a spectacular political achievement. While there remain awesome economic and security concerns, this leadership has pulled Moldova out of a political swamp, characterised by the unenviable choice between a pro-Russian orientation and a corrupt oligarchy, and put it on a credible European path. Yet the current regime is still fragile looking ahead to the next round of elections, and so the opening of accession negotiations is an absolutely necessary signal.

The advance of Georgia to candidate status is the most controversial proposal. Although the government and parliament have made energetic bureaucratic efforts to meet some of the conditions set by the EU, fundamental problems for their membership bid remain. In internal politics the regime is an egregious case of oligarchic state capture, which the response to the EU's conditions has done nothing to change. In external relations the degree of convergence on EU foreign and security policies has been declining, with obvious abstentions from EU sanctions towards Russia. The granting of candidate status is sent as an encouragement to pro-European public opinion, in spite of the government.

These principal proposals of the Commission are still subject to a 'but', or a further layer to the conditionality system. For Ukraine and Moldova the proposals to open accession negotiations are followed immediately in the texts by the recommendation that the Council adopts the negotiating framework once Ukraine and Moldova have each fulfilled a few supposedly 'technical' conditions, which however carry great political significance since they pertain to the rule of law and reforms of the electoral code. This means that the operational opening of negotiations is suspended at least until March 2024 when the Commission will report back to the Council.

For Georgia "the status of candidate country /is/ on the understanding that the following steps are met..." which consist of no less than nine conditions relating essentially to the problems of oligarchy and foreign policy mentioned above. This amounts to saying that the June 2022 conditions have not adequately been met, while the Commission wanted to avoid the damaging impact on public opinion of denying candidate status.

Southeast Europe

The Western Balkan states are viewed in the Commission documents with differentiated assessments, with three countries considered to be on relatively positive tracks (Montenegro, North Macedonia, Albania) and three needing resolution of fundamental political problems (Serbia, Kosovo, Bosnia and Herzegovina).

Montenegro, informally described in the past as ‘front-runner’, has been suffering serious political tensions internally. However there is now a new leadership in which both the president and prime minister have impressive political profiles from a European perspective. The Commission concludes that “the new government needs to focus on delivering key pending EU-related reforms”.

For both North Macedonia and Albania, following their first intergovernmental conferences in July 2023, the Commission is looking forward to an opening of the first Cluster for Fundamentals by the end of 2023.

For both Serbia and Kosovo the Commission is highlighting the need for more serious commitment to their ‘Agreement on the Path to Normalisation’, signed in Ohrid in March 2023. This agreement, that started as a French-German diplomatic initiative and further developed under the EU-facilitated dialogue, is a remarkably skilful text for substantive reconciliation, avoiding the hazards of irreconcilable terminology. The problem is that relations between the two parties have gone backwards since then, although the agreement still stands as a basis for a constructive future.

Bosnia and Herzegovina, which was granted candidate country status in December 2022, has shown no substantial progress on fundamental reforms. Nevertheless, the Commission now recommends the opening of accession negotiations once compliance with a set of conditions related to the adoption of the rule of law and the preservation of the constitutional order is met, with a report to be addressed to the Council in March 2024. Negative developments in the Republika Srpska, notably including secessionist actions, are impeding progress.

Finally, despite years of standstill in accession negotiations over the Cyprus issue and a continued slide away from the EU and in the areas of fundamental rights and freedoms, Turkey remains in the eyes of the Commission “a key partner” and “candidate country”. Until the European Council decides otherwise, the Commission lets EU strategic interests prevail over the corrosion of the merits-based approach in the enlargement process with Turkey: trade, cooperation on migration, and security in the eastern Mediterranean. The European Council in June 2023 invited the High Representative and the Commission to submit a report on the state of play of EU-Turkey relations with a view to discussing it at the December Summit and proceeding in a “strategic and forward-looking manner”.

Accelerated Integration: Engine of a Growth Plan

The past year has seen intense debate among member states and in civil society over how the revised enlargement methodology of February 2020 has not succeeded in deblocking the stagnation of the accession process in the Western Balkans. Even President Macron is on record as saying that the new methodology is not working. There is every probability that,

without reform, it would lead to similar results with the new applicants from Eastern Europe. The Commission is of course fully aware of these debates and various proposals that have been advanced to re-dynamise the process.

There has been much mostly loose talk about 'gradual' or 'sectoral' or 'accelerated' integration. However the Commission now proposes a new mechanism for the six Western Balkan countries called the 'Growth Plan'. Building on the 2020 enlargement methodology, this introduces a prototype form of 'staged accession', without however calling it that. The key rationale of the Plan is to provide the Western Balkans with more opportunities for closer links to the EU's single market "once the necessary level of preparedness has been achieved". While the Communication does not offer much detail on the conditions that will be used as benchmarks, and with which quantitative and/or qualitative markers to make this assessment, the Commission is said to be working on refining these aspects. Arguably, it should do so for the stages as well, as now only a rough structure emerges from the Growth Plan, with unspecified minimum, intermediate and full access levels to be attained in just some areas when conditions are met.²

The Commission has set out seven initial priority areas of the Single Market that the European Commission has earmarked for accelerated integration:

- free movement of goods: with agreements on conformity assessment for manufactured goods, new agreements on improved customs and tax cooperation (complementing the Stabilisation and Association Agreements), and participation of all Western Balkan states in the Convention on Common Transit;
- free movement of some e-commerce related services and mutual recognition of professional skills and qualifications of workers;
- access to the Single Euro Payments Area (SEPA), which would indeed substantially reduce the cost of cross-border payments to the benefit of consumers and businesses;
- facilitation of road transport, by implementing the relevant acquis through the existing Transport Community and, in particular through a separate agreement (complementing the SAAs) granting access of the Western Balkan partners to the relevant EU information systems;
- integration and de-carbonisation of energy markets, through the existing Energy Community. Additional drivers to green the economy are important to improve soil, water and air quality in the Western Balkans, which is among the worst polluted regions in Europe;
- parts of the Digital Single Market, although largely conditional on amending the SAAs; and
- industrial supply chains, by developing strategic partnerships on the supply of critical medicines and raw materials.

2 See European Commission, 'New growth plan for the Western Balkans', COM(2023) 691 final, 8 November 2023, for instance, p.6 ("As a minimum, all the Western Balkan countries should fully participate in the relevant EU programmes" of the Single Market and "Commission-led expert groups"); p.5 ("Integrate the region into EU trust services once national legislation is compliant with electronic identification, authentication and trust services (eIDAS). An intermediate step will be the development of a regional Digital Identity Wallet ("Balkan Digital Identity Wallet") aligning with that of the EU and following the exact same technical specifications"); and p.8 ("The Reform Agenda will be a key driver of the growth plan: fulfilling it will create the necessary preconditions to take up and fully benefit from the available single market opportunities").

These priority areas are linked to ongoing work for the implementation of the Common Regional Market, as a pre-condition for accelerated integration with the EU Single Market, which itself is undergoing a digital and green transition.

Fuelling this engine for accelerating the accession process is a NextGenerationEU-type financial instrument which is aimed at the objective of accelerating fundamental reforms. Once approved in the context of the mid-term review of the MFF, the proposed instrument would include extensive rule of law, socio-economic and other reform-based payment conditionality, and take into account recommendations from the latest Commission enlargement package. The latter includes the loyal implementation of the 'normalisation' agenda between Serbia and Kosovo as a precondition.

According to the proposal, each Western Balkan country will be invited to prepare a 'Reform Agenda' based on existing recommendations, including from the annual Enlargement Package, and the conclusions of the ongoing economic and financial dialogue. The Agenda, to be assessed and adopted by the Commission, will identify a limited set of priority reforms, broken down into qualitative and quantitative steps which will serve as conditions for receiving financial benefits. When met this will trigger the release of funds under a new 'Reform and Growth Facility' endowed with €6 billion (up to €2bn in grants and up to €4bn in soft loans) for the remainder of the current MFF (2024-2027). The Commission expects that, combined with the funds still available under the third edition of the Instrument for Pre-Accession (IPA III) for the next three years, the Facility would provide the Western Balkans with "roughly the same aid intensity per inhabitant as cohesion policy does on average in the EU". This claim seems to be a bit of an exaggeration. For example, the 2022 cohesion receipts of Croatia were €1,2 billion. Scaled up for the population size of the six Western Balkan states this would give €5,3 billion. The current IPA III amounts to an annual €2 billion, and the proposed Growth Plan would provide an annual €1,5 billion, totalling €3,5 billion. The new Facility will therefore not close the gap but narrow it.

It remains to be seen whether or not the EU's new seed money will kickstart reforms and lead to a race to the top between Western Balkan states. If and when the budget support to the governments is spent well then there may, indeed, be a potential for spill-over effects from additional foreign direct investment triggered by reforms in some of the seven initial priority areas of the Single Market that the European Commission has earmarked for accelerated integration.³ The latter implies prior alignment on EU acquis in each specific area and having the necessary infrastructures and working institutions, especially CEFTA, which is the main governance mechanism for managing the Common Regional Market.

In short, opportunities for accelerated integration into parts of the EU's Single Market will only materialise if the Western Balkan six deliver on regional economic integration. As such, the Common Regional Market serves as an external laboratory and a way station for access to some sectors of the Single Market. The Growth Plan aims to ensure a broad level-playing field amongst the Western Balkan states. Countries that impede the implementation of the Common Regional Market Action Plan will see 'their' benefits reassigned to countries who do what's expected. Following the own merits-based approach, the methodology of the

³ For a more critical look at the dynamics of partial integration, see Steven Blockmans and Michael Emerson, 'The Limits of Gradual Sectoral Integration Between the EU and Candidate Countries', [European Western Balkans](#), 7 September 2023.

Growth Plan therefore allows no Western Balkan country to block access to sectors of the EU Single Market for the other five. This is a welcome innovation to the Commission's pre-accession methodology. It should be noted though that 'less-for-less' conditionality has not been spelled out in the Commission's 2023 Enlargement Package, despite a call by the European Council in June 2022 to advance gradual integration already during the enlargement process in a reversible manner.

However, while updating the annexes of the Stabilisation and Association Agreements is relatively straightforward, negotiating and ratifying complementing agreements will require time and capacity of the public administrations of the Western Balkan countries (and the Commission), thereby diverting attention away from conducting actual membership negotiations.

Finally, the enlargement strategy (nominally only a 'communication') does not make it clear why the Growth Plan has only been drawn up for the Western Balkans and its embryonic staged accession methodology is not applied to all of the Eastern European trio, which now have been put on the same footing in the accession process. While the pending €50 billion Ukraine Facility applies a similar operational logic as the 'Reform and Growth Facility' for the Western Balkans, a similar mechanism will have to be put in place for Moldova and Georgia. A radically revised Instrument for Pre-Accession would then have to follow suit to replace IPA III.

More Reform Is Needed to the Way Accession Is Done

While helpful innovations, the mechanisms referred to above do not redress the larger ills from which the existing enlargement methodology suffers. The process of opening and closing of chapters and clusters, in particular, is too cumbersome with unanimity of the EU 27 member states still required for every step, which are not connected to financial and/or institutional incentives that the EU can in principle offer.

There is a mini-max range of improvements to the existing methodology on offer. The simplest would be to switch decision-making on clusters and chapters from unanimity to qualified majority voting in the Council. There is an overwhelming majority of opinion among stakeholders that the unanimity requirement for these second-level technical decisions should be dropped, which the Council can decide as an administrative decision without treaty change or the adoption of any legislation. Another minimal step would be for the Commission to quantify the qualitative ratings that they do each year in the Enlargement Packages (along the lines done above). This would bring greater transparency and the possibility to sum and average ratings, further enhancing the cluster and chapter processes. The Commission could do this also without legislation or negotiation with the Council, and actually they do it for internal purposes already. Such measures would give signals of encouragement to those labouring away at *acquis* compliance.

More complex and comprehensive is the Staged Accession proposal, which has been much discussed in official and civil society circles. It would include the two above measures, and also introduce financial and institutional incentives with the passage from stage to stage, including also provisions for reversibility of the stages in the case of serious backsliding. A further major element would be to have a penultimate stage that would see full functional membership alongside two temporary institutional limitations (no veto powers and no member

of the Commission). The temporary exclusion of veto powers would be to insure against a proliferation of their abusive use by some member state observed in recent years. This would best go alongside the EU's own institutional reforms to limit veto powers and the size of the Commission (as advocated in the recent French-German expert report)⁴, in which case the special provisions of the penultimate stage could be dissolved.

More radically, the formal opening and closing of clusters could be scrapped. This would extend the effort contained in the revised enlargement methodology of February 2020 of reducing the number of individual veto points for unconstructive member states by clustering negotiating chapters. In fact, getting rid of the formal decisions to open and close clusters and chapters would constitute a return to the way in which the membership negotiation process was initially organised with, as the Treaty prescribes, unanimous decision-making in the Council only for the opening and closing of the entire accession process. The Commission would continue to spell out in detail in the annual Enlargement Packages what each candidate states needs to do, and crucially continue to adopt ratings, best quantified as proposed above. The Intergovernmental Conferences would continue to review progress under the headings of the chapters, and financial and institutional incentives would come with measured advances in the ratings. The Intergovernmental Conferences would deliberate on the passage from stage to stage, and the EU would at the end of the process be responsible for deciding when the advances in the ratings had achieved the level required for preparation of the Treaty of Accession.

The Commission judged that the time was not right for the 2023 Enlargement Package to include further measures to reform the existing (defective) methodology. Indeed, the agenda for decisions by the European Council in December is already extremely heavy. More encouragingly, however, a senior Commission official has opined that the summer of 2024 could be a time to take up these issues.⁵

Conclusions

The Commission's new Enlargement Package is the most important for many years. It is the first to integrate the East European trio into the accession process with the candidate countries from Southeast Europe. It proposes key advances for the three East European states, the conditional opening of accession negotiations for Ukraine and Moldova, and candidate status for Georgia. For Ukraine this goes alongside the Commission's existing proposal for a €50 billion financial support instrument.

For the Western Balkans the Commission proposes a new €6 billion 'Growth Plan' instrument that would be complementary to the formal enlargement methodology, and offer financial incentives to accompany accelerated integration with parts of the Single Market. This Growth Plan instrument has elements of a prototype of the Staged Accession proposal for reforming the currently inadequate enlargement methodology. But the mechanism needs to be further fleshed out and offered to the East European states as well.

4 Olivier Costa, Daniela Schwarzer, Pervenche Berès et al., Report of the Franco-German Working Group on EU Institutional Reform, 'Sailing on High Seas: Reforming and Enlarging the EU for the 21st Century' (Paris-Berlin: Institute Jacques Delors, September 2023).

5 Remarks by Director General Gert Jan Koopman at a public event at CEPS on 8 November 2023.

Recommendations

- While the outgoing Commission judged that the time was not right for the 2023 Enlargement Package to include further measures to reform the existing (defective) methodology, it should use 2024, year of the European Parliament's elections, to take up these issues and publish a communication on accession reform which can be implemented by its successor without incurring unnecessary delays.
- This communication on accession reform should complement the impact assessment that Commission President von der Leyen has promised in her 2023 State of the European Union address, evaluating the expected impact of further enlargement on the EU's institutions, procedures and policies.
- Having gathered the information needed to prepare the EU's capacity to absorb new members, the Belgian Presidency of the Council should then feed this knowledge into the discussions among member states about the Strategic Agenda for the next policy and legislative cycle of the EU (2024-2029). When properly and promptly implemented, the EU should then be ready for enlargement by 2030, the date with which European Council President Charles Michel has raised expectations among candidate countries and member states alike.

Annex: Data base and Methodology

The Annex Table below relies on the analyses contained in the Enlargement Package 2023, with some adaptations.

Almost all chapters are concluded by the Commission with summary qualitative ratings, which are here converted into quantified ratings with a five-level numerical scale as follows:

1. Early level of preparedness for membership
2. Some level
3. Moderate level
4. Good level
5. Very advanced level

There are two main exceptions to the qualitative ratings of the Commission.

First, and without any explanation, the Commission declines to give qualitative ratings for the functioning of democratic institutions, although texts include as much detailed analysis as for the chapters that are rated. This is surprising since democracy is the most fundamental of all criteria for accession. The Commission does include as an annex to its document summary results from a number of well-known independent sources that make quantified ratings and rankings of democracy. However these are difficult to use here, since the definitions of democracy being used range widely across related issues such as the rule of law, which are separately and comprehensively treated in the Enlargement Package. In this situation we have here introduced quantified ratings as our judgements on the basis of the Commission's analysis.

Second, a similar situation arises for the chapter on relations with neighbouring states. We group this with the External Relations chapters, and advance quantified ratings again on the basis of the Commission's analysis.

The tables put the numbers for these headings in brackets to signal that we have introduced elements of our own judgement.

In Table 1 of the main text the quantified ratings are summed with weighting factors. Clearly a simple averaging of all chapters that range from the highest political priorities (such as Democracy) to the purely technical (such as Statistics) makes little sense. We have therefore assembled two categories, first the small number of Political and Legal Fundamentals, and second the large number of Economic and Administrative headings.

Regarding the 'Political and Legal Fundamentals' we adapt the Commission's usage to make it more coherent and relevant, with three sub-headings: Democracy, the Rule of law (consisting of the average of Chapters 23 and 24), and External Relations (consisting of the average of three headings). While the External Relations heading was in the past a banal matter of counting UNGA resolutions, in the new geo-political context it has become a fundamental matter indeed that new member states are going to be cohesive and not disruptive on this account.

The numerous (35) 'Economic and Administrative' headings, are grouped into four clusters in line with Commission practice. For Table 1 in the main text we have in a first step taken the simple averages of the chapters of each of these clusters, and then in a second step the average of the clusters. We have re-arranged in part the Commission's Cluster 1 for Fundamentals, restricting it to political and legal elements as explained above. We have re-located the Economic Criteria as a heading of the Economic & Administrative grouping, and re-located three non-fundamental elements surprisingly included by the Commission in Cluster 1 also under economic headings (public procurement, statistics, financial control) for the purpose of calculating averages of the relevant headings.

Finally, in Table 1 we take the simple average of the two main Political and Economic headings as the Total result.

Annex Table – Enlargement Package 2023, converted into quantitative ratings

	UA	MD	GE	AL	BH	KOS	MNE	NMK	SRB
Cluster 1 Fundamentals									
2.1 Democracy and public admin									
2.1.1 Democracy	(3.5)	(3.5)	(2)	(2.5)	(2.5)	(2)	(2)	(2.5)	(1.5)
2.1.2 Public admin reform	2	2	2	3	1.5	2	3	3	3
2.2 Rule of law & rights	2	1.5	2	2.5	2	1.5	3	2.75	2
2.2.1 Ch 23 Judiciary, hum. rights	2	1.5	2	2.5	2	1.5	3	2.5	2
2.2.2 Ch 24 Justice, freedom, sec.	2	1.5	2	2.5	2	1.5	3	3	2
2.3 Economic criteria	1.75	1.5	2	2.75	1.75	1.5	3	3.5	3.5
2.3.1 Market economy	1.5	1.5	2	3.5	1	1.5	3	4	4
2.3.2 Capacity to compete	1	1.5	2	2	1.5	1.5	3	3	3
2.4 Procurement, stats., finance	1.6	1.6	2	3	1.3	2.2	3.2	3	3
2.4.1 Public procurement	2	2	2	3	2	2.5	3.5	3	3
2.4.2 Statistics	2	2	2	3	1	2	3	3	3
2.4.3 Financial control	1	1	2	3	1	2	3	3	3
Cluster 2 Internal market	1.8	1.7	2	2.5	1.9	2.2	3.1	2.9	3.2
Ch 1 Free movement goods (TBT)	3	2	2	2.5	1	2.5	3	3	3
Ch 2 Free movement labour	1	1	1	1	2	2	2	1	3
Ch 3 Services, establishment	2	1	3	3	1	2	3	3	3
Ch 4 Free movement capital	2.5	2	3	3	3	3	3	3	3
Ch 6 Company law	2	1.5	2	3	2	2	4	4	4
Ch 7 Intellect. Prop. rights (IPR)	2	2	2	3	3	3	4	3	4
Ch 8 Competition	2	2	1	2.5	2	2	3	3	3

Ch 9 Financial services	2	2	2	3.5	2.5	2	3	3	3
Ch 28 Consumer & health	2	2	2	1	1	1	3	3	3
Cluster 3 Competitive etc	2.6	2.2	2.7	2.8	1.5	2	3.2	3.2	4.4
Ch 10 Digital, media	3.5	2	2	3	1	2	3	3	3
Ch 16 Taxation	2	2	2.5	3	2	2	3	3	3
Ch 17 Econ. & monetary policy	3	2	3	3.5	1	3	3	3.5	3.5
Ch 19 Social, employment	1	2	2	3	2	1	2	3	3
Ch 20 Industrial policy	2	2	3	3	1	3	3.5	3	3
Ch 25 Science, research	3	3	3	1	2	1	4	4	4
Ch 26 Education, culture	2	2	3	3	1	2	4	3	4
Ch 29 Customs union	4	2.5	3	3	2	3	3	4	4
Cluster 4 Green agenda	2.5	1.9	1.7	1.9	1.6	1.5	3.3	3	3
Ch 14 Transport	2	2	2	1	2	1	3.5	3	4
Ch 15 Energy	4	2.5	2	3.5	1	2	4	3	3
Ch 21 Trans-European Networks	2	2	2	2	2	2	3.5	4	3
Ch 27 Climate, environment	2	1	1	1	1.5	1	2	2	2
Cluster 5 Agri, cohesion, budget	1.8	1.2	1.1	2.4	1.6	1.5	2.6	2.8	2.6
Ch 11 Agriculture	1	1	1	2	1	2	3	3	2
Ch 12 Food safety (SPS)	3	2	1	2	2	2.5	3	4	3
Ch 13 Fisheries	2	1	1	3	1	1	2	3	3
Ch 22 Regional	2	1	1.5	3	1	1	3	3	3
Ch 33 EU budget	1	1	1	2	1	1	2	1	2
Cluster 6 External relations	3.8	3.5	2.8	4	2.3	1.3	3.8	3.6	2.6
Ch 30 External relations	4	3	3	4	2	1	4	3	3
Ch 31 CFSP, defence	4	3.5	3	4	2	1	4	4	3
Regional neighbourly relations	(3.5)	(4)	(2.5)	(4)	(3)	(2)	(3.5)	(4)	(2)

Source: own compilation



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