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The Future of EU Enlargement Policy: Four Scenarios for Enlargement in Wartime Europe

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DISCLAIMERS

The views expressed in this paper do not necessarily reflect the position of the Konrad Adenauer Foundation.

This paper does not claim to be exhaustive and represents a theoretical exercise that outlines alternative scenarios for the future of enlargement. This paper aims to contribute to the current debate on the future of EU enlargement and spark discussions on possible scenarios of this process.

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Table of Contents

Introduction **4**

Methodology **5**

Four Scenarios **6**

Scenario 1 – Dynamic Enlargement 6

Scenario 2 – Cautious integration 9

Scenario 3 – Differentiated membership 11

Scenario 4 – Enlargement frozen 14

Three "Black Swans" considered **16**

Developments to watch **16**

Annex I – Status of EU Accession Process (as of June 2026) **19**

Glossary **20**

Bibliography **21**

Introduction

Russia's full-scale invasion of Ukraine revitalized the process of EU enlargement. While prior to 2022, European leaders had suggested that the accession process should be put on hold, they suddenly embraced the membership perspective for Ukraine and Moldova and accelerated negotiations with the Western Balkans. The overall progress among candidates remains, however, highly uneven. While countries like Montenegro are actively reforming and aiming for entry by 2028, others like Ukraine and Moldova experience severe security hurdles due to the war Russia is waging, while the negotiations with Serbia, Bosnia and Herzegovina, Georgia, and Turkey are stalled or completely frozen due to various political setbacks or democratic backsliding. Adding to this complexity, the EU itself faces internal institutional challenges and strained transatlantic relations, making it imperative for the bloc to reform its own voting and budget structures before or in parallel to accepting new members.

While there has been a shift in understanding enlargement not just as a transformative force but as a security imperative, challenges remain regarding how to reform the EU internally, considering that Treaty change does not seem likely in the current political environment. Furthermore, restructuring the agricultural and cohesion budgets, while securing ratifications at the national level, seems to be no easy task. At the EU level, the current debate highlights a tension: the urgency of geopolitical rhetoric hardly fits with the need for technical compliance and reform in the candidate countries. In the 2025 Communication on EU Enlargement policy, the European Commission declared that the current geopolitical context drives enlargement, but that the process must also "remain strict, fair and merit-based". The European Council Conclusions of 19 June 2026 similarly highlight the importance of the merit-based and reversible character of enlargement. In parallel, EU institutions and Member States started to consider alternative models of the accession process. This includes the Commission's proposal on 'reversed enlargement', the Franco-German initiative on 'symbolic membership', and the gradual or staged integration model. Nevertheless, questions remain as to how enlargement could evolve and which accession model it could follow. Our scenarios report wishes to enrich the current debate and chart the possible trajectories in which EU enlargement could evolve considering the shifting logics of accession and political and institutional preferences of EU Member States.

For the period until 2029, marking the end of the current EU institutional cycle, this report identifies four possible scenarios – ***Dynamic enlargement, Cautious integration, Differentiated membership, and Enlargement frozen*** – to map the potential future path of the EU enlargement process. Underneath all these dynamics are the broader geopolitical and domestic developments. Among those, a major driver is Russia's war on Ukraine and how it might evolve. Other key factors driving this process include national elections, the rise of domestic populism, hostile (hybrid) warfare targeting the EU, as well as other possible shifts in EU Member States and the candidate countries. We acknowledge that developments in Russia's war on Ukraine will play a crucial role in shaping different scenarios, although its ultimate impact on EU enlargement remains highly ambivalent. The end of the war might lead to a loss of a sense of immediate geopolitical urgency that could cause the process to lose its momentum. Conversely, it can also accelerate the accession process as the latter will be happening in parallel to the reconstruction efforts supported by Western partners. Our scenarios do their best to account for this complexity without aiming at probability or prediction or claiming to be exhaustive.

This report was jointly developed by the Egmont Institute – Royal Institute for International Relations and the Konrad-Adenauer-Stiftung (KAS) Europe through a range of interviews with experts and civil society representatives from Montenegro, North Macedonia, Serbia, among others,[1] and a workshop held in Brussels in May 2026 with a dozen

1 See bibliography for the list of interviews.

leading policy experts and scholars from the Egmont Institute, Carnegie Europe, ETH Zurich, KAS Europe, Ukrainian Prism, SWP (Stiftung Wissenschaft und Politik), and the European Policy Center (EPC). We hope that our reflections and insights will inform public and policy debate on the future of EU enlargement that remains unpredictable, with the potential to develop in multiple directions. In this context, our four scenarios serve as generalized frameworks, and their individual elements can co-exist.

METHODOLOGY

The starting framework we adopted for this scenario-building exercise is a three-by-three matrix (see below), which was used to assess the possible developments in EU enlargement policy between 2026 and 2029. To construct our scenarios, we followed the intuitive-logics scenario planning approach. Its core aim is to comprehensively capture uncertainty, rather than build a single, most precise scenario. This process began by identifying a number of key drivers and variables that are likely to impact the EU enlargement process. Our key ideas and projections were further refined and expanded during an interactive workshop with experts on EU enlargement, Western Balkans and Eastern Europe.

Our initial premise was that ***EU Member States' positions*** and the ***Logics of EU accession*** are the two most important drivers shaping the future of EU enlargement in the indicated period.

The ***EU Member States' (MS)*** axis (horizontal) reflects the reality that EU enlargement is ultimately a political decision that requires unanimity among Member States. This makes national positions, elections, vetoes, and domestic scepticism critical factors. We identified three main positions that could become a common denominator for EU Member states: *Structural scepticism* (focus on EU internal reform and opposition to further enlargement), *Conditional pragmatism* (selective support for enlargement), and *Geopolitical openness* (geopolitical transformation and broader support for the next enlargement rounds).

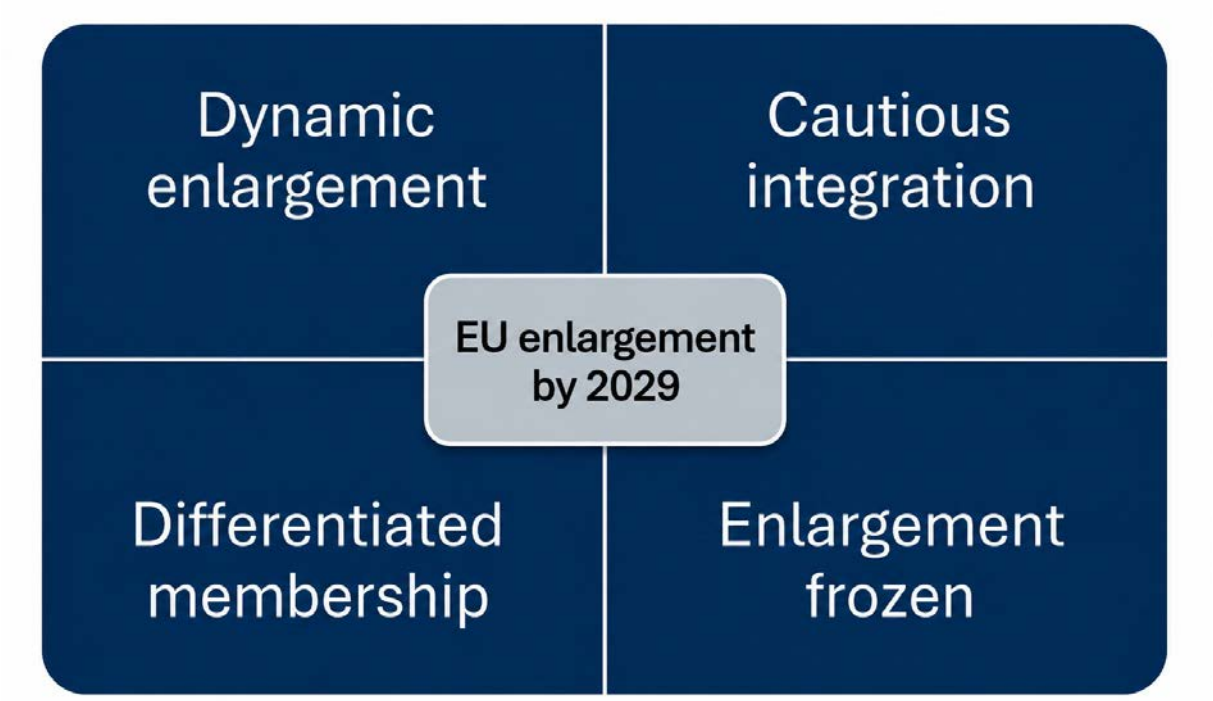
In turn, the ***Logic of Accession*** (vertical axis) reflects the structural and legal avenues currently under consideration. They can determine whether candidate countries will have to wait for (or can soon gain) full membership or whether they can access the EU Single Market via phased or accelerated models, eventually shaping the future of a 30+ EU. In this context, we consider three key models: The *Traditional model*, politically driven but with a focus on a merit-based approach (e.g. Western Balkans), *Gradual integration* with a pre-accession flexibility requiring a step-by-step compliance with tangible benefits prior to full membership (e.g. Moldova), and *Differentiated membership* with a post-accession flexibility that would emphasize post-accession reforms (e.g. Ukraine).

Starting matrix

EU MS position/ Logic of accession	Structural scepticism	Conditional pragmatism	Geopolitical Openness
Traditional approach			
Gradual integration			
Differentiated membership			

This initial matrix was subsequently revised during the workshop discussion. Several of the most relevant variables and drivers shaping EU enlargement policy were further identified, including developments in Russia's war on Ukraine, elections in EU member states and candidate countries, among others. Through this collaborative exercise, we ended up with four distinct scenarios, each reflecting possible futures of EU enlargement policy, its implications for the EU and candidate countries, and the risks each scenario entails.

Four Scenarios



SCENARIO 1 – DYNAMIC ENLARGEMENT

A strong consensus among EU Member States drives a dynamic dual-track accession process. Full membership is granted (or about to be granted) to the frontrunner candidates like Montenegro and Albania, while less advanced countries (e.g. Moldova and Ukraine) are brought in through the gradual integration logic. This approach allows the EU to include new members without compromising its institutional functionality.

The EU Member States decide to grant advanced, small-scale economies like Montenegro and Albania full institutional membership. After an active public outreach campaign in EU Member States, the respective Accession Treaty gets ratified by all 27 countries with the new members getting full voting rights and access to structural and cohesion funds. The Cooperation and Verification Mechanism (CVM), modelled upon the experiences of Bulgaria and Romania, is put in place. Meanwhile, more recent candidates like Ukraine and Moldova open several negotiation clusters but are simultaneously directed onto a parallel track driven by the logic of gradual integration. These countries are granted early conditional access to some pillars of the Single Market and security networks, but full institutional inclusion remains conditioned upon the long-term political and economic alignment with the EU *acquis*.

The regional security environment remains the key factor influencing the speed and format of enlargement, as the trajectory of Russia's war on Ukraine influences the EU's willingness to accept its Eastern European neighbours. Dynamic Enlargement becomes possible if Ukraine wins against Russia, if the war is halted thanks to a ceasefire or remains in a stalemate. Furthermore, this scenario is contingent on an outcome of the 2027 presidential elections in France that does not disrupt its support to EU enlargement as a strategic and security imperative.

To adapt to this new reality, the EU makes some changes to its internal machinery. While consensus is reached on accepting Montenegro and Albania, alternative accession pathways are considered for other candidates. Following the logic of gradual integration, the Union separates economic integration from political voting rights and allows candidates to join sector-by-sector without granting them a veto in the Council.

For the governments and societies concerned, this logic of accession brings a mix of euphoria and geopolitical anxiety. The apparent distinction between full membership for some as opposed to a gradual approach to others evokes fears and criticism from candidate countries like Ukraine that continue to highlight that full membership should remain the end goal and no alternative model can substitute it. In the frontrunner states like Montenegro, the mood is celebratory but with a big pressure to adapt to the demands of a full membership. Countries like Moldova open several clusters of negotiations and continue to reform with citizens experiencing further benefits of cheaper trade and infrastructure funding.

Conversely, international stakeholders' disagreements and Bosnia and Herzegovina's internal divisions paralyze the country's prospects to open negotiation clusters. The leadership of Republika Srpska intensifies its rhetoric to accuse Brussels of "double standards". Civil society actors stress the importance of effective implementation of ongoing reforms. North Macedonia remains decoupled from Montenegro and Albania. Facing a persistent block from Bulgaria, Skopje's progress remains conditioned upon changes in its Constitution. Since this requirement from Bulgaria is part of the EU's Negotiating Framework via the 2022 French proposal, no cluster gets opened, while Skopje continues to benefit from access to the Single Market and the EU Growth Plan for the Western Balkans. Furthermore, unless Russia experiences a severe defeat in the war against Ukraine, Georgia is likely to remain stuck in the process due to democratic backsliding and its government's detachment from Brussels, while Turkey's long-standing accession process becomes redefined as a strategic, purely transactional partnership. In turn, Serbia's progress remains frozen as Belgrade refuses to align with EU foreign policy, particularly vis-à-vis Russia.

While Montenegro's and Albania's entry would mark a historic milestone, their accession will not serve as a universal blueprint for the rest of the candidates. Since Montenegro is a rather small country, already a member of NATO and part of Eurozone, its integration will be treated as a unique case, but the one that opens the door for other candidates like Ukraine and Moldova. The accession of new members thus gives more credibility to the EU enlargement process, signalling that full membership is a real possibility when domestic reforms reach a certain level. Furthermore, after its accession, Albania becomes a strong advocate for further Western Balkans enlargement. As a significant number of Albanians live in neighbouring countries, Tirana will capitalize on its EU membership to sustain the enlargement momentum. Albania's entry would also increase pressure on the government of North Macedonia to advance in its accession.

At the same time, the Serbian official response is rather critical and defensive as Montenegro's success story risks shifting the blame for Serbia's stagnation onto its own government's intentional foreign policy choices. Furthermore, countries on a gradual integration track remain susceptible to targeted hybrid warfare and economic coercion from countries like Russia, which exploit the prolonged waiting periods to destabilize pro-EU governments in the region. Ultimately, while the success story of Montenegro or Albania provide a morale boost and reinforce credibility of the enlargement process,

the gradual integration track does not solve structural vulnerability of Eastern European candidates and other Western Balkan states.

In the meantime, Icelanders narrowly vote in favour of resuming the accession talks with the EU as a reaction to the altered geopolitical and security environment, notably US president Donald Trump's claims on Greenland. This development pushes the EU accession debate in Norway towards a more concrete phase.

Implications for...

European security and regional stability

Candidate countries:

- Persistent vulnerability to (hybrid) threats of the candidate countries on the gradual integration track.

The EU:

- Secured maritime borders via the integration of the Adriatic and Ionian coastlines;
- The EU's evolving ambitions to contribute to securing the European Arctic and NATO's Northern flank.

Economy

For candidate countries:

- A surge in Foreign Direct Investment (FDI) in Montenegro and Albania, accelerated development of infrastructure through EU Cohesion Funds.

For the EU:

- Better connection between logistics hubs in Central Europe and Western Balkans.

Democracy

For candidate countries:

- Scepticism about the possibility of full membership among the candidates on the gradual integration track, lowered political will of some countries to pursue reforms at a faster speed;
- Increasing pressure on civil society and other domestic actors to sustain the enlargement and reform momentum and pressure national governments to pursue reforms.

For the EU:

- Admitting only Montenegro and potentially Albania would not affect the EU's institutional balance and the state of democracy as they would enter under strict post-accession safeguards and reversibility mechanisms.

Society and demography

For candidate countries:

- Rising levels of emigration of high-skilled workers and younger people from Montenegro, Albania and potentially of neighbouring countries' citizens of these two countries. Nonetheless, the levels remain significantly lower compared to the 'big bang' enlargement countries;

- In the mid-term, possible return of some high skilled diaspora to new EU members who see business and related job opportunities;
- Continuous "brain drain" in the candidate countries on the gradual integration track.

For the EU:

- No major impact, as the newly accepted states are rather small in population size and Ukrainians formerly under temporary protection are well integrated into the European labour market.

SCENARIO 2 – CAUTIOUS INTEGRATION

Divergent opinions among Member States reduce the EU's enlargement policy to the lowest common denominator, namely the general acknowledgement that enlargement should proceed. Only Montenegro as an exceptional case succeeds in entering the EU. Both structural sceptics of enlargement and pragmatists who want to keep the ball rolling are satisfied with this position. The geopolitical urgency is nominally present, but in reality, the agreed methodology is applied, and the process remains gradual, incremental, and merit-based.

EU Member States struggle to advance discussions on alternative pathways for enlargement, such as the suggested reverse enlargement or a possible associated EU membership. The EU thus arrives at the lowest common denominator: enlargement must continue, but on terms that preserve the prerogatives of Member States, putting reforms first. This framework resonates with those Member States that traditionally put a strong emphasis on fundamentals and regularly scrutinise the candidates' reforms. Simultaneously, it provides an acceptable solution to those Member States that want to sustain political momentum and do not want enlargement to stall.

The European Council reaffirms the commitment to enlargement. The European Commission continues to roll-out gradual integration, as announced in the latest Enlargement package of 2025, and adds initiatives to more and more candidate countries. Roam like at Home and the Single Euro Payments Area (SEPA) are eventually joined by most candidate countries.

Montenegro joins the EU but is treated as an exceptional case. While sending a positive signal on the outcome of the accession, the ratification process in the 27 Member States has been complex and obstacle ridden. The speed of progress in the other Western Balkan countries remains moderate, but not entirely linear. This is due to the presence of protests and occasional setbacks in the reforms. Some administrations, like in Tirana, are generally positive towards gradual integration as they see it as a way to avoid a possible stalemate. Others are more sceptical and fear that this approach might stall enlargement for years. The opening of further negotiation clusters with Moldova and Ukraine causes a wave of frustration in North Macedonia that remains trapped in a bilateral dispute. In turn, it allows Belgrade to keep financial perks without the need for painful democratic reforms and to blame Brussels for any delays in its accession process.

While this model results in a *status quo* for the Western Balkans candidate countries, it would be accompanied by developments at the operational level in negotiations with Ukraine and Moldova. The latter will open further clusters and move towards greater convergence with the EU. As part of the gradual integration process, Kyiv is further included into the EU's digital service zone and energy grids, with investments into the joint SAFE instrument for defence procurement. However, political membership and voting rights remain conditioned upon long-term reforms in the Fundamentals Cluster. Achieving a settlement in the Russo-Ukrainian war is widely considered by EU Member States as an essential prerequisite for resolving the country's security, institutional capacity, and territorial integrity issues and moving towards eventual full membership.

On the political level, the EU's renewed commitment to proceed with enlargement, the accession of Montenegro, and the successful continuation of negotiations with Ukraine and Moldova become the pillars of the Union's narrative according to which the EU is delivering on enlargement.

EU Member States seek to build consensus for future treaty ratification by highlighting the success of these developments and emphasizing the benefits of economic integration with candidate countries.

Iceland's potential return to the accession track would stand out as a rare success story for the EU. If Iceland were to resume accession negotiations and accede by 2028, this would demonstrate that accession remains possible, even if more difficult processes are stalled. Yet Iceland's smooth accession could equally backfire: for Western Balkan candidates who have waited far longer and navigated far more demanding reform processes, it risks becoming precisely the kind of fig leaf that allows the EU to project credibility without addressing the deeper structural challenges that continue to hold back enlargement where it matters most.

Overall, while gradual integration finds a degree of acceptance in the candidate countries as a way to sustain the enlargement momentum, fears remain that this model might replace full membership. This model creates a risk for raising Euroscepticism in the region as a response to the frustration and uncertainty regarding the end goal of enlargement.

Implications for...

European security and regional stability

Candidate Countries:

- Persistent vulnerability of candidate countries to external actors' interference and hybrid threats.

The EU:

- Disunity among EU Member States undermines the credibility of enlargement as a strategic priority. It risks turning accession into a patchwork of national interests;
- Greater exposure to instability, foreign interference, organised crime, and hybrid threats from a slowly integrating neighbourhood.

Economy

Candidate Countries:

- Further alignment to EU standards in selected areas of the Single Market;
- Lowered incentive for reforms in the absence of near-term membership.

The EU:

- Possible vetoes of Member States vis-à-vis candidate countries due to possible competition in strategic sectors such as fisheries, agriculture, automotive, etc.

Democracy

Candidate Countries:
- Reform fatigue and possible decrease in support for pro-EU governments;
- Uncertainties over Ukraine's accession path create pressure on the Ukrainian government, with renewed debates about the possibility of elections.

The EU:
- High attention to merit-based approach and EU Fundamentals;
- Persistent tension between the speed and initiatives of the European Commission and the EUCO's rhythm.

Society and demography

Candidate Countries:
- A demographic challenge for Ukraine as many Ukrainians are transitioning to long-term residencies in EU countries.

For the EU:
- No major changes as Montenegro's accession does not bear heavy demographic consequences; the same holds in case Iceland accedes;
- In the absence of a coordinated approach to Ukraine's refugees, the end of TPD poses immense challenges to the future of the EU's asylum policy.

SCENARIO 3 – DIFFERENTIATED MEMBERSHIP

Geopolitical openness emerges as the dominant position among Member States, especially with regards to Ukraine in the context of a possible war settlement. The strategic consensus within the EU stresses the urgent need to anchor Eastern European and Western Balkan states within the European security order. In this context, the political and security membership goes first, creating an institutional bond before the candidate countries complete the reforms in all policy areas. This early political admission goes in parallel with strict post-accession conditionality. As a result, the EU moves away from the binary of in/out toward differentiated rings of integration. The latter is enabled through issue-packaging among security maximalists (Baltic and Nordic Member States) with the Friends of the Western Balkans, leading to the establishment of three concentric circles of membership.

A negotiated ceasefire Russia's war on Ukraine triggers an emergency European Council. However, the EU leaders remain collectively *takers* of the outcome, not being an official part to the negotiation. The EU decides to grant symbolic political membership to Ukraine and Moldova to secure their geopolitical alignment. In response, a coalition of Member States, the so-called Friends of the Western Balkans (Austria, Italy, Greece, Croatia, Slovenia) insist that this initiative should be inclusive towards all the candidate countries. The group believes that this is an appropriate time to bring the candidate countries from the Western Balkans closer to the Union, while discouraging the idea of Ukraine receiving special treatment, as this could lead to frustration and hinder the region's accession process.

Consequently, the concentric circles model becomes a real pathway, given the impossibility to deliver a full-fledged membership to Ukraine, nor a treaty-revision allowing another type of membership.

The first circle would see the formation of a defence and security union, bringing Ukraine and other candidates even closer to the EU. This includes the candidate countries' enhanced cooperation with Frontex, their integration into the EU Agency for Cyber Security, as well as PESCO projects.

Hence, together with Ukraine and other new political members, the EU puts its focus on defence, launching negotiations to operationalize Article 42.7 of the Lisbon Treaty, the EU's mutual defence clause. Drawing on Article 28 of the TEU as in the case of the European Peace Facility initiative, the debate starts on whether the operationalisation of this clause should take place within the EU's existing framework or via a separate treaty. While some Member States want to use the existing EU structure as a more efficient way to proceed, others are against it citing unpreparedness to engage materially or fears of being compelled into a frozen or open conflict. To bypass this gridlock, EU Member States agree to create a coalition with the new political members outside the EU framework, similar to the Coalition of the Willing established in support of Ukraine in 2025. An alternative to such a Europe-led defence collaboration outside of NATO could be the establishment of a European Security Council (ESC). Such a Council could institutionalize European defence responses among member states and key defence allies such as Ukraine, the UK and Norway, potentially the NATO Secretary General and the Presidents of the European Council and Commission.

The second concentric circle is established around the Single Market, operating on the principles of gradual integration. Candidate countries can join different areas of the Single Market upon the step-by-step implementation of reforms and approximation of their legislation to the EU acquis. For Ukraine and Moldova, DCFTA agreements concluded in 2016 serve as the basis for stronger integration. Driven by the EU's 6 bln euros Growth Plan for the Western Balkans, their access to the Single Market will follow a gradual, merit-based approach allowing them to participate in different sectors if they align with EU legislation.

The third and final concentric circle focuses on education, culture, connectivity, and European values. Cooperation proceeds in these areas with full access to programmes like Erasmus+, Horizon, the Youth Experience Scheme, and Creative Europe. It also includes further integration into the EU energy market, the Emissions Trading System, green lanes, EU policies on critical raw materials, etc. This is seen as a space for socialisation and further approximation of the candidate countries to the EU.

To underline that full membership remains the ultimate goal of this model — and to counter critics who see it as a potential substitute for accession — Iceland and possibly Norway are participating in this framework alongside the revival of their own membership talks. In sum, while not new, the components of this model allow some Member States and candidate countries to advance integration and EU enlargement in certain areas when others are not ready or more sceptical. It also directly responds to the geopolitical imperative that has been driving the new momentum for the EU enlargement process since 2022. For the candidate countries, this brings ambiguous results. While they respond positively to being anchored within the European security structures, full EU membership remains the end goal they keep insisting on. Furthermore, countries like Ukraine stress that security and enlargement are inseparable and should go hand-in-hand.

Implications for...

European security and regional stability

Candidate Countries:
- Full alignment with EU Foreign and Security Policy as well as defence and military standards;
- Full inclusion in EU agencies dealing with Cyber security and Border Controls;
- Lowered vulnerability to external malign influences.

The EU:
- A window of opportunity to create an autonomous security structure outside NATO, including key allies such as Ukraine, the UK, Norway and possibly Canada.

Economy

Candidate Countries:
- Increased motivation to speed up reforms in the Single Market Area to fully complete the accession;
- Bilateral trade with some Member States becomes more cost-effective, and it expands to more MSs;
- Sectors excluded from early Single Market integration (e.g. services, financial markets) remain less competitive;
- Sectors integrated into the EU market earlier develop a stronger competitive advantage and can lead to national specialisation in those industries (cf. Car Manufacturing in CEE after the 2004 enlargement).

The EU:
- Benefits from an increased number of trading partners but is affected by a possible unfair competition between local and imported products, due to an uneven level playing field on labour and production costs;
- Raising costs of military spending and impacts on public welfare.

Democracy

Candidate Countries:
- Resources (personnel, budgets) dedicated to enlargement process shift to the creation and implementation of the new security structure and the negotiations inevitably slow down;
- Some of the candidate countries reorient their priorities with regard to reforms, favouring market access compliance and security standard alignment over fundamentals.

The EU:
- More difficult democratic oversight due to the complexity of the concentric circles structure.

Society and demography

Candidate Countries:
- Increase of “Enlargement fatigue”, growth of anti-EU tendencies.

The EU:
- Higher portions of public budgets go into military spending and welfare costs are reduced, impacting social cohesion.

SCENARIO 4 – ENLARGEMENT FROZEN

Domestic scepticism in EU Member States and poor reform progress of the candidate countries lead to a systemic freeze of the enlargement process. Affected by deep economic crisis, several Member States insist that a fundamental reform of the EU is needed prior to any accession. The safeguards for the Accession Treaty for Montenegro are not deemed sufficient, and Member States fail to agree on this blueprint. This breeds deep dissatisfaction in the candidate countries and erodes the EU's transformative leverage, with some candidate countries losing ground in the reform progress. This dynamic backfires on the EU: the potential "ring of friends" gets replaced with a more sceptical and alienated neighbourhood susceptible to economic and political influence of global powers such as Russia or China.

The process of EU enlargement is put on hold due to scepticism and a severe economic downturn in several EU Member States. Facing prolonged stagnation and rising domestic dissatisfaction, the European governments turn inward to secure support of their voters. EU Member States refuse to finance the structural reforms and infrastructure upgrades required for the accession of the Western Balkans and Eastern European states. As a result, economic anxieties and domestic problems eclipse the geopolitical urgency, making the EU postpone the next enlargement round and slow down the process.

Candidate countries stagnate in the reform process. While they formally adopt the necessary acts and set up the required bodies, the established mechanisms are not fully functional. Furthermore, some explosive political and corruption scandals undermine the credibility of the process and lead to its freezing. North Macedonia remains trapped in the bilateral dispute with Bulgaria, while Bosnia and Herzegovina is paralyzed by internal ethnic tensions and international institutional gridlock. Russia's war in Ukraine grinds into a protracted stalemate which clouds the country's prospects for EU accession. EU Member states find themselves divided over security risks, the financial costs of admitting Ukraine, as well as their position on Russia. The possible accession of Iceland leads to even deeper dissatisfaction among candidate countries, who blame the EU for political opportunism.

Simultaneously, the resurgence of nationalist and Eurosceptic parties sweeps across domestic legislatures. These forces successfully launch campaigns for the protection of national sovereignty and anti-immigration stance, thus framing enlargement as a direct threat to domestic markets and societal cohesion. The unanimity requirement of the enlargement process becomes an insurmountable barrier. This paralyzes the ability of the European Commission to further advance negotiations with any candidate country.

In addition, debates sparkle over the Union's long-term budget. With the plans of the 2028-2034 MFF to create a "Europe" pillar that would replace preexisting programs (such as the "Pre-Accession Program"), some Member States demand a reduction in assistance funds, presenting it as a waste of taxpayers' money. Others, primarily Eastern and South-Eastern Member States, maintain that these funds are crucial as a security buffer. Uncertainties with regards to the EU's assistance generate anxieties among governments and societies of the candidate countries.

In response to these developments, candidate countries experience democratic backsliding and a loss of political will. Countries like Russia and China actively offer alternative investments and partnerships, undermining the EU's position in the region and its economic leverage. This stagnation damages the international image of the candidate countries and shatters the geopolitical credibility of the EU. Mutual lack of trust and disappointment poison political will on both sides, making enlargement prospects very bleak for the years to come.

Implications for...

European security and regional stability

Candidate countries:
- Increased vulnerability to hostile influence of foreign actors;
- Possible resurgence of regional conflicts.

The EU:
- Instability and increased security risks at the EU borders;
- Increased pressure on migration management and border security if the candidate countries lose political will and the financial incentives to align with the EU;
- Lower geopolitical credibility for the EU as a security actor.

Economy

Candidate countries:
- Slowing down on some reforms and convergence with the EU economic standards;
- Possible increasing dependency on non-EU actors, such as China's infrastructure loans and the Gulf states.

The EU:
- Missed opportunity for the EU's global competitiveness by not integrating dynamic, lower-cost labour markets and not securing supply chains;
- Economic slowdown due to the lack of expansion to the new markets among neighbouring states.
- Possible increasing costs of political and economic crises on the EU's borders.

Democracy

Candidate countries:
- Lack of incentives to deliver on reforms and possible democratic backsliding;
- Frustration and disillusionment among civil society which performed the role of a watchdog.

The EU:
- The EU's transformative leverage undermined;
- Increase of illiberal tendencies within the EU.

Society and demography

Candidate countries:
- In the mid-term, younger and skilled workers will be emigrating, deprived of an optimistic vision of the future;
- Increasing burden on local health care, education, and the pension system due to emigration.

The EU:
- The EU fails to create a coordinated approach to immigration from candidate countries, as no perspective for enlargement and thus no freedom of movement for workers is included.

THREE "BLACK SWANS" CONSIDERED

Given the volatility of the geopolitical context and the unpredictability of domestic developments in EU Member States and candidate countries, we have also considered three lower-probability, high-impact "Black Swan" scenarios in this report.

The first such scenario concerns a sudden collapse of the current political establishment in Belgrade, triggered by massive pro-democracy protests. A new reformist government would prioritize domestic reforms, attempt to restore the rule of law, and unlock the accession path to the EU, thus breaking from Moscow's geopolitical influence. The EU would respond with a package of support to Serbia, potentially bringing it closer to regional frontrunners. The democratic breakthrough opens opportunity for Kosovo and its relations with the EU.

The second Black Swan refers to Moscow's defeat in the war and a window of opportunity for Eastern Europe and the South Caucasus. While we discount the idea that a removal or a sudden death of an autocratic leader would change the calculus, Russia's military defeat driven by decisive battlefield successes of Ukraine and the Kremlin's economic and military difficulties would shatter Moscow's ability to project regional power. This might lead to a window of opportunity for Belarus, where pro-democracy forces expressed willingness to pursue a possible EU path, and Georgia that might get a chance to restore its pro-EU trajectory.

Finally, a Russian military attack on an EU country during a period of tensions in transatlantic relationship would fundamentally alter European defence and, consequently, the enlargement dynamics. Such a credibility test of NATO's Article 5 could most likely take the form of a hybrid or limited incursion into Poland or eastern Estonia. If Trump's policy then leads to an ambiguous or delayed response from the US, the EU will be confronted with a security vacuum. In this context, the EU countries will likely achieve a high degree of political unity, driven by an existential threat to the Union itself. Yet, questions will remain on how to operationalise this unity and how to proceed with enlargement. It is possible that the EU would be forced to pivot towards a security and defence union and decide to rapidly incorporate Ukraine, Moldova as well as the Western Balkans to secure its Eastern and Southern flanks. Simultaneously, to safeguard its Northern Flank, the EU further includes its Arctic allies.

DEVELOPMENTS TO WATCH

The European Union

At the EU level, the European Commission's "pre-enlargement policy review" has remained on hold since late 2025, awaiting a favourable moment for publication. Once released, its proposals are likely to shape the future EU enlargement debate, even if they remain legally non-binding. Moreover, the October European Council will serve as a litmus test for whether the numerous non-papers currently circulating among Member States – including on accession treaty safeguards– will translate into concrete outcomes. Ultimately, Member States' positions on these issues could determine whether the current momentum behind enlargement can be sustained or whether the EU will miss this unique window of opportunity. **- Jonas Althoff, KAS Europe Office, Brussels**

Montenegro

Montenegro benefits from renewed momentum and might break the EU's non-enlargement cycle. However, to undergo substantial transformation, it will need to demonstrate a track record beyond the fast-paced adoption of EU-aligned

laws. It will also face new challenges in protecting its small labour market from brain drain, especially in sensitive sectors such as healthcare. **- Milena Muk, Public Policy Analyst, Montenegro**

Albania

Having opened all negotiating clusters, Albania's next challenge may be less about negotiations with Brussels and more about maintaining trust at home. As citizens become more vocal on issues such as transparency, accountability, environmental protection, and public consultation, expectations are rising alongside progress in the accession process. Whether reforms translate into meaningful improvements in how the country is governed may become one of the defining questions of Albania's European path. **- Iliriana Gjoni, Carnegie Europe, Brussels**

North Macedonia

North Macedonia remains at a crossroads. Continued uncertainty over EU accession risks weakening reform momentum, while the absence of political consensus on constitutional amendments keeps negotiations from advancing. The next phase will require both political leadership and credible/tangible reform delivery. **- Julijana Karai, European Policy Institute, North Macedonia**

Serbia

Two parallel processes are unfolding: the strongest civic awakening in a generation, which could break Serbia's long cycle of democratic backsliding, and a renewed appetite for enlargement in Brussels. To catch the accelerating enlargement train, Serbia will need to commit to European values - domestically, by holding free and fair elections, and internationally, by standing firmly within a European partnership and fully aligning with the CFSP. The risk to watch is the opposite: that Serbia is waved aboard despite failing to meet democratic standards, turning enlargement into a reward for geopolitical loyalty rather than genuine reform. **- Ivan Đurić, Center for Research, Transparency and Accountability (CRTA), Serbia**

Bosnia and Herzegovina

Bosnia and Herzegovina's EU trajectory stagnated after receiving the greenlight to start accession talks in 2024, as conditions required to move forward remains unmet. Meanwhile, the domestic political environment is marked by instability, with last year's Dodik's dismissal and the recent resignation of the High Representative. The future of the OHR, and the political power balance after the general elections in October this year will be key issues to watch. **- Berta López Domènech, European Policy Centre, Brussels**

Ukraine

Timing and outcome of both presidential and parliamentary elections in Ukraine is of utmost importance in the context of European integration. Presently, political unanimity over Ukraine's EU path remains (albeit with a backlog in legislative work), however war protraction can substantially undermine democratic progress in the years to come. **- Maryna Yaroshevych, Ukrainian Prism**

Moldova

The public support to the EU accession in Moldova could vary and difficult reforms might affect the support to the pro-EU government. Delays in accession process could raise safety alert among the population. The effectiveness of countering Russia's military presence and continue disinformation is key in the upcoming years. **- Maria Gargano, Egmont Institute, Brussels**

Georgia

If the Georgian Dream remains in power until 2029, Georgia will remain an EU candidate country in "name only", with relations with the EU either deteriorating further or partially normalising if a changed geopolitical context, such as a weakening of Russia, forces the government to make tactical concessions and roll back repressive legislation. However, the opening of accession negotiations and any meaningful steps toward EU integration will be effectively impossible without a change in government and renewed progress toward democracy and European integration **- Anastasia Mgaloblishvili, Free University Berlin**

Turkey

Turkey's accession process is officially at a standstill, and for quite some time, the elephant in the room has been whether it might be ended altogether. Recent indications of even further democratic backsliding, as observed by the European Parliament in June 2026, add to this. At the same time, productive EU-Turkey relations remain a strategic necessity, especially in areas such as migration and security, and have gained new momentum as of late. The key question is whether a closer and more durable, values-based partnership can be established in the long run, and what alternatives to EU accession could help achieve this. **- Friedrich Püttmann, KAS Europe, Brussels**

Kosovo

Kosovo's European trajectory remains closely linked to the future of the normalization process with Serbia. As confidence in the dialogue has weakened and implementation gaps have widened, the ability of the European Union to act as a credible and even-handed facilitator will be critical to restoring trust in the process. At the same time, recurring political deadlock has highlighted the difficulty of building consensus around major national priorities. In the years ahead, Kosovo's progress may depend as much on its ability to build sustainable consensus at home as on its ability to move the normalization process forward. **- Iliriana Gjoni, Carnegie Europe, Brussels**

Annex I – Status of EU Accession Process (as of June 2026)

Country	Applied	Candidate Status	Negotiations opened	Chapters status
Montenegro	2008	2010	2012	All 33 chapters opened 16 provisionally closed
Albania	2009	2014	2022	All 33 chapters opened 0 provisionally closed
North Macedonia	2004	2005	2022	0
Serbia	2009	2012	2014	22 chapters opened 2 provisionally closed
Bosnia and Herzegovina	2016	2022	2024	0
Ukraine	2022	2022	2024	5 chapters opened
Moldova	2022	2022	2024	5 chapters opened
Georgia	2022	2023	Not opened (accession process unilaterally suspended by Georgian government until 2028)	-
Turkey	1987	1999	2005	16 chapters opened 1 provisionally closed
Kosovo	2022	-	-	-

Glossary

Term	*Definition*
Associate membership	An intermediate status below full EU membership, allowing a country to participate in selected EU policies or structures without the full rights and obligations of membership.
Black swan	An unexpected and high-impact event that can significantly change the assumptions or direction of the enlargement process.
Cautious integration	A scenario in which divergent Member State views lead to a gradual, incremental, and merit-based enlargement process, with general support for enlargement but limited appetite for rapid accession.
Concentric circles model	A model of European integration based on different levels of participation or membership, moving away from a simple in/out model of accession.
Conditional pragmatism	A Member State position that supports enlargement when candidate countries meet conditions and when practical EU interests are served.
Differentiated membership	A scenario in which geopolitical openness leads the EU to grant early political or security membership to some candidate countries while reforms continue under strict post-accession conditionality.
Domestic scepticism	Doubts or opposition within EU Member States toward further enlargement, often linked to political, economic, institutional, or electoral concerns.
Dual-track accession process	An approach combining full membership for frontrunner candidates with gradual integration for less advanced candidates.
Dynamic enlargement	A scenario in which strong Member State consensus enables a dual-track accession process, combining full membership for frontrunner candidates with gradual integration for less advanced candidates.
Enlargement frozen	A scenario in which domestic scepticism and weak reform progress lead to a systemic freeze of the enlargement process, reducing the EU's transformative leverage.
Geopolitical openness	A Member State position that supports enlargement as part of a broader geopolitical transformation and strategic response to future enlargement rounds.
Merit-based approach	An accession principle where candidate countries progress according to their reform performance and fulfilment of EU conditions.
Structural scepticism	A Member State position focused on EU internal reform, institutional capacity, and caution or opposition toward further enlargement.
Traditional approach	A politically driven accession model focused on a merit-based approach to full membership.
Transformative leverage	The EU's ability to encourage political, legal, and institutional reforms through the prospect of accession or closer integration.

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