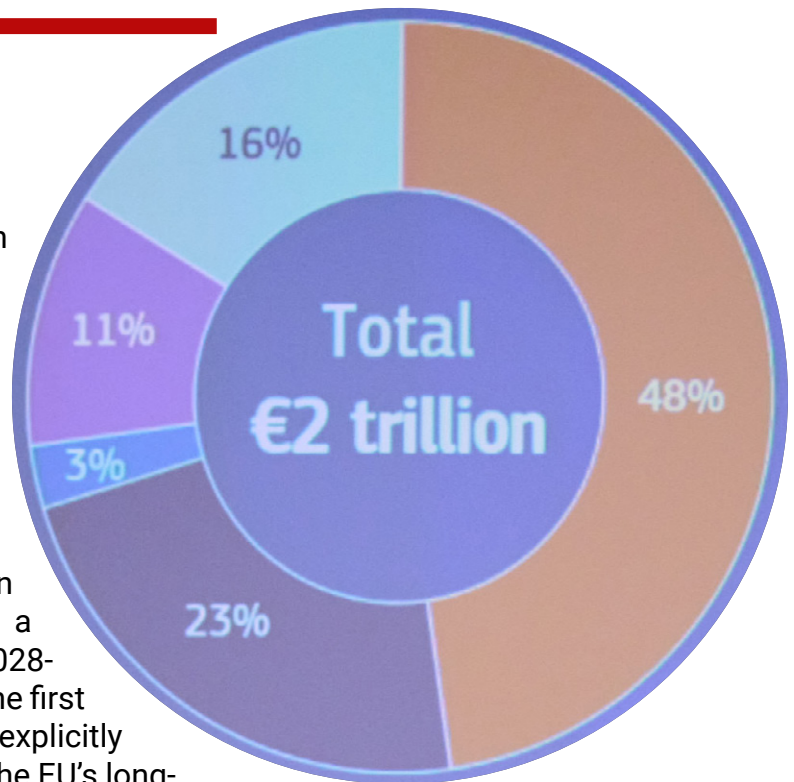




FINANCING ENLARGEMENT VIA THE 2028-2034 MFF

ABSTRACT

This brief intends to explain how the European Commission's proposal for the 2028-2034 Multiannual Financial Framework (MFF) addresses EU enlargement, which is once again a paramount concern following a decade of stagnation and in light of Russia's war in Ukraine. With Ukraine, Moldova, and Georgia submitting EU membership applications, and amid growing awareness of the risk of destabilisation in the Western Balkans if the EU does not demonstrate a genuine commitment to enlargement, the 2028-2034 MFF marks a watershed moment: it is the first proposal for an EU multiannual budget to explicitly consider the pressure that will be placed on the EU's long-term budget by incorporating countries with weaker economies, incomplete governance reforms, and urgent reconstruction needs. This policy brief addresses three key issues: what funding is dedicated to enlargement; whether it is sufficient to meet the challenge; and whether the proposal adequately prepares the EU for the inclusion of new Member States.



AUTHOR

FEDERICO BACCINI
Freelance Journalist,
Founder of The New Union Post



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Foundation for European Progressive Studies (FEPS)

European Political Foundation – N° 4 BE 896.230.213
Avenue des Arts 46
1000 Brussels (Belgium)
www.feps-europe.eu
X/Instagram: FEPS_Europe
Bluesky: @feps-europe.eu



CeSPI

Piazza Venezia, 11
00187 Rome (Italy)
www.cespi.it
X/Instagram: @CeSPI_Roma



Friedrich-Ebert-Stiftung

Dialogue Southeast Europe
Kupreška 20, 71000 Sarajevo, Bosnia and Herzegovina
<https://soe.fes.de/index.html>
X/Instagram: @FES_SOE



Foundation Max van der Stoel

Leeghwaterplein 45, 5e verdieping
2521 DB Den Haag (Netherlands)
www.foundationmaxvanderstoel.nl
X/Instagram: @FMS_Foundation



Fondation Jean-Jaurès

12 Cité Malesherbes
75009 Paris (France)
www.jean-jaures.org
X/Instagram: @j-jaures

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Kalevi
Sorsa
Foundation

Kalevi Sorsa Foundation

Siltasaarencatu 18–20 C, 6. Kr
00530 Helsinki (Finland)
www.sorsafoundation.fi
X/Instagram: @SorsaFoundation



**OLOF PALMES
INTERNATIONELLA
CENTER**

Olof Palme International Center

Sveavägen 68, 5 tr
Stockholm (Sweden)
www.palmecenter.se
X/Instagram: @palmecenter



PROGRESIVA

Progresiva

Trubarjeva cesta 79
1000 Ljubljana Slovenia
<https://www.progresiva.si>
X/Instagram: @d_progresiva



RennerInstitut

Karl-Renner-Institut

Karl-Popper-Straße 8
A-1100 Vienna (Austria)
www.renner-institut.at
X/Instagram: @Rennerinstitut



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Introduction

With a proposed budget of €1.9 trillion, the 2028-2034 Multiannual Financial Framework (MFF) represents an ambitious financial plan for the European Union, both in its scale and scope. At its core, the framework acknowledges that EU enlargement is a pressing geopolitical reality that demands adequate funding. The prospect of Ukraine's accession has restored prominence to an issue that member states had, by and large, set aside in recent years. Meanwhile several candidate countries in the Western Balkans and Eastern Europe are now engaged in a revitalised accession process requiring not only political commitment but also substantial economic support. The European Commission's proposal embeds enlargement within the Union's financial architecture through the new Global Europe instrument, allocating approximately €43 billion to the "Enlargement and Neighbourhood East area" pillar, and including a revision clause to adjust the budget in response to future accessions. However, despite its ambitious goal, the proposal leaves several important concerns unresolved. Enlargement funding must compete with other external action priorities; Ukraine's extensive reconstruction needs are only partially addressed; migration conditionality risks destabilising reform trajectories in the candidate countries, as it may jeopardise pre-accession programmes otherwise focused on rule of law and economic reforms. And while the new approach of enhanced flexibility – allowing allocations to be shifted more easily from one priority to another – is presented as an advantage, it also carries the potential for unpredictability and challenges around political negotiation.

Key provisions of the 2028-2034 MFF proposal

The proposed 2028-2034 MFF¹ amounts to €1.9 trillion in commitments. This represents an increase compared with the 2021-2027 framework – €1.1 trillion at 2018 prices – and reflects the EU's ambition to respond to a more complex global environment. The new long-term budget is built on four pillars: (1) economic, social and territorial cohesion, agriculture, rural and maritime prosperity and security; (2) Global Europe; (3) competitiveness, prosperity and security; (4) administration. It should be recalled that the proposal must still be discussed, negotiated and approved by the Council and the European Parliament as co-legislators.

Global Europe, as outlined by the Commission, is the pillar dedicated specifically to external action, with an overall allocation of €215.2 billion.² Almost the entire sum will be channelled through a new fund – the Global Europe instrument – which is set to receive €200.3 billion, more than double the €98.4 billion available under the current 2021-2027 MFF (at 2018 prices).³ The Global Europe instrument represents a major innovation in the EU's external financing, as it absorbs several existing funding streams, including the NDICI-Global Europe instrument, the Instrument for Pre-Accession Assistance (IPA III), the Reform and Growth Facilities for both the Western Balkans and the Republic of Moldova, and the Ukraine Facility.

According to the proposed Regulation establishing Global Europe,⁴ the four guiding principles of the new regulation are:

- The simplification of the architecture of the external heading "through one main instrument for EU external action and with a horizontal Performance Regulation for the

entire MFF, covering monitoring, reporting, evaluation and communication”;

- The coherence of action, “with increased geographisation, more focus on coherence, consistency and complementarity between internal and external programmes, as well as a stronger Team Europe approach”;
- The flexibility of the instrument, including “the possibility to adopt delegated acts, and increasing them through the reduction of targets and easier budgetary transfers between and within pillars”;

- The impact of EU action, “with a strengthened toolbox allowing to build comprehensive packages, with a streamlined and more efficient guarantee and blending framework, and a stronger promotion of European interests.”

The Global Europe instrument is designed to support a wide range of external action policies, including enlargement, neighbourhood policy, international partnerships and humanitarian aid – all of which fall within the external action

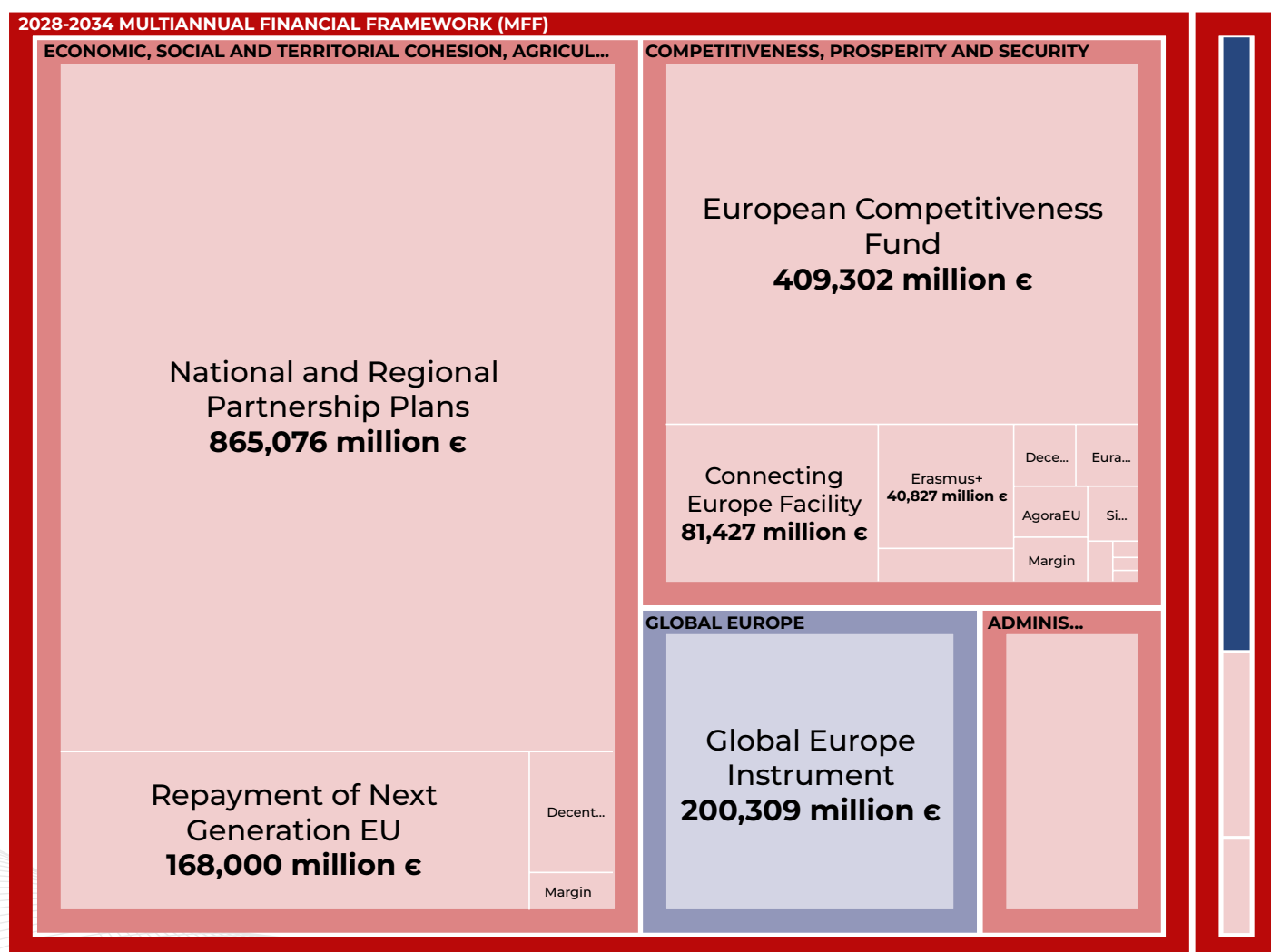


Figure 1. EU enlargement provisions in the proposed 2028-2034 MF: How the next EU budget may finance the “Global Europe” pillar

Source: <https://newunionpost.eu/2025/08/26/proposal-2028-2034-mff-eu-enlargement/>



The fact that the Global Europe Instrument now incorporates the Reform and Growth Facility for the Western Balkans, while at the same time placing the region within the broader – and more generic – category of ‘Enlargement and Eastern Neighbourhood’, may raise concerns about a possible dilution of attention towards the Western Balkans in the next MFF.



spending area of the current 2021-2027 MFF. It is organised around five geographic pillars: Enlargement and Neighbourhood East; Middle East, North Africa and the Gulf; the Americas and the Caribbean; Asia and the Pacific; and Sub-Saharan Africa, as well as one global pillar. Each of these includes both programmable and non-programmable components.

How enlargement is included in the new instrument

Within the new €215.2 billion Global Europe instrument, the “Europe: Enlargement and Neighbourhood East” pillar is allocated €43.1 billion.⁵ This geographic pillar covers all current candidate and potential candidate countries: Albania, Bosnia and Herzegovina, Georgia, Iceland, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, Türkiye and Ukraine, as well as the Neighbourhood East partners, Armenia and Azerbaijan. However, it also includes other non-EU countries: Andorra, Liechtenstein, Monaco, Norway, San Marino, Switzerland, the United Kingdom and the Vatican City. According to Annex I⁶ of the proposal, EU funds under this pillar may also “be directed to Russian and Belarusian independent civil society and free

media, in full compliance with Union restrictive measures.”

The fact that the Global Europe instrument now incorporates the Reform and Growth Facility for the Western Balkans, while at the same time placing the region within the broader – and more generic – category of “Europe: Enlargement and Neighbourhood East,” can raise concerns about a possible dilution of attention towards the Western Balkans in the next MFF. The risk is that the EU’s focus may shift towards newer candidates such as Moldova and Ukraine, at the expense of a region that has been waiting for EU membership for more than two decades. In principle, funding opportunities should be equally accessible to all countries engaged in the enlargement process, being conditional upon the fulfilment of specific reform plans, thereby reflecting the approach adopted by the Commission with the absorption of the Reform and Growth Facility for the Western Balkans. At the same time, stakeholders in the region may interpret the absence of a distinct regional focus as a sign that the EU is not fully committed to completing the enlargement process in the Western Balkans, even within the forthcoming budgetary period.

In relation to Enlargement and the Neighbourhood East partners, the European Commission is expected to adopt an implementing act “establishing uniform conditions for implementing this Regulation, in relation to the design and content of the performance-based plans, performance, structures and control systems to be set up in preparation for accession, also in the context of the management of structural, agricultural and cross-border cooperation funds.” Moreover, financial assistance in the form of a policy-based loan may be provided to partner countries implementing performance-based plans “where relevant”. As highlighted by Eric Maurice, Policy

Analyst at the European Policy Centre (EPC), the proposal represents a “two-fold shift from the past”: from a programme-based to a policy-based budget, and from cost-based payments to performance-based disbursements, supported by specific performance indicators to monitor and evaluate the effectiveness of EU spending.⁷ However, the shift from *ex ante* control – where the Commission justified the use of multiannual programmes in advance – to *ex post* control risks reducing formal oversight and democratic

accountability, including by the European Parliament.

As in previous frameworks, the 2028-2034 MFF includes a specific revision clause addressing the potential accession of new member states. According to Article 11 of the Regulation laying down the MFF for 2028 to 2034, “in the event of new Member States acceding to the Union, the MFF shall be revised accordingly pursuant to the relevant Accession Treaties, to take account

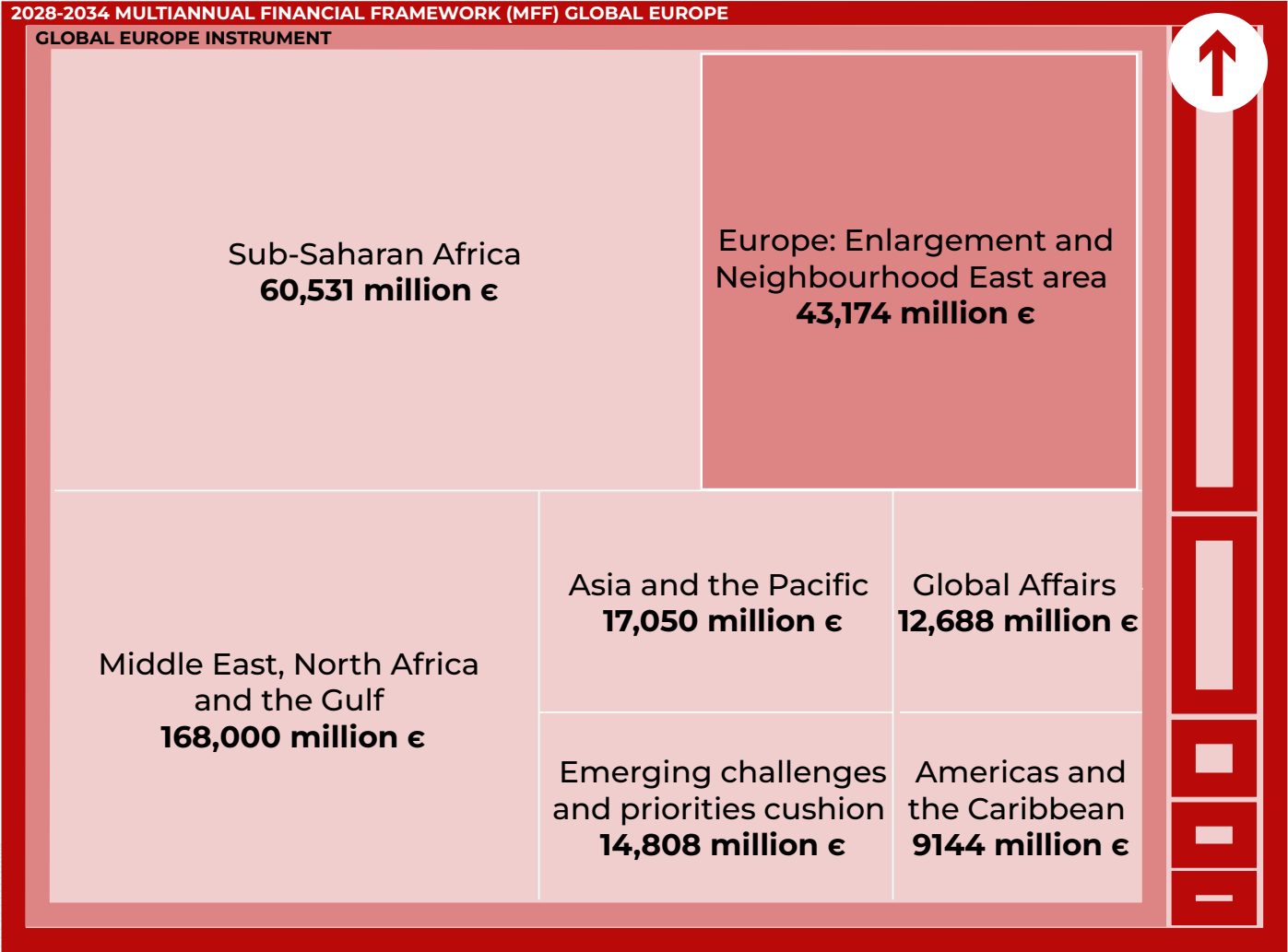


Figure 2. EU enlargement provisions in the proposed 2028-2034 MF: How the next EU budget may finance the “Global Europe” pillar

Source: <https://newunionpost.eu/2025/08/26/proposal-2028-2034-mff-eu-enlargement/>



Ukraine represents both the greatest opportunity and the most complex challenge for EU enlargement, as the scale of the country's reconstruction and pre-accession needs has direct implications for the next MFF.



of the expenditure requirements resulting from such accession to the Union.”⁸ With nine candidate countries (and one potential candidate, Kosovo) at different stages of accession negotiations, and with Montenegro, Albania and Moldova committed to completing these negotiations before 2030, questions about the impact of enlargement on the overall EU budget have become increasingly pressing. In this scenario, a revision of the MFF is “logical”, according to European Commission President Ursula von der Leyen, who emphasised the potential need for negotiations “depending on the size of the country” joining the EU.⁹ Such negotiations would also address the phase-in of cohesion and agricultural payments, responding to concerns raised by several current member states about the potential budgetary impact of Ukraine’s accession.¹⁰

Ukraine: A special case

Ukraine represents both the greatest opportunity and the most complex challenge for EU enlargement, as the scale of the country’s reconstruction and pre-accession needs has direct implications for the next MFF. The Regulation establishing Global Europe specifies that, “given the magnitude and unpredictability of the needs, reconstruction and pre-accession assistance for Ukraine will be financed above the MFF ceilings (the so-called ‘headroom’ of the MFF) and be implemented through Global

Europe.”¹¹ This approach translates into a proposed allocation of €100 billion, designed to ensure continuity with the Ukraine Facility’s model, comprehensively address short-, medium- and long-term requirements, and integrate the country’s accession path with post-war reconstruction priorities. The Commission emphasises that this structure aims to “strike a balance between providing credible support to Ukraine in an uncertain context while protecting the Instrument’s ability to deliver on needs and priorities in other geographical areas.”

While the mechanism raises no formal accountability concerns, the greater challenge lies in the potential political disagreements among member states. Under the current Ukraine Facility, implementing powers were “exceptionally conferred” to an ad hoc Council working party (AHWP RESUA),¹² which has so far avoided significant deadlocks in approving macro-financial assistance. Nevertheless, some member states remain sceptical about the size and scope of the support to Ukraine. Hungary, for instance, has openly expressed reservations, highlighting the potential for vetoes or prolonged political debates that could delay disbursement or complicate decision-making, mirroring its ongoing obstruction of Ukraine’s accession negotiations.

The 2028-2034 MFF proposal seeks to mitigate these risks by placing Ukraine’s support above the MFF ceiling while fully integrating a new Ukraine Reserve into the Global Europe instrument. As a result, implementing decisions do not require formal Council approval and instead follow the standard comitology procedure, in which the Commission adopts technical decisions with the assistance of committees of member state representatives.¹³ This ensures that, although political discussions may still occur, the allocation process is largely depoliticised, reducing the risk of vetoes or procedural deadlocks. At the same



Figure 3. EU enlargement provisions in the proposed 2028-2034 MF: How the next EU budget may finance the “Global Europe” pillar

Source: <https://newunionpost.eu/2025/08/26/proposal-2028-2034-mff-eu-enlargement/>

time, the arrangement allows the EU to provide substantial and predictable support to Ukraine, reflecting both the scale of the reconstruction challenge and the strategic importance of its accession, without compromising the Union’s capacity to fund external priorities elsewhere, owing to the use of two separate funding baskets.

Addressing current and future challenges

By unifying external action instruments, the EU seeks to enhance coherence, flexibility,

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and efficiency. For enlargement, this means that pre-accession funding is no longer separated from broader neighbourhood policy but is instead part of a larger envelope.¹⁴ The Commission's intention is to shift resources quickly in response to crises, reduce duplication, and offer a clearer strategic framework for external spending. However, it also creates risks. Enlargement funds must now compete directly with other pressing priorities, such as humanitarian assistance, development aid, and climate action. Without ringfencing, enlargement allocations may be diluted during negotiations or diverted in response to crises. Global Europe, therefore, provides a stronger framework for coordination but does not in itself guarantee predictable resources for enlargement.



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The €43.1 billion allocated for enlargement under the 2028-2034 MFF, while substantial in absolute terms, is modest relative to the scale of needs across multiple candidate countries. Over the last two decades, the EU has provided pre-accession support through the Instrument for Pre-Accession Assistance (IPA), with three successive phases: IPA I (2007-2013) received €11.5 billion, IPA II (2014-2020) €12.8 billion, and IPA III (2021-2027) €14.162 billion, all at



While the allocation in the new MFF represents an apparently significant increase, it must now cover a far larger and more diverse set of countries, many of which face profound economic, infrastructural, and governance challenges, and are not limited to formal candidates.



current prices.¹⁵ While the allocation in the new MFF represents an apparently significant increase, it must now cover a far larger and more diverse set of countries, many of which face profound economic, infrastructural, and governance challenges, and are not limited to formal candidates. In this context, the apparent increase relative to the current EU budget must be assessed in light of both country-specific allocations – determining how much will actually be available for countries previously covered under IPA – and the range of priorities that need to be financed, whether specifically related to enlargement or other external action objectives, such as humanitarian aid, climate adaptation, crisis response, and development projects. A final assessment of the future allocated budget will depend on the outcome of negotiations among co-legislators, as some member states may seek to reduce the overall amount proposed by the Commission.

Regarding the new architecture of the EU budget, the 2028-2034 MFF places significant emphasis on flexibility, reflecting lessons learned from recent crises such as Covid-19 and the war in Ukraine. After years of instability in its neighbourhood and beyond, the geopolitical stakes for the EU are now significantly higher than when the 2021-2027 MFF was adopted. According to the Commission's proposal for

the Regulation establishing Global Europe, “this changing geopolitical landscape and a string of poly-crises have exposed some architectural weaknesses in the design of the external financing instruments.”¹⁶ These include financial and operational barriers between different instruments, limited flexibility to respond to evolving priorities, and insufficient interplay between enlargement and neighbourhood policies. For this reason, the Commission argues that “there are therefore gains to be made, in terms of overall synergy and flexibility, in ensuring a common source of funding for most of the Union external action instruments.” Yet this emphasis on flexibility remains a double-edged sword. On one hand, with candidate countries progressing at different speeds, such an approach can bring benefits to the enlargement process. These include enhancing coherence across policy areas, allowing financing to be adjusted in real time, supporting unexpected breakthroughs, and enabling swift responses to external shocks. On the other hand, it also introduces new risks. Reliance on off-budget arrangements can undermine predictability for candidate countries, making it harder for them to plan reforms and align long-term strategies with EU expectations.

Finally, it should be noted that the introduction of migration conditionality in external funding reflects growing political pressures within the EU – particularly the strong push of some member states to link financial cooperation to the readmission of irregular migrants. According to Article 12.3 of the Regulation establishing the Global Europe instrument, “where the Commission services, in consultation with the EEAS, identify serious shortcomings in a partner country, in particular regarding the obligation to readmit its own nationals from Member States, the Commission may suspend payments or the implementation of a programme.” While humanitarian assistance is explicitly exempted, enlargement support is not, creating significant

risks for the credibility and coherence of EU external action.¹⁷ Tying financial disbursements to migration cooperation through a “punitive approach” – as noted by the European Council on Refugees and Exiles¹⁸ – may disrupt pre-accession programmes otherwise focused on governance, rule of law, and economic reforms, thereby undermining trust in the accession process. Moreover, as the decision to suspend funds depends on EU policy choices rather than negotiated benchmarks, it could be perceived by candidate states as arbitrary or politically motivated. In the longer term, such conditionality risks weakening the EU’s image as a predictable and principled partner, potentially pushing some countries to seek closer ties with alternative geopolitical actors offering less conditional support.

Policy recommendations

The 2028-2034 MFF represents a significant advance in embedding enlargement within the EU’s financial and institutional framework. The consolidation of external instruments into the new Global Europe instrument, the earmarking of €43.1 billion for the “Europe: Enlargement and Neighbourhood East” pillar, the introduction of revision clauses to accommodate future accessions, and the incorporation of flexible financing mechanisms, all reflect a proactive effort to anticipate a new wave of enlargement. For the first time in over a decade, the EU explicitly recognises that accession candidates face urgent and complex needs, and that their integration will place substantial pressure on the Union’s next long-term budget.

Yet the proposal remains insufficient in several respects. While €43.1 billion is a notable allocation, it is modest relative to the scale of needs across multiple partners, including not only the candidate countries but also Neighbourhood East partners and other non-EU

states. Moreover, these funds risk being spread thinly across multiple priorities, as enlargement financing under the Global Europe instrument must compete with other pressing external action objectives. In this context, the allocation, though politically significant, is unlikely to fully address the substantial, multi-dimensional challenges associated with integrating a new wave of member states into the Union. Therefore, clearer earmarking of the funds specifically dedicated to what is currently covered by the Instrument for Pre-accession Assistance (IPA) should be pursued, so that expenditure can be properly tracked and this priority is demonstrably and effectively financed.

The inclusion of a revision clause – allowing the MFF to be adjusted in the event of new accessions – represents a positive and forward-looking feature of the Commission's proposal. It acknowledges that enlargement may occur during the budgetary cycle and that existing ceilings are unlikely to accommodate the full fiscal impact of new members. However, the practical effectiveness of this clause remains uncertain. Any budget revision requires unanimity among member states, a condition that can prove politically challenging and time-consuming. Furthermore, in the absence of a dedicated enlargement reserve, revisions may be too slow or politically contentious to respond adequately to sudden or accelerated accession scenarios, potentially leaving the Union underprepared to meet the financial demands of integrating new members in a timely and effective manner.

Ukraine's reconstruction and pre-accession needs are unprecedented in both scale and urgency, reflecting the combined challenges of post-war rebuilding and institutional alignment with EU standards. To address this, the Commission proposes €100 billion in loans financed "above the MFF ceiling" through the

Global Europe instrument. While this mechanism mitigates some procedural risks – such as vetoes or deadlocks, by relying on the technical comitology procedure – it remains politically sensitive, with some member states likely to oppose the scale and scope of support during negotiations. The arrangement highlights the EU's attempt to balance predictable assistance for Ukraine with the flexibility required to respond to evolving political and fiscal challenges, while also illustrating the limitations of the EU budget framework in fully safeguarding high-priority enlargement needs.

To ensure enlargement success, the EU must go further. Funding for enlargement should be increased and ringfenced to safeguard it from competition with other external priorities. Conditionality rules – particularly those linking funding to migration cooperation – should be rejected to prevent prioritising short-term political leverage over the pursuit of genuine, sustainable reforms. A balance between flexibility and predictable enlargement funding must be sought, so that enhanced responsiveness does not risk undermining the stability and credibility of the Union's financial architecture. Institutional capacity within the EU must also be strengthened to manage the complexity of multiple simultaneous accessions, particularly in administering structural, agricultural, and cross-border programmes.

Enlargement should be viewed not as a cost but as a strategic investment in the EU's stability, resilience, and long-term prosperity. The 2028-2034 MFF provides a foundational framework for such an investment, offering coherence, flexibility, and targeted support. Yet without decisive improvements – both financial and institutional – the European Union risks falling short of one of its most transformative opportunities in decades.

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About the author



FEDERICO BACCINI

Federico Baccini is a Brussels-based freelance journalist. After four years as the editor at *Eunews* responsible for coverage of the EU's foreign and digital policy, he now works as a correspondent for *Osservatorio Balcani Caucaso Transeuropa* and *Radio Popolare*. He also founded *The New Union Post*, an online magazine dedicated to EU enlargement. His work specialises in EU policies relating to the Western Balkans, the South Caucasus and Eastern Europe.

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About the Foundation Max van der Stoel

The Foundation Max van der Stoel (FMS) is an independent foreign foundation affiliated to the PvdA. It works for democratisation in the EU's neighbouring countries, a fairer Dutch and EU policy towards developing countries, and to stimulate public debate on these issues in the Netherlands.

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About the Kalevi Sorsa Foundation

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Olof Palme International Center is the Swedish labour movement's umbrella organisation for international solidarity and advocacy. The organisation works globally for democracy, human rights, peace and social justice, in the spirit of Olof Palme.

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About Progresiva

The Association for the Expansion of Political Space Progresiva, or Progresiva for short, is a voluntary, autonomous, Slovenian non-profit association dedicated to the development of progressive social democracy. Progresiva was founded in May 2015.

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About the Karl-Renner-Institut

The Karl-Renner-Institut is the political academy of the Austrian Social Democratic Party. It is a forum for political discourse, a centre for education and training and a think tank on the future of social democracy.

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ON SIMILAR TOPICS

POLICY BRIEF
February 2025

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POLITICAL PARTIES IN THE EU AND THE CHALLENGES OF ENLARGEMENT



ABSTRACT

Today, enlargement policy is not a base for building electoral consent for any European party – quite the opposite. It is also a highly technical field where political propaganda can easily manipulate public opinion. Strong fears around new races to the bottom in the sphere of democracy and labour relations around competition for scarce resources or migration is a strategy for gaining votes in most EU countries. Yet, given the EU member states' role in the decision-making around enlargement, the role of national political parties in this policy can be crucial. This policy brief is an enquiry into European national political parties' positions on EU enlargement. It was compiled by gathering information from party programmes, parliamentary debates, news media and think-tank sources. In addition, it relies on interviews with a number of experts and journalists with specific subject matter expertise. It covers selected (non-social democratic) political parties in 13 of 27 member states, chosen on the basis of their relevance to the enlargement process.

AUTHOR
LUISSA CHIODI
Director of Governance Studies
Caucaso Trans Europa (CBCT/CC)

Balkan Focus

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POLICY BRIEF
February 2025

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PROGRESSIVE STUDIES

MOVING TOWARDS AN INCLUSIVE GREEN AGENDA IN THE WESTERN BALKANS



ABSTRACT

This policy brief examines the attempts of the Western Balkans (WB) to transition from a carbon-based to a carbon-free economy, highlighting the role in this of the European Union's (EU) Green Agenda, introduced in 2020 as part of the EU's broader Green Deal. The Green Agenda provides a framework for aligning the region with EU environmental goals, even though the countries of the WB are not themselves EU members. The brief explores how the Green Agenda contributes to the WB's integration in the Union through environmental reforms and the alignment of the region's economic and institutional systems with EU standards. Progress has been made in the WB in adopting renewable energy sources, climate adaptation strategies and legislative changes, but significant challenges remain. These include coal dependency, inadequate waste and water management, air pollution and energy poverty. This brief identifies areas for improvement, stressing the need to implement a more inclusive approach and to foster multilevel governance in the pursuit of enhanced transparency and accountability. Additionally, it emphasises the importance of addressing the transition fatigue that may be a consequence of pursuing EU accession. The analysis concludes by offering policy recommendations for strengthening the implementation of the Green Agenda and for ensuring that the region's transition to sustainability is fair, equitable and aligned with EU integration goals.

AUTHOR
ERBILIN BERISHA
Assistant Professor in the Department of Regional and Urban Studies and Planning, Politecnico di Torino, Italy

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EXTERNAL INFLUENCES IN THE WESTERN BALKANS: WHERE ARE WE AT?



ABSTRACT

Alongside the EU accession path, other third countries have managed to create the conditions to expand their spheres of influence to the Western Balkans. Ethnic fragmentation, weak economic conditions and widespread cases of corruption created fertile soil for non-EU-aligned actors to enter regional dynamics and attempt to fill regional power vacuums. Multiple strategies have been adopted. These go from the use of diplomacy to direct financial investments; from promoting cultural adherence to establishing forms of economic dependence. The main actors involved in the process are Russia, China, Turkey and the Gulf States, all using different tools and capacities to pursue their objectives. The EU complex principles of conditionality and long negotiation processes have worsened the institutional and motivational obstacles to pursuing a smooth European path. Nevertheless, the conflict in Ukraine and the most recent global development, have led the EU to overcome political and institutional minutiae to work on reaching its main regional interests: security and stability. This paper focuses on the presence of external actors in the Western Balkan region, the interests and ambitions behind their manoeuvres and the direct consequences for the European Union.

AUTHOR
ANGELICA VASCOTTO
Post-European Fellow at the European Council on Foreign Relations (ECFR)

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LABOUR MIGRATION IN THE WESTERN BALKANS

CONSEQUENCES FOR THE REGION'S DEMOCRATIC LIFE



ABSTRACT

Labour migration is a phenomenon that is rooted in the structural problems of Western Balkans societies, such as the high rate of youth unemployment, a poorly performing labour market and inadequate welfare systems.

The phenomenon has severe repercussions not only on the quality of internal services, such as healthcare and highly qualified jobs, but also on the democratic stability of the countries analysed.

This policy brief provides an overview of the causes and consequences of labour migration from the Western Balkans, concluding with recommendations for the region's national governments and for the European institutions on how to jointly address the problem.

AUTHOR
SABINA DE SILVA
Project Coordinator at the Centro Studi di Politica Internazionale (CeSPI) for the Balkan Focus project

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CeSPI

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THE EUROPEAN POLITICAL COMMUNITY: INFORMALITY AS A KEY TO SUCCESS



ABSTRACT

The EPC has been established to create 'strategic intimacy' among European countries, at a time when Russian aggression against Ukraine demanded a show of unity and geopolitical resolve. Its lack of standing structures, institutions, budget and even final declarations should be taken as added value and not as a liability. Indeed, the EPC should not be considered as a loose replica of the EU or as a waiting room for EU aspiring members. Any comparison with the EU fails to capture the real added value of the EPC – an informal format allowing European leaders to freely discuss open issues at 'multilateral' level on the sidelines of the event, without the pressure of political consensus. While European leaders should resist the calls to institutionalise the EPC, they should also be aware of the risk of increasing fatigue. If this format fails to deliver tangible results in the long run, in order for the EPC not to become just a big photo opportunity for the whole European continent, organising host countries (which rotate on a six-month basis on the EU/non-EU country principle) should spend their political capital to keep the EPC a valid geopolitical institution with its distinctive features.

AUTHORS
LADA VETININI and SABINA DE SILVA

Balkan Focus

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SERBIA'S CIVIC AWAKENING: THE 2024-2025 STUDENT PROTESTS IN FOCUS



ABSTRACT

The 2024-2025 student protests – triggered by the fatal collapse of the Novi Sad train station canopy – have become the most formidable civic challenge to Serbia's authoritarian trajectory to date. This policy brief traces their evolution, dividing it into five distinct phases. Phase 1 began in November 2024 with spontaneous gatherings and student blockades demanding accountability. Phase 2, in January 2025, featured mass mobilisations, clashes and the eventual resignation of the prime minister. In Phase 3, students staged symbolic cross-country marches and the largest protest in Serbia's history on 15 March, which was cut short by the suspected use of a sonic weapon. Phase 4 saw the internationalisation of the movement's activities, as students cycled to Strasbourg and ran relays to Brussels, sending a message that Serbia's democratic crisis requires the EU's engagement, not indifference. As the regime showed no serious intention of meeting their demands, the movement entered Phase 5, marking a shift from a catch-all civic movement to political engagement. As the crisis is nowhere near its end, this brief concludes with policy recommendations for a more proactive EU response, arguing that the protests may signal a turning point in Serbia's democratic development and reshape its European future.

AUTHOR
STRAHINJA SUBOTIĆ
Programme Manager and Senior Researcher at the European Policy Centre, Belgrade

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