PRESPA ИНСТИТУТ INSTITUTE

THE COST OF STANDING STILL

North Macedonia and
the 2026 Enlargement Package



THE COST OF STANDING STILL

North Macedonia and the 2026 Enlargement Package

Policy Analysis

Publisher: **PRESPA Institute – Skopje**

About the publisher: **Andreja Stojkovski, Executive Director**

Authors: **Andreja Stojkovski, PRESPA Institute**

Design and Layout: **Brigada Design dooel**

Skopje, November 2026

Contents

1. Brussels Prepares for a Wider Union **4**

2. Exposing the Weaknesses **5**

Full Alignment abroad, Weak Oversight at home 5

New Laws, Few Results 6

Media Freedom Stalls as Interethnic Relations Hold 7

3. Will the Reforms last? **8**

4. Four Reports tracing a Slowdowno **10**

5. Turning Reforms into Negotiating Gains **13**

Faster moving Peers 13

Changing the Relationship with Brussels 14

6. A Vision of Statehood, a Vision for the Future **15**

The 2026 Accession Scorecard 17

Cluster 1 – Fundamentals 17

Cluster 2 – Internal Market 17

Cluster 3 – Competitiveness and Inclusive Growth 18

Cluster 4 – Green Agenda and Sustainable Connectivity 18

Cluster 5 – Resources, Agriculture and Cohesion 19

Cluster 6 – External Relations 19

Sources and methodological note 20

How to Read the Scores 20

The Cost of Standing Still

North Macedonia and the 2026 Enlargement Package

1. Brussels Prepares for a Wider Union

The European Commission's 2026 **Enlargement Package**, was published on 4 November, following its October Communication – **Preparing for a Wider Union**. The two documents address different sides of the accession process. The October communication asks how the Union should adapt its policies, budget and decision-making to admit new members. The November package examines how each of the candidate countries is preparing to join, where reforms are falling short and what the next negotiating steps would be. Together they make enlargement a practical question for the EU and its partners.

Further to the standard Enlargement Strategy and Country Reports and Factsheets, this year's annual Enlargement Package introduced indicative **Accession Roadmaps** for *Montenegro*, *Albania*, *Moldova* and *Ukraine*. *Montenegro* is in the most advanced position. At publication it had *provisionally closed 21 of 33 chapters*, drafting work on the accession treaty was underway, and the Commission saw scope to *finish negotiations by the end of 2026 and sign in 2027* if the outstanding steps were completed and member states agreed. *Albania* had opened every cluster and *provisionally closed four chapters* by the October accession conference. *Moldova* and *Ukraine* had *opened four clusters* each. The Commission considers both *ready to open the remaining clusters*. The **roadmaps set out a sequence of possible milestones**. Each formal step still depends on the applicable conditions and decisions by the member states.

At the Brussels presentation on 4 November, EU High Representative ***Kaja Kallas*** called Montenegro, Albania, Moldova and Ukraine "*the frontrunners for membership*"[1]. Enlargement Commissioner ***Marta Kos*** separately highlighted North Macedonia's high level of alignment with EU legislation, while calling for more progress on corruption and public administration and linking the next negotiating stage to the constitutional amendments[2]. *Their statements distinguish leadership in accession negotiations from the technical preparedness* and recent Reform Agenda delivery that the Commission recognises in North Macedonia.

The other six partners are at different stages. *Serbia* has open chapters but its *process has largely stalled*. *North Macedonia* formally began negotiations in 2022 and completed screening, but *has yet to open its first cluster*. *Bosnia and Herzegovina* has a European Council *decision to open negotiations* and still faces steps before substantive talks. *Kosovo* has applied and the *Commission is prepared to draw up an opinion* if the Council requests one. *Türkiye's* formally opened *negotiations remain at a standstill*, while *Georgia's* accession process is *effectively halted*.

The **roadmaps change the way the Commission communicates with the most advanced partners**. An annual report looks back and assesses delivery. A roadmap *lays out what a government and the EU can work towards over the following year*. For a country with open clusters, it gives the **sense of predictability** of the process, while creating a *basis for organising negotiations* and identifying decisions member states will need to take. For **North Macedonia**, the absence of a roadmap reflects its place in the negotiating process. Its immediate task is to create the conditions for a first opening, while the four roadmap countries can plan around later milestones.

1 https://ec.europa.eu/commission/presscorner/detail/de/speech_26_2344

2 Ibid 1

The Commission also proposes more **structured gradual integration before membership**, including in *energy*, *transport*, *digital policy* and *defence*. **North Macedonia** can continue co-operating with the EU through existing instruments. Adopting the constitutional amendments would clear the way for the next stage of accession negotiations and give the country more opportunities to work with EU institutions and member states, align its legislation with EU rules and put those rules into practice. **Where the EU ties new gradual integration measures to progress in accession negotiations, the unresolved constitutional amendments could limit North Macedonia's access to those opportunities.**

In a group of frontrunners and laggards, North Macedonia retains a substantial base of technical preparation and the Commission recognises recent delivery under the Growth Plan. However, its pace of reform and its negotiating position are weaker. The constitutional commitment is central to the next formal step. The country report also points to obstacles that the Government and Parliament can address now, particularly in democratic governance, the judiciary and the fight against corruption..

2. Exposing the Weaknesses

Full Alignment abroad, Weak Oversight at home

The most positive assessment of the Country Report for *North Macedonia* is related to its *maintained full alignment* with **EU foreign and security policy**. The country also made *good progress* in **digital transformation and research**, *adopted its Roadmap* on **Public Administration Reform** and *took legislative steps* on the **judiciary**. The Commission describes the **democratic institutions** as *generally stable* and **civil society's operating environment** as *broadly enabling*. These findings matter because they show where institutions can or have delivered. The negative findings nevertheless carry greater weight in the accession assessment. They concern the ***exercise of public power***, the ***independence of those who review it*** and the ***ability of citizens to hold institutions to account***.

The report says **Parliament** "*again failed to adopt its annual agenda*". ***Polarisation*** continued to delay reform laws and appointments, agreement remained difficult on legislation requiring qualified majorities, and use of shortened legislative procedures increased. **Cross-party agreement** on appointments including the Ombudsperson and members of the State Election Commission shows that cooperation is possible. The Commission also found that **local elections** offered genuine choice, while longstanding electoral recommendations and weaknesses in campaign oversight remained. These findings describe a **Parliament capable of reaching occasional agreements** but **struggling to organise work and deliver sustained oversight and reform**.

Prime Minister ***Hristijan Mickoski*** offered a more positive reading when EU Ambassador ***Michalis Rokas*** presented the report in Skopje on 5 November. "*We have a better report than last year*,"[3] he said. He pointed to *improved preparation in two chapters* and reiterated his *objection to conditioning EU integration on bilateral disputes*. ***DUI***, speaking from the opposition, called the report one of the *most worrying in recent years* and singled out the implementation of *Albanian language rights and equitable representation*. The reality is that the Country Report gives grounds for both a discussion of advances or gains in individual chapters and scrutiny of unresolved institutional problems. Its assessment of interethnic stability also provides context for the specific concerns raised by DUI.

3 https://vlada.mk/mk-MK/odnosi-so-javnost/pres-konferencii/mickoski-evropskata-komisija-potvrdi-nema-nazaduvanje-tuku-napredok-ovoj-izvestaj-e-podobar-od-lanskiot

The Report finds that the organisational structure for EU integration is in place, but no monitoring reports were produced on implementation of the **National Plan for the Adoption of the EU Acquis** during the reporting period. That is a *practical accountability gap*. An implementation plan should allow Parliament and the public to see *which commitments have been delivered*, *which are late* and *which institution is responsible*. Without reporting, formal commitments are harder to assess and delayed measures easier to carry forward.

There is an important distinction that the Country Report makes, the one between **executive stability** and **democratic performance**. A *stable governing coalition* gives ministries the time to design and implement reforms. On the other hand, a *well-functioning Parliament*, one able to plan its work, scrutinise draft laws and make appointments under transparent procedures determines how that stability translates into accountable government. When laws routinely move through a shortened procedure, the practical loss is time for committees, affected groups and independent experts to identify weaknesses. *A reform can pass on schedule while leaving its implementing institutions with unclear rules or unresolved disputes*. That is why **procedure belongs in the assessment of reform quality**.

Public Administration Reform illustrates the *unevenness* of the year. The Commission records *some progress*, including expanded electronic services and document management. It also flags *serious shortcomings* in the new law on top management, including selection board composition, recruitment methods and objective criteria for dismissal. The specific **flaws in the new law are a 2026 development**. The underlying problem of protecting merit in public administration is longstanding. This distinction matters when weighing whether the year's legislative activity improved the way the state operates.

New Laws, Few Results

One of the two *most consequential chapters* of the acquis, **Chapter 23** is where the Commission found *limited progress*. Within the chapter, it found *some progress* in the **functioning of the judiciary**. This is assessment is consistent. The country adopted a new **Law on the Judicial Council** that largely addresses Venice Commission recommendations, along with legislation on the **Council for Public Prosecutors**, **judicial and prosecutorial salaries**, and **civil procedure**. At the same time, the Commission establishes that there has been *no progress* in **preventing and fighting corruption**. Such assessment by the EU is justified with reports on **interference from other branches** and severe **shortages of money and staff** that continue to undermine judicial independence and financial autonomy. The **upcoming year will be a test** whether the new laws will produce change in the way appointments are made and the discipline of all stakeholders exhibited, as well as whether vacancies are filled and whether courts and prosecutors can exercise their powers independently in practice.

The Commission's assessment is blunt: "*Corruption remains prevalent and is an issue of serious concern.*"[4] **High-level corruption** remains the most serious test of enforcement. Proceedings continue to be delayed and cases often reach the statute of limitations. The **January 2026 amendments to the Criminal Code** did not adequately address the adverse effects of the 2023 amendments and *contributed to legal uncertainty*. True, the weakening of the legal framework and the poor case record are recurring problems since the 2023 amendments. However, the judgment that the January attempt to repair the framework was inadequate, and is a direct consequence from the actions of the current authorities.

The Report gives *funding figures*, which are a clear indication of the *gap between institutional obligations and resources*. According to the Commission the courts received an allocation of **0.29% of GDP in 2026**, which is **far below the 0.8% statutory prescription** and **lower than**

4 https://enlargement.ec.europa.eu/enlargement-policy/strategy-and-reports_en

the previous year allocation. The Public Prosecutor's Office received 0.24% of the state budget against a statutory 0.4%. The significance of this shortfall is practical. New **legislation can set higher standards** for case handling and appointments, while **staffing and operating budgets determine whether courts can implement them**. Financial autonomy also depends on how budgets are prepared and administered. Greater expenditure should go together with transparent budgeting and accountability for the use of resources.

These findings have *consequences outside the courtroom*. An **investigation that takes years and ends without a decision does little to deter abuse or recover criminal assets**. The appropriate **evidence of improvement** is a record of *timely investigations and prosecutions*, final *judgments* and *asset recovery*, together with *transparent procedures* and *due process*. The report gives the Government a basis to act on resources and legislation while preserving the independence of the institutions that decide individual cases.

The **Fundamentals** cluster is *at the centre of accession*. It opens first and closes last, and **progress on it determines the pace of negotiations**. Its covers public procurement, statistics, judiciary and fundamental rights, justice and security, and financial control, but also democratic institutions, public administration and economic criteria. To go along with its importance, and with the Commission's assessment, one needs to add that *no progress* is registered in 2026 in **public procurement**. This deficiency combined with the weak functionality of Parliament and the lack of judicial independence translate into lack of ability to scrutinise government. The chapter on **public procurement** offers a *second example* of how to read the assessment. The share of **single-bid tenders** was **33.9% in 2025**, and the criterion that considers **quality alongside price was applied in only 6% of procurement contracts**. The two figures measure different aspects of the system. ***A single bid limits the competition visible to the contracting authority***. Reliance on ***lowest price limits the scope to weigh quality and longer-term costs***. Together with the Commission's no-progress rating, they point to a need to look at the design and outcomes of tenders as well as the laws and procedures under which they are issued.

Media Freedom Stalls as Interethnic Relations Hold

The Commission's summary says North Macedonia *"has made no progress in this area"*[5] on **freedom of expression and media freedom**. It acknowledges steps towards alignment with the European Media Freedom Act, while identifying *persistent funding and autonomy problems at the audiovisual regulator and public broadcaster*. The report records ***40 insult and defamation lawsuits*** *involving journalists in 2025*, compared with *15 in 2024*. This is an increase in reported lawsuits involving journalists, which can include journalists as plaintiffs or defendants. Alongside threats, harassment and gaps in protections against abusive lawsuits, it warrants close scrutiny. Media independence and journalist safety were already concerns in earlier reports. The **rise in reported lawsuits adds a specific development to that established pattern**.

In **civil society**, the government's Council for Cooperation with Civil Society was reactivated and adopted a work programme. The Commission separately asks that **civil society participation in the National Council for EU Integration and the Council for Open Government Partnership be strengthened**. This distinction matters. *Restarting a formal channel for dialogue is a positive step. Effective participation also requires timely publication of proposals, access to the bodies where accession priorities are discussed, and an institutional response to submissions*. The report finds ***uneven consultation***, ***weak responsiveness*** and ***limited, unpredictable funding***, and documents ***intimidation***, ***harassment*** and ***smear campaigns***. The evidence supports a comparison of how the mechanisms function. It gives no basis for attributing motives to the government or opposition.

5 Ibid 4

The Commission describes **interethnic relations** as stable and reports continued implementation of the **Ohrid Framework Agreement**. It also records that the proposed law on adequate and fair representation remains pending following the annulment of the Balancer, with the necessary *Badinter majority* still absent. Debate over taking the ***jurisprudence examination*** in Albanian illustrates a practical question about *access and language rights*. Relations with most neighbours remained constructive, while the Commission calls for tangible results and good faith implementation of existing agreements with Bulgaria and Greece.

The relationship with the Union is already substantial in economic terms. The report records that the **EU took 76% of North Macedonia's goods exports in 2025 and supplied 47% of its goods imports**. That exposure gives regulatory alignment an immediate domestic purpose. Improving product oversight, competition and procurement can change how firms trade and how public money is spent while negotiations remain blocked. The same **report's detailed findings across these chapters show why the political and technical sides of the process need attention at the same time**.

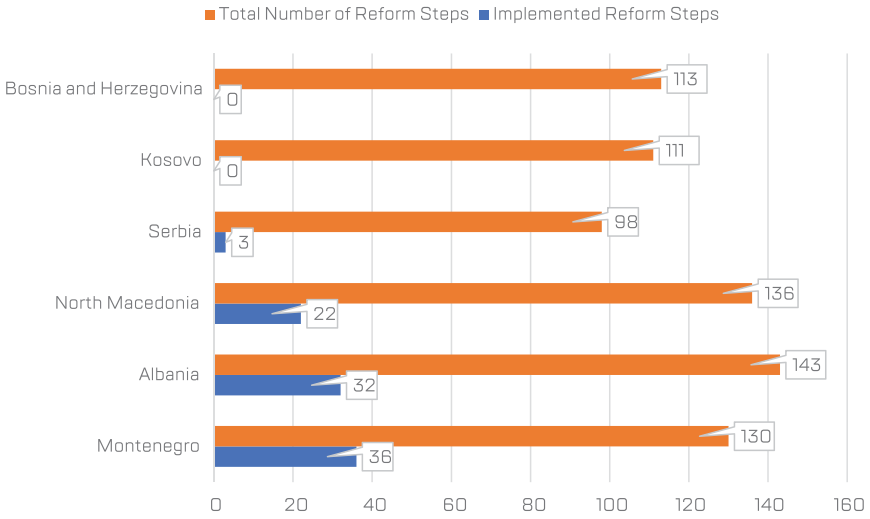
The commitment to include citizens who are part of other peoples, such as Bulgarians, in the Constitution remains a concern. That adoption would fulfil the *outstanding condition* for the *next intergovernmental conference* under the 2022 Negotiating Framework. Opening the **Fundamentals Cluster** also requires the relevant **opening benchmarks**, including work on the *Public Administration and Rule-of-Law roadmaps* and the accompanying *Action Plan on Minorities*. Completing the amendments would remove a specific procedural obstacle. It would leave the authorities with the substantive task of demonstrating implementation across the Fundamentals chapters.

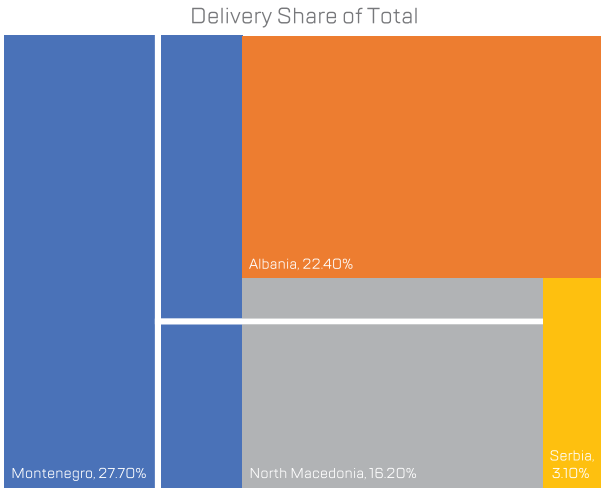
3. Will the Reforms last?

The **Growth Plan** gives Western Balkan partners opportunities to *integrate into the EU single market before membership*, *deepen regional economic ties* and *advance domestic reforms*. Its **€6 billion** Reform and Growth Facility for 2024–2027 links grants and concessional loans to agreed quantitative and qualitative steps. The Commission's description of **North Macedonia** as *one of the Facility's top performers* is welcome recognition of the focus and effort behind recent delivery. That assessment concerns performance under a specific instrument. ***Graph 1*** puts it in perspective by comparing cumulative planning and delivery across the region, while in ***Graph 2*** the share of total delivery is presented.

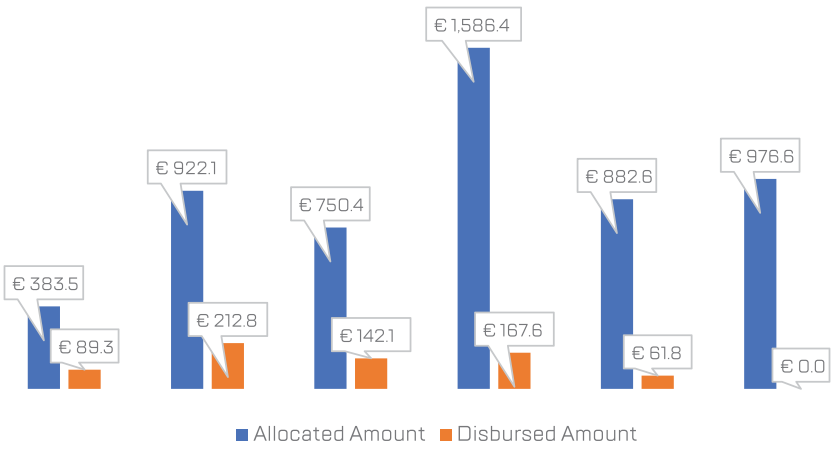
At the Skopje press conference, EU Ambassador ***Michalis Rokas*** welcomed North Macedonia's level of preparation and its alignment with EU foreign policy. He also *distinguished progress on the Reform Agenda from the broader reform record*, highlighting corruption, the judiciary and the need to strengthen institutions. That distinction puts the government's positive reading of the package in context. Meeting a verified milestone can unlock funding. **What matters for accession is whether those reforms are sustained and change how institutions exercise oversight and enforce the rules in practice.**

North Macedonia had fulfilled *22 of 136 agenda steps* in the working comparison, or *16.2%*. **Montenegro** had fulfilled *36 of 130* and **Albania** *32 of 143*. Both lead in absolute count and in

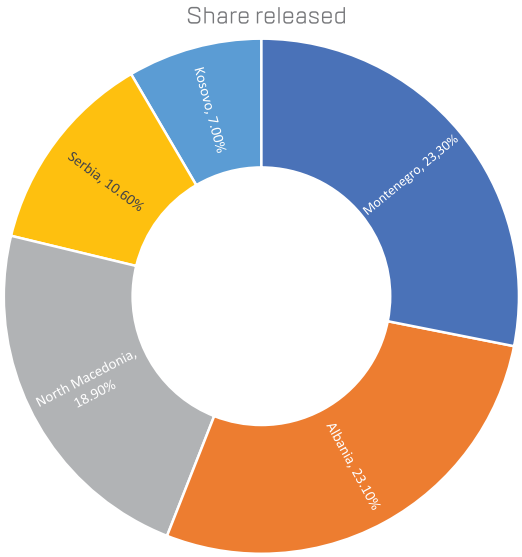




the share of all steps. The release of funds by the Commission, on 20 May 2026, gives the three countries a common comparison through the third payment round, which covered reforms reported through December 2025. **North Macedonia** had *€142.1 million* released, or *18.9%* of its €750.4 million allocation. Albania received a greater absolute amount and share. Montenegro received fewer euros, but a higher share of its smaller allocation. Serbia's larger nominal release represents a lower share of its own allocation. ***Graph 3*** puts it in perspective by comparing indicative allocation and released funding the region, while in ***Graph 4*** the share of total released funding is presented.



The Commission's decision of May this year recognised North Macedonia and its measures on school financing and digital infrastructure and equipment in schools. The indicated release of funds shows that the Commission accepted all applicable conditions. However, durable change will be visible only through consistent application of the financing rules, the distribution and use of equipment and the capacity of schools to maintain it. The same logic will apply to laws, roadmaps and institutional arrangements. Their adoption can meet a milestone, while changes in institutional practice require evidence over time. **The Facility figures show progress worth recognising, but the cumulative lead is for Montenegro and Albania.**



4. Four Reports tracing a Slowdowno

The Reform Agenda shows which commitments did the country meet. The Country Reports put those achievements in a longer-term perspective. Read together, the four reports show *where annual reform efforts have translated into greater preparedness for EU membership*, *where gains have been slow* to accumulate and *where earlier progress has been reversed*. The comparison follows two separate assessments chapter by chapter. The first is the level of preparation at the time of each report. The second is the progress recorded since the previous report. The main longitudinal comparison uses the Country Reports from 2023, 2024, 2025 and 2026, while the 2022 report provides an earlier reference for longstanding issues. ***Table 1*** place years in rows and chapters in columns, grouped by negotiating cluster to present in its first part the level of preparation, while the annual progress is given in its second part. Preparation describes the level attained over the years, while annual progress describes what changed during that reporting period. The distinction explains why a chapter can be well prepared and still register no progress in a given year.

Across the 33 rated chapters, the unweighted **preparation mean moves upwards** from ***3.03 in 2023*** to ***3.09 in 2024***, ***3.11 in 2025*** and ***3.14 in 2026***. Annual **progress fluctuates** at ***1.42 in 2023***, 1.33 in 2024, 1.42 in 2025 and 1.36 in 2026. The modest rise in preparation comes from changes in a handful of chapters. **Digital transformation and media** rises from 3.0 to 3.5 and reaches good annual progress in 2026. **Education and culture** also moves from 3.0 to 3.5 in 2026. **Free movement of capital** moves to 3.5 in 2025 and stays there in 2026. These gains are visible across the matrices. They coexist with long stretches at the same level of preparation elsewhere.

Chapter 23 stays *between some and moderate preparation* across all four reports, with annual ratings alternating *between no progress and limited progress*. In **Chapter 24**, the country remains *moderately prepared*, while annual progress moves from *some progress in 2023 and 2024 to limited in 2025 and 2026*. **Public procurement** moves from *limited progress to no progress in 2026*. Across the five rated **Fundamentals** chapters, the **annual average falls from 1.60 in 2023 to 1.00 in 2026**. These changes are more consequential for the negotiations than an increase in the all-chapter preparation mean.

The Internal Market also shows persistent gaps. The **free movement of goods** records *no progress* in three consecutive reports from 2024. **Company law** retains *good preparation* but records *no progress* in all four cycles. **Free movement of workers** remains *at an early stage*, though 2026 brings *limited progress* with adoption of the law on seasonal workers. **Environment and climate change** remains at *some level of preparation* and *limited progress* throughout the series. The overall pattern is **selective improvement within broadly stable preparation**, with a weaker annual pace in the chapters that matter most for opening and sustaining negotiations.

An annual progress score is a judgment about the reporting period. A ***sequence*** *of limited progress ratings can reflect real but* ***incremental changes***, with the preparation rating staying in the same category until the changes add up to a higher level of readiness. Equally, a *lower annual progress rating can signal that* ***reform slowed*** *without a* ***deterioration*** *in the level of preparation*. That distinction is essential for interpreting 2026. The data shows **weaker momentum in Fundamentals** and **isolated losses** of annual progress **elsewhere**, alongside improvements in areas such as digital policy. They support a finding of **uneven delivery and relative stagnation** in key fields. The Commission's explicit findings determine the language of the report.

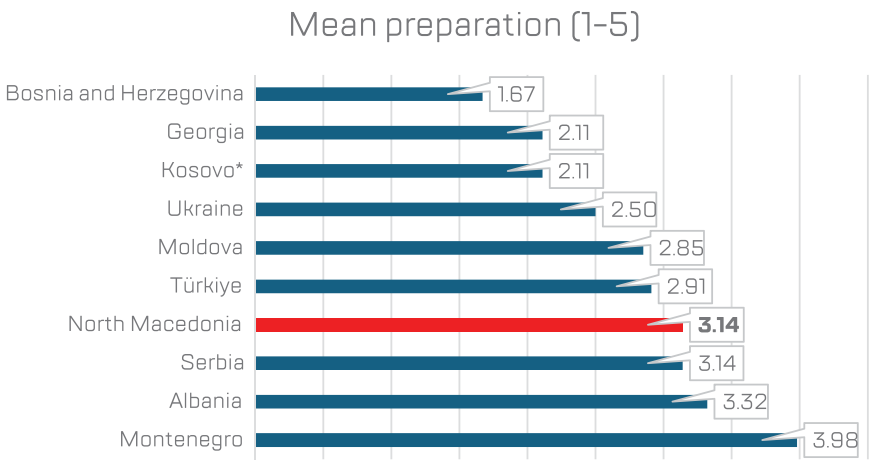
CLUSTER			LEVEL OF PREPARATION					ANNUAL PROGRESS			
	Chapter	Chapter title	2023	2024	2025	2026		2023	2024	2025	2026
Fundamentals	**23**	**Judiciary and fundamental rights**	2.5	2.5	2.5	2.5		0	1	0	1
	24	Justice, freedom and security	3	3	3	3		2	2	1	1
	5	Public procurement	3	3	3	3		1	1	1	0
	18	Statistics	3	3.5	3.5	3.5		3	2	2	2
	32	Financial control	3	3	3	3		2	1	2	1
Internal market	**1**	**Free movement of goods**	3	3	3	3		1	0	0	0
	2	Freedom of movement for workers	1	1	1	1		0	0	0	1
	3	Right of establishment and freedom to provide services	3	3	3	3		1	1	1	0
	4	Free movement of capital	3	3	3.5	3.5		3	1	3	2
	6	Company law	4	4	4	4		0	0	0	0
	7	Intellectual property law	3	3	3	3		0	0	0	1
	8	Competition policy	3	3	3	3		0	0	0	1
	9	Financial services	3	3	3	3		2	2	2	2
	28	Consumer and health protection	3	3	3	3		2	1	2	0

CLUSTER			LEVEL OF PREPARATION					ANNUAL PROGRESS			
	Chapter	Chapter title	2023	2024	2025	2026		2023	2024	2025	2026
Competitiveness and inclusive growth	**10**	**Digital transformation and media**	3	3	3	3.5		1	1	2	3
	16	Taxation	3	3	3	3		2	1	1	1
	17	Economic and monetary policy	3.5	3.5	3.5	3.5		2	2	2	2
	19	Social policy and employment	3	3	3	3		2	2	2	2
	20	Enterprise and industrial policy	3	3.5	3.5	3.5		2	2	0	2
	25	Science and research	4	4	4	4		2	2	3	3
	26	Education and culture	3	3	3	3.5		1	1	1	2
	29	Customs union	4	4	4	4		1	1	3	2
Green agenda and sustainable connectivity	**14**	**Transport policy**	3	3	3	3		1	2	2	2
	15	Energy	3	3	3	3		2	2	2	2
	21	Trans-European networks	4	4	4	4		1	1	1	1
	27	Environment and climate change	2	2	2	2		1	1	1	1
Resources, agriculture and cohesion	**11**	**Agriculture and rural development**	3	3	3	3		2	3	2	1
	12	Food safety, veterinary and phytosanitary policy	4	4	4	4		2	2	2	1
	13	Fisheries and aquaculture	3	3	3	3		2	3	2	2
	22	Regional policy and coordination of structural instruments	3	3	3	3		0	1	1	1
	33	Financial and budgetary provisions	1	1	1	1		1	1	1	1
External relations	**30**	**External relations**	3	4	4	4		2	1	2	1
	31	Foreign, security and defence policy	4	4	4	4		3	3	3	3

5. Turning Reforms into Negotiating Gains

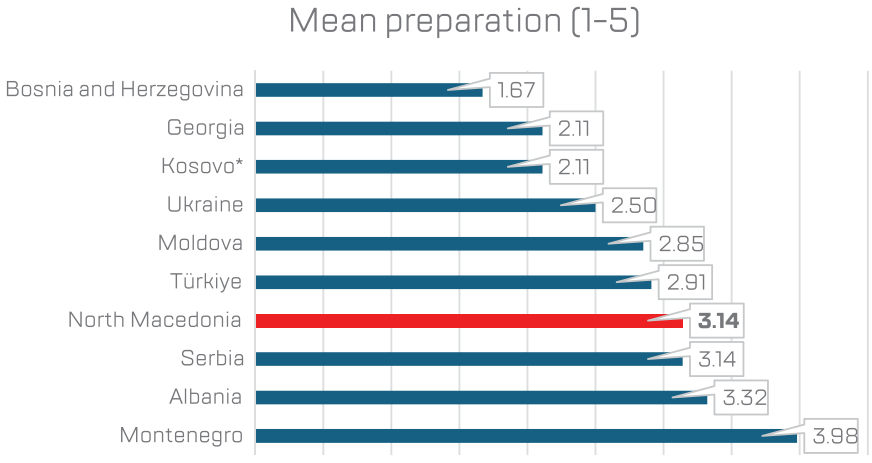
Faster moving Peers

North Macedonia averages ***3.14*** on *preparation across rated chapters*, ***levelling with Serbia*** at the precision shown and ***behind Montenegro at 3.98 and Albania at 3.32***. On *annual progress* it ranks **fifth**, at ***1.36***. ***Montenegro and Albania move faster from higher levels*** of preparation. ***Moldova and Ukraine move faster from lower levels***, overall. **All four exceed North Macedonia's annual progress average in every cluster**. Therefore, the Commission's decision to issue indicative roadmaps for those same four countries is reflective of their negotiating record, as well as their reform performance. ***Graph 5*** offers overview of the candidates and their mean assessments on the level of preparation, while ***Graph 6*** an overview on the annual progress achieved.



Albania offers the *clearest comparison*. Both countries held their *first intergovernmental conferences in July 2022*. Albania opened its *first cluster in October 2024* and *by October 2026 had opened all six and provisionally closed four chapters*. The Commission identifies the **achievement of interim rule-of-law benchmarks** as part of that advance, while urging sustained implementation and more inclusive political dialogue. *Although North Macedonia's preparation average remains comparatively close to Albania's, the distance in negotiation milestones is now considerable.* Meanwhile, **Montenegro** *is drafting an accession treaty and could reach signature in 2027* if the remaining conditions are met.

Moldova and **Ukraine** have already *moved ahead of North Macedonia in cluster openings*. *Moldova's preparation mean of 2.85 is closer to North Macedonia's than Ukraine's 2.50*. Their *annual progress means* of ***2.79*** and ***2.06***, respectively, ***exceed North Macedonia's***. The Commission identifies *legislative alignment and progress on rule-of-law benchmarks* in **Moldova**, and continued *sectoral reform and broadly effective specialised anti-corruption institutions* in **Ukraine** despite Russia's war. It also calls on Ukraine to accelerate work on its interim benchmarks. If both sustain **faster implementation**, they **can narrow the remaining preparation gap** while accumulating experience in active negotiations. The 2026 ratings establish the direction of the current comparison, with future rankings dependent on delivery by all three countries.



The contrast is particularly clear in **Fundamentals**. *Moldova's preparation average* for the five rated chapters is ***2.50***, below *North Macedonia's* ***3.00***, while its *annual progress average* of **2.80** compares far better than that of *North Macedonia* at ***1.00***. The figures describe a substantial difference in the annual ratings. What matters is that the *Commission connects Moldova's progress to work on interim benchmarks* within open negotiations. **North Macedonia has accumulated preparation**, *but its 2026 record* in judicial independence, enforcement and public procurement ***shows why that preparation is not yet translating into comparable negotiating movement***.

Serbia's tie with North Macedonia on preparation *conceals different profiles*. Its ***annual average is 0.97*** and the Commission describes serious concerns over democracy, the judiciary and fundamental rights. The **political transition gives the incoming government a chance** to reorient policy**. If it delivers** on fundamentals, foreign-policy alignment and its obligations in the EU-facilitated dialogue, **it already has open chapters through which to resume substantive work**. Faster Serbian progress is a plausible risk for North Macedonia if the latter remains at the threshold of its first cluster. ***Table 2*** presents the level of preparation and the annual progress of each of the partner countries through their mean value.

	LEVEL OF PREPARATION · 1 to 5						ANNUAL PROGRESS · -1 to 4					
Country	**C1**	**C2**	**C3**	**C4**	**C5**	**C6**	**C1**	**C2**	**C3**	**C4**	**C5**	**C6**
North Macedonia	**3.0**	**2.9**	**3.5**	**3.0**	**2.8**	**4.0**	**1.0**	**0.8**	**2.1**	**1.5**	**1.2**	**2.0**
Montenegro	4.0	4.1	4.1	3.8	3.6	4.5	2.8	3.1	3.1	3.5	3.0	3.0
Albania	3.3	3.2	3.7	3.2	2.8	4.0	2.4	2.0	2.6	2.2	2.0	3.0
Moldova	2.5	2.8	3.1	2.8	2.6	3.8	2.8	2.6	3.0	2.5	2.8	3.5
Ukraine	2.3	2.2	2.9	2.5	2.0	4.0	2.0	1.6	2.6	2.2	1.8	2.5
Serbia	2.9	3.3	3.4	3.2	2.6	3.0	1.0	1.1	0.8	1.5	1.2	-0.5
Türkiye	2.8	3.1	3.0	3.2	2.4	2.5	0.6	0.8	1.4	1.5	0.6	1.0
Kosovo*	2.0	2.4	2.2	1.8	1.8	2.0	1.2	1.0	0.9	0.5	0.8	2.0
Georgia	1.9	2.1	2.7	1.8	1.5	2.8	0.2	0.4	0.5	1.2	0.6	-0.5
Bosnia and Herzegovina	1.8	1.9	1.5	1.6	1.2	2.0	0.6	0.6	0.5	0.2	0.0	1.0

Changing the Relationship with Brussels

Bosnia and Herzegovina, **Kosovo**, **Georgia** and **Türkiye** illustrate why *chapter scores and negotiating status need to be read separately*. The Commission reports *increasing disengagement* in **Bosnia and Herzegovina** and calls for renewed reform delivery after elections. **Kosovo**'s institutional crisis *delayed reforms*, and its membership application still awaits a Council request for a Commission opinion. In **Türkiye** and **Georgia**, existing technical preparation in individual chapters coexists with a *standstill or effective halt* linked to wider political and democratic conditions. The numerical tables retain the ratings reported for these partners and leave unrated cells blank.

The *relationship with the EU also changes as negotiations advance*. An ***open cluster*** *gives* officials and institutions a regular *framework to discuss legislation, agree benchmarks*, scrutinise implementation and resolve problems in individual sectors. ***Provisionally closing chapters*** and

drafting an accession treaty **move the discussion towards the terms of membership**. **North Macedonia remains engaged** through its association arrangements, foreign policy alignment and the Growth Plan. **Its peers are adding another layer** of institutional contact through negotiation conferences and decisions on specific policy areas.

Within the Western Balkans, ***North Macedonia****,* ***Bosnia and Herzegovina*** *and* ***Kosovo*** *are the three partners* ***without substantive chapter or cluster negotiations****, although they have reached different formal stages*. **If Bosnia and Herzegovina moves into substantive talks** while North Macedonia remains blocked, **North Macedonia and Kosovo would be the only two Western Balkan partners outside that stage.** That is a conditional scenario. Albania's advance since October 2024 shows how quickly the comparison can change once a partner begins opening clusters.

The cluster results explain why ***North Macedonia's difficulty goes beyond sequencing***. Its annual Fundamentals average of 1.00 does not compare well with 2.80 for Montenegro and Moldova, 2.40 for Albania and 2.00 for Ukraine. **Its better performance in competitiveness and inclusive growth and external relations illustrates genuine strengths**. The *Commission's findings* on Parliament, judicial independence, corruption, media and public administration *identify where those strengths have yet to translate into a wider reform record*. Read together, the chapter tables and the narrative show a country with preparation to build on, but with less recent movement in the areas most likely to determine its next negotiating steps.

6. A Vision of Statehood, a Vision for the Future

North Macedonia has a level of preparation it can build on, but the four reporting cycles show how *little of that preparation has translated into sustained momentum*, particularly in the **Fundamentals Cluster**. The **Reform Agenda** shows that *institutions can deliver agreed measures*, while the Country Reports expose persistent weaknesses in judicial independence, the fight against corruption and democratic oversight. Meanwhile, other candidates are opening clusters and closing chapters. ***The longer North Macedonia stays at the same negotiating threshold, the more opportunities its peers have to work with the Union on the practical terms of integration.***

A ***Vision of Statehood*** *means taking responsibility for commitments the country has made and strengthening the institutions that serve all its citizens. A* ***Vision for the Future*** *means approaching EU membership with the self-confidence to use the accession process to carry out the reforms North Macedonia needs, affirm the Macedonian national identity and strengthen the place of the Macedonian language in Europe*. That is the case for adopting the constitutional amendments. The **Government should bring a clear text before Parliament**, *explain to citizens what it would change and* ***seek broad support*** for including citizens who are part of other peoples, including Bulgarians, in the Constitution. This is a matter of **national interest** and the highest **strategic priority**. The adoption would fulfil the outstanding condition for the next intergovernmental conference under the 2022 arrangement, and would effectively allow the country to continue its accession process.

The opening of the Fundamentals cluster also requires meeting the relevant **opening benchmarks**. Work on those benchmarks should **advance in parallel with the parliamentary process**. The ***Government*** *can publish what remains to be done on each benchmark, identify the responsible institution* and *set a timetable* for the next decision. It can resource the courts and prosecutors, fill vacancies through merit-based procedures and put the new judicial laws into practice with safeguards for independence. On corruption, it should address gaps in the Criminal Code and report on whether high-level cases reach final decisions and lead to asset recov-

ery. ***Parliament*** *should scrutinise that record and give civil society a meaningful opportunity to contribute* before laws are adopted.

The **same test of implementation applies to the Growth Plan**. The ***Government*** should *publish which measures have been verified, which are due and what evidence shows they are working in practice*. In **public procurement**, for example, it should *track the use of electronic auctions* against the agreed target and *show how institutions follow up on the Public Procurement Bureau's red flags*. By the next reporting cycle, **citizens should be able to judge what the government has delivered**, where it has fallen short and who is responsible for the next step.

The 2026 Accession Scorecard

Cluster 1 – Fundamentals

	PREPAREDNESS | 1 to 5						ANNUAL PROGRESS | -1 to 4					
Partner	**5**	**18**	**23**	**24**	**32**	**Mean**	**5**	**18**	**23**	**24**	**32**	**Mean**
Montenegro	4	4	4	4	4	**4**	2	3	3	3	3	**2.8**
Albania	3.5	3	3.5	3.5	3	**3.3**	2	2	3	3	2	**2.4**
North Macedonia	**3**	**3.5**	**2.5**	**3**	**3**	**3**	**0**	**2**	**1**	**1**	**1**	**1**
Serbia	3	4	2	2.5	3	**2.9**	0	3	0	1	1	**1**
Türkiye	3	3	1	3	4	**2.8**	0	2	-1	2	0	**0.6**
Moldova	2.5	2	2.5	3	2.5	**2.5**	3	2	3	3	3	**2.8**
Ukraine	2.5	2	2.5	2.5	2	**2.3**	2	2	2	2	2	**2**
Kosovo	2.5	2	1.5	2	2	**2**	1	2	1	2	0	**1.2**
Georgia	2	2	1.5	2	2	**1.9**	1	1	-1	0	0	**0.2**
Bosnia and Herzegovina	2	1	2	2	2	**1.8**	0	1	0	1	1	**0.6**

Cluster 2 – Internal Market

	PREPAREDNESS | 1 to 5										ANNUAL PROGRESS | -1 to 4									
Partner	**1**	**2**	**3**	**4**	**6**	**7**	**8**	**9**	**28**	**Mean**	**1**	**2**	**3**	**4**	**6**	**7**	**8**	**9**	**28**	**Mean**
Montenegro	4	3.5	4	4	4.5	5	4	4	4	**4.11**	4	3	2	2	2	4	4	4	3	**3.11**
Albania	2.5	3	3	4	4	4	2.5	4	1.5	**3.17**	0	2	2	3	3	3	1	2	2	**2**
North Macedonia	**3**	**1**	**3**	**3.5**	**4**	**3**	**3**	**3**	**3**	**2.94**	**0**	**1**	**0**	**2**	**0**	**1**	**1**	**2**	**0**	**0.78**
Serbia	3	3	3	3.5	4	4	3	3	3	**3.28**	2	1	1	1	0	1	2	1	1	**1.11**
Türkiye	4	1	1	3	5	4	2	4	4	**3.11**	2	1	0	2	0	0	0	1	1	**0.78**
Moldova	3	2.5	3	3.5	2.5	3.5	2.5	2.5	2.5	**2.83**	3	3	3	1	2	2	3	3	3	**2.56**
Ukraine	3.5	1	2	2.5	2	2	2	2.5	2.5	**2.22**	3	1	1	1	1	1	1	3	2	**1.56**
Kosovo	2.5	2	3	3	2	3	2	3	1	**2.39**	0	0	1	3	1	1	0	2	1	**1**
Georgia	2	1	3	3	2	2	1.5	2	2	**2.06**	1	0	0	1	0	1	0	1	0	**0.44**
Bosnia and Herzegovina	1	2	1	3	2	3	2	2.5	1	**1.94**	0	0	0	1	1	2	0	0	1	**0.56**

Cluster 3 – Competitiveness and Inclusive Growth

	PREPAREDNESS | 1 to 5									ANNUAL PROGRESS | -1 to 4								
Partner	**10**	**16**	**17**	**19**	**20**	**25**	**26**	**29**	**Mean**	**10**	**16**	**17**	**19**	**20**	**25**	**26**	**29**	**Mean**
Montenegro	4	4	4	4	4.5	4	4	4	**4.06**	2	3	4	3	4	3	3	3	**3.12**
Albania	4	3	4	3	4	3.5	4	4	**3.69**	3	2	3	1	3	3	3	3	**2.62**
North Macedonia	**3.5**	**3**	**3.5**	**3**	**3.5**	**4**	**3.5**	**4**	**3.5**	**3**	**1**	**2**	**2**	**2**	**3**	**2**	**2**	**2.12**
Serbia	3	3.5	3.5	3	3	4	3.5	4	**3.44**	2	1	1	0	1	0	-1	2	**0.75**
Türkiye	2	3	2	2	3	5	3	4	**3**	2	0	3	1	1	3	1	0	**1.38**
Moldova	3	2	2.5	3	3	3.5	3.5	4	**3.06**	3	3	3	3	3	3	3	3	**3**
Ukraine	4	2.5	3	1	2.5	3	3	4	**2.88**	3	3	2	2	2	3	3	3	**2.62**
Kosovo	2	2	3	2	3	1	2	3	**2.25**	0	1	1	1	1	0	1	2	**0.88**
Georgia	2	2.5	3	2	3	3	3	3	**2.69**	0	1	1	0	0	1	0	1	**0.5**
Bosnia and Herzegovina	1	2	1	2	1	2	1	2	**1.5**	0	0	1	0	1	0	0	2	**0.5**

Cluster 4 – Green Agenda and Sustainable Connectivity

	PREPAREDNESS | 1 to 5					ANNUAL PROGRESS | -1 to 4				
Partner	**14**	**15**	**21**	**27**	**Mean**	**14**	**15**	**21**	**27**	**Mean**
Montenegro	4	4	4	3	**3.75**	4	4	3	3	**3.5**
Albania	3	4	4	2	**3.25**	2	3	3	1	**2.25**
North Macedonia	**3**	**3**	**4**	**2**	**3**	**2**	**2**	**1**	**1**	**1.5**
Serbia	4	3	3.5	2.5	**3.25**	1	2	1	2	**1.5**
Türkiye	3	3	5	2	**3.25**	1	1	2	2	**1.5**
Moldova	2.5	4	2.5	2	**2.75**	2	3	2	3	**2.5**
Ukraine	2	4	2	2	**2.5**	2	3	2	2	**2.25**
Kosovo	2	2	2	1	**1.75**	1	1	0	0	**0.5**
Georgia	2	2	2	1	**1.75**	2	0	2	1	**1.25**
Bosnia and Herzegovina	2	1	2	1.5	**1.62**	0	0	1	0	**0.25**

Cluster 5 – Resources, Agriculture and Cohesion

	PREPAREDNESS | 1 to 5						ANNUAL PROGRESS | -1 to 4					
Partner	**11**	**12**	**13**	**22**	**33**	**Mean**	**11**	**12**	**13**	**22**	**33**	**Mean**
Montenegro	3.5	3.5	4	4	3	**3.6**	3	3	3	3	3	**3**
Albania	2.5	2.5	4	3	2	**2.8**	2	2	2	2	2	**2**
North Macedonia	**3**	**4**	**3**	**3**	**1**	**2.8**	**1**	**1**	**2**	**1**	**1**	**1.2**
Serbia	2	3	3	3	2	**2.6**	1	1	1	2	1	**1.2**
Türkiye	2	2	3	3	2	**2.4**	1	0	2	0	0	**0.6**
Moldova	2	3	3.5	3	1.5	**2.6**	3	3	3	3	2	**2.8**
Ukraine	2	3	2	2	1	**2**	3	2	2	1	1	**1.8**
Kosovo	2	3	1	1		**1.75**	0	0	1	2		**0.75**
Georgia	1	2	2	1.5	1	**1.5**	1	1	1	0	0	**0.6**
Bosnia and Herzegovina	1	2	1	1	1	**1.2**	0	0	0	0	0	**0**

Cluster 6 – External Relations

	PREPAREDNESS | 1 to 5			ANNUAL PROGRESS | -1 to 4		
Partner	**30**	**31**	**Mean**	**30**	**31**	**Mean**
Montenegro	4	5	**4.5**	2	4	**3**
Albania	4	4	**4**	3	3	**3**
North Macedonia	**4**	**4**	**4**	**1**	**3**	**2**
Serbia	3	3	**3**	-1	0	**-0.5**
Türkiye	3	2	**2.5**	1	1	**1**
Moldova	3.5	4	**3.75**	3	4	**3.5**
Ukraine	4	4	**4**	1	4	**2.5**
Kosovo	2	2	**2**	2		**2**
Georgia	3	2.5	**2.75**	0	-1	**-0.5**
Bosnia and Herzegovina	2	2	**2**	0	2	**1**

Sources and methodological note

[1] 2026 Communication on EU Enlargement Policy and indicative roadmaps

[2] Preparing for a Wider Union, October 2026

[3] Council accession conferences of 12 and 13 October 2026

[4] European Commission 2026 country reports and package

[5] North Macedonia country reports 2022 to 2025, in the Commission archive

[6] Council overview of North Macedonia's accession process

[7] Reform and Growth Facility rules and scoreboard

[8] Commission funding release of 20 May 2026

[9] Commission allocation figures

[10] EEAS remarks by Kaja Kallas and Marta Kos, Brussels, 4 November 2026

[11] Vlada – Press Conference PM Mickovski

How to Read the Scores

Preparedness and annual progress. The analysis uses the European Commission's 2026 country reports for the candidate comparison and its 2023–2026 reports to track change in North Macedonia. Preparedness describes the level reached at the time of assessment. Annual progress describes what changed during the reporting period. A country can make progress within a chapter while remaining at the same level of preparedness.

Coding and averages. Preparedness is coded from 1 to 5: *early stage*, *some level of preparation*, *moderately prepared*, *good level of preparation* and *well advanced*. Half-points represent intermediate preparedness assessments. Annual progress is coded from -1 to 4: *backsliding*, *no progress*, *limited progress*, *some progress*, *good progress* and *very good progress*. Each average gives equal weight to the chapters with an available rating. A dash or blank means no comparable rating was available and is excluded from the average. A zero means *no progress* and is included. These averages are calculated for this analysis from the Commission's qualitative assessments. Small differences should be interpreted alongside the country reports' findings and formal negotiating milestones.

Reform Agenda and Growth Plan. The share of verified steps uses all agreed steps as its denominator and shows cumulative delivery. Assessing whether a partner is on schedule requires comparing verified steps with those due by a common cutoff. The share of funds released uses the indicative allocation as its denominator. Releases can include pre-financing, and individual milestones can carry different financial weights, so the funding share and the share of verified steps measure different aspects of delivery.

PRESPA ИНСТИТУТ INSTITUTE
ПРЕСПА

