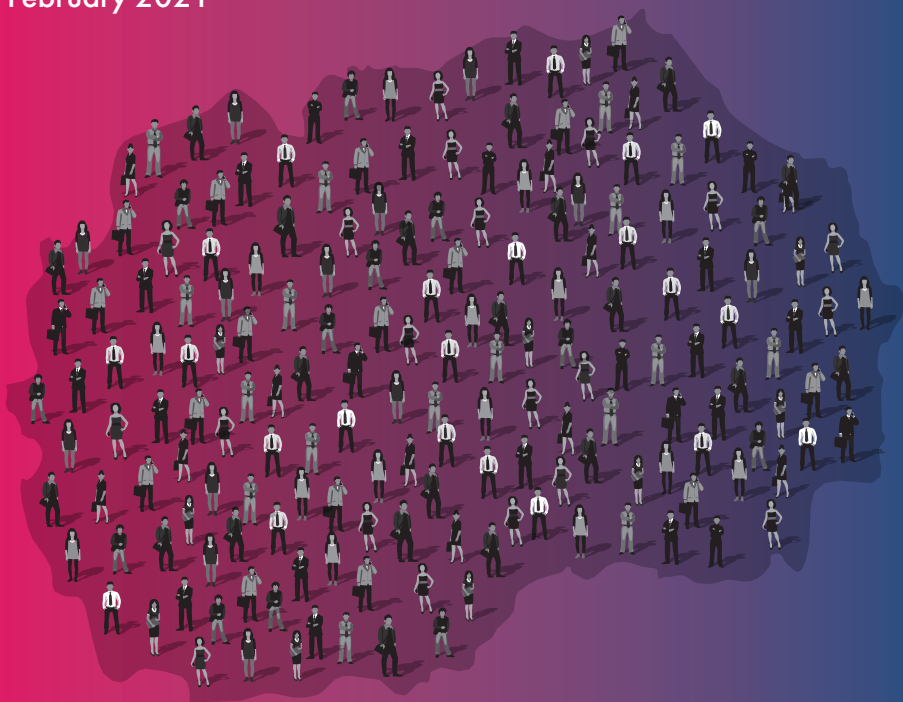


Public Opinion Analysis Paper No.01/2021

Analysis of public opinion on North Macedonia's accession to the European Union (2014-2020)

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Conclusions

- The decline of the support for EU membership, which has been a trend for many years, stopped in 2020
- In 2020, 69% of the population supports Macedonian EU membership, which is a 4% increase in comparison to the year before
- The inter-ethnic gap in the level of support for EU membership is decreasing
- The number of Eurosceptic respondents among the youngest population is on the rise
- There is a proportionate correlation between the support for EU membership and the level of educational attainment of respondents
- EU membership is significant for 70% of the population
- Virtually half of the Macedonian population believes that the country is ready for membership, which is a reflection of the lack of information in regards to the accession process
- A vast majority of the respondents have noticed progress in the EU integration process in the course of 2020
- Ethnic Macedonians are evidently more pessimistic about the progress in the accession process in the last year
- The number of respondents who believe that the non-accomplishment of domestic reforms has been the main reason why North Macedonia is not an EU member has significantly decreased
- More than half of the citizens believe that the largest hurdle in the Macedonian accession process is the obstructions of the neighboring countries of North Macedonia's EU membership aspirations
- The number of citizens who believe that North Macedonia will become an EU member in the next three to ten years is on the rise
- Such enthusiastic perceptions do not

correspond to the realistic outlook for a potential EU membership and are yet another indicator of the fact that the population is lacking information on the trajectory and the timeframe of the accession process

- Virtually half of the population believes that North Macedonia could become an EU member in the next 3 to 5 years, which is a far cry from any realistic assessment
- The rationalist-utilitarian factors continue to be the main determinants for the support of EU membership
- The aggregate percentage of respondents that support EU membership and that are incentivized by rationalist-utilitarian considerations exceeds the 50% threshold
- The security aspects of the EU integration process constitute a significant factor for the support of EU membership
- Economic development, the reduction of unemployment, the quality of life and the improvement of infrastructure are perceived as key public policy areas that would be positively affected by the EU membership
- In the last four years, the identity and value-based factors have been bolstered dramatically and have taken up a dominant position in the formation of the Eurosceptic energy in Macedonian society
- The threat of losing the national identity and the sovereignty and independence of the state as a result of the Europeanisation processes have taken the spotlight in the formation of Eurosceptic attitudes
- The number of respondents who self-identify themselves through an exclusively ethnic prism is on the rise
- The support for EU membership among SDSM supporters fully reflects the cues of the party leadership, and it exceeds the 90% threshold
- The support for EU membership among VMRO-DPMNE supporters is lower by more than 30%
- The support for EU membership among VMRO-DPMNE supporters has increased considerably
- The percentage of Eurosceptic attitudes among VMRO-DPMNE supporters is declining

- Still, more than one third of VMRO-DPMNE supporters are against EU membership
- The obvious gap between the supporters of the two largest parties in North Macedonia widens even further when we analyze the attitudes of these groups of respondents in regards to the specific aspects of the accession process
- 80% of the SDSM supporters are convinced that the country is ready for membership. On the contrary, 64% of VMRO-DPMNE supporters believe that the country is not ready for membership
- While more than 90% of SDSM supporters have detected progress in the accession process in the last year, nearly half of the VMRO-DPMNE supporters believe that there was no progress and that the country has actually regressed in the EU integration process

Introduction

The support for North Macedonia's European Union (EU) membership and its process of accession has been a subject of numerous public opinion surveys. However, most of these surveys have been conducted on an ad hoc basis and they have rarely been framed in a longitudinal and consistent methodological framework. There is an obvious lack of unified data bases that would offer repetitive public opinion research which would measure public attitudes through a generalized and coherent methodological framework across multi-year time periods. With a view to filling this gap, the Institute for Democracy "Societas Civilis" - Skopje and the Konrad Adenauer Foundation in 2014 initiated the establishment of a longitudinal database about the public support for the EU accession process and North Macedonia's EU membership

which would be effectuated through annual public opinion surveys based on a coherent methodology and measurement of identical questions. This database focuses on two dimensions of public opinion on the Macedonian EU accession process which are addressed in every annual survey, and whose measurement is obtained by utilization of identical batteries of survey questions. The first dimension seeks to determine the general trends of public support for North Macedonia's EU membership. The second goal is to establish the determinants of such support through a long-term impact analysis of three factors: rationalist-utilitarian, identity-based and cues from political elites and political parties. Such accumulation of comparable data opens the path for establishment of more serious longitudinal analyses of the support for North Macedonia's EU membership. Furthermore, as an addition to this unified design, every annual research further inspects public opinion on the EU integration process, by

examining current topics, specific for concrete time periods.

The starting point of this approach are the findings of the monograph "Public opinion and Macedonia's accession to the European Union (2004-2014)"¹, published in 2014, which at the same time includes the data from the public opinion survey conducted in 2014, and represents a methodological reference point for all subsequent research outputs. This comprehensive study accomplished two objectives. First, it determined general trends of support for North Macedonia's EU membership pointing out a correlation between the dynamics of the support for European Union membership and the development of the Macedonian EU accession process manifested in two time-intervals: 2004-2009 as a period of consistent and exceedingly high support and 2010-2014 as a period of gradual decline of support for EU membership.

Second, the study established an analytical model of the determinants of support for EU membership through the interaction of three factors of public attitude formation: rationalist-utilitarian, identity-based and cues from political parties.² The rationalist-utilitarian framework presumes the importance of calculation of material benefits as the main factor for the formation of individuals' attitudes for support of the European integration process. In this context, support can be based on current or future perceptions on personal or societal benefit from the accession to the European Union. On the other hand, support for the European integration process may also be the result of the influence of identity and value-based factors shaping the individual's world view, which consequently is the basis of the individual's attitude formation. Thereby, the degree of national self-identification and the sense of cultural threat are

¹ Damjanovski, Ivan. "Public opinion and Macedonia's accession to the European Union (2004-2014)", Konrad Adenauer Foundation / Institute for Democracy "Societas Civilis" – Skopje, 2014

² For a wider theoretical explication of the model, cf. *ibid*, pages 13-24

manifested as the primary factors for variation in attitudes. Finally, the formation of public attitudes towards European Union membership can also be a result of the influence of cues from political parties which are capable of imposing their own attitudes regarding important social issues to their supporters. Thus, it is presumed that the variation of support for the European integration process depends on the homogeneity of the attitudes of the political parties about this question.

About the survey

This public opinion analysis on the Macedonian process of accession to the European Union conducted in 2020 is a continuation of the research done in 2014, 2016, 2017, 2018 and 2019. It applies the same theoretical and analytical model of the determinants of support for North Macedonia's EU membership, and at the same time it compares its empirical findings with the findings of the previous surveys.

The primary data used in this analysis come from a public opinion survey research conducted in November 2020 on a sample of 1006 respondents. The sample is nationally representative according to gender, age (over 18 years of age), ethnicity, and it also covers respondents from all six electoral districts in the country. Results are presented in percentage and are subject to a statistical error of $\pm 3\%$.

This research uses the same methodology and questionnaire as the surveys conducted in the years of 2014, 2016, 2017, 2018 and 2019. This approach creates conditions for a mini longitudinal analysis of the support for North Macedonia's accession to the European Union over the past five years. Thus, in line with the previously established analytical model, this study focuses on analysing general trends and basic determinants of support for North Macedonia's membership in the European Union in the period 2014-2020.

General Trends

The longitudinal analysis of the trends regarding the support of the membership of North Macedonia into the EU indicates a gradual decline, which is mainly correlated with the credibility of the Macedonian accession process. The last two years have been marked by unexpected swings of this credibility. On the one hand, the perspectives for progress in the accession process received a major boost with the ratification of the Prespa Agreement in 2019, which removed the multi-year blockade which was caused by the name dispute with Greece. On the other hand, the decisions of the European Council in October 2019 temporarily blocked the enlargement process, which resulted in a new, serious challenge for the credibility of the accession process. However, the dynamics of the EU enlargement policy in the first half of 2020 heralded a significant bolstering of the credibility of the accession process. After the European Council adopted the “New Methodology” on EU enlargement in March and decided to open the accession

negotiations with North Macedonia³, it seemed that the Macedonian perspectives for EU membership are getting back on track. However, as early as November, in the period in which this year’s public opinion survey was conducted, rumors started circulating that Bulgaria might obstruct the negotiating framework for North Macedonia. Eventually, this hypothetical outcome became a reality in December 2020, when the European Council did not adopt the negotiating framework as a result of Bulgarian opposition.

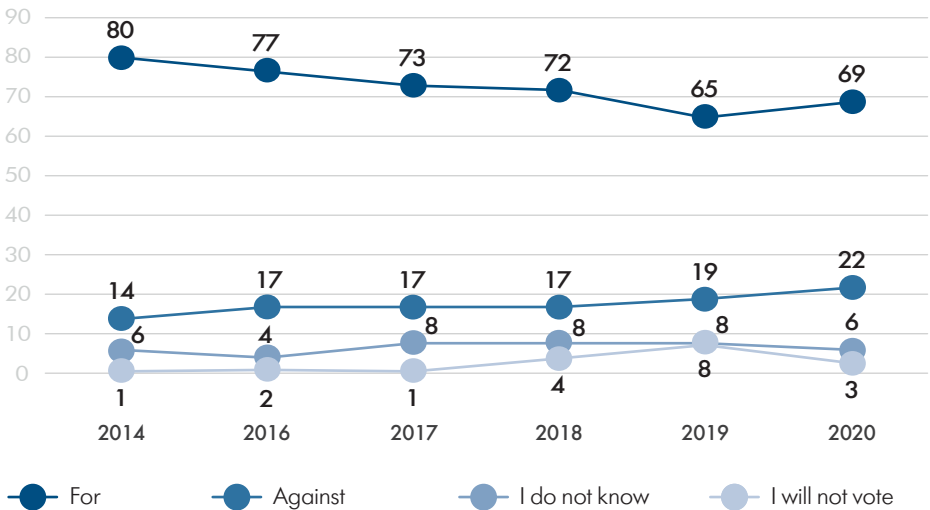
Thus, the degree of support for North Macedonia’s EU membership is highly likely a reflection of the way these factors influenced the respondents’ attitudes. It is evident that the decline of the support for EU membership, which has been a trend for many years, was finally stopped in 2020. In 2020, 69% of the population supports Macedonian EU membership, which is in fact a 4% increase in comparison to the year before (graph 1). However, despite the seemingly significant growth of membership support, it is still

³ Council of EU, Council Conclusions on Enlargement and Stabilisation and Association Process, 7002/20, Brussels, 25 March 2020.

below the levels recorded in the period between 2014 and 2018. In parallel to these developments, a corresponding increase of 3% of the Eurosceptic attitudes, which now represent 22% of the population, is also evident. From a demographic point of view, there is an evident reduction of the interethnic gap in terms of the degree of support for EU membership, which is a result of divergent dynamics of the attitudes of both largest ethnic

communities in the Macedonian society. Thus, in 2020, 66% of ethnic Macedonians support EU membership, which is a 6% increase in comparison to 2019. On the other hand, a reverse process is evident among the ethnic Albanians, where there is 76% support, which is 7% less than last year. At the same time, the number of Eurosceptic respondents among the youngest population (aged 18-29) is also on the rise; namely, nearly one third of

Graph 1.⁴ If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



⁴ As the decimal numbers were rounded off, the total may not be 100% (this remark applies to all graphs and tables).

those respondents do not support North Macedonia's membership in the EU. On the other hand, there is a proportionate correlation between the support for EU membership and the level of educational attainment of respondents.

The distribution of attitudes regarding the importance of EU membership in 2020 is virtually identical to the distribution in 2019. The significant reduction of the number of people who find EU membership to be highly important, in comparison to 2018, has been confirmed this year as well. Still, EU

membership plays a significant role for 70% of the population (table 1). Despite the reduction of the interethnic gap at a generic level, the large disparity between the ethnic Macedonians and ethnic Albanians in terms of the respondents who do not believe the EU membership to be important at all, which was detected last year, still exists in 2020. Thus, 20% of ethnic Macedonians believe EU membership to have no significance at all, while this view is shared by 7% of ethnic Albanians

A notable change in the trends can

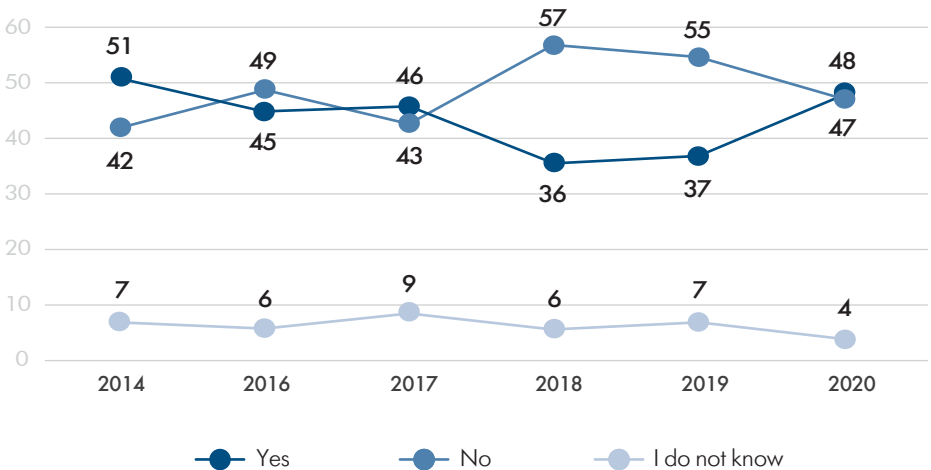
Table 1.

How personally important is it for you for North Macedonia to become a member of the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %
Highly important	48	48	54	56	36	36
Somewhat important	36	29	20	24	35	34
Somewhat unimportant	5	5	6	5	10	13
Not important at all	10	16	18	14	18	16
I do not know	1	1	1,5	1	1	1
No answer / refuses to answer	0	0	0	0	0	0

be seen in the perceptions about how well North Macedonia is prepared for EU membership. Nearly half of the Macedonian population believes that the country is ready for membership, which is an increase of more than 10% in comparison to the two previous years (graph 2). This distribution is logically coupled with a similar decline of the number of people who believe that the country is not ready to become an EU member. Such change in the perceptions about the readiness for membership

is likely a consequence of the positive image for the Macedonian accession process that was being created in the course of 2020. Still, such a distribution of attitudes is also a sign of a decrease in objectivity when assessing the Macedonian accession process, which in turn correlates with the fact that the population lacks information about the nature of the accession process and the degree of compliance of the Macedonian reform process with EU conditionality.

Graph 2.⁵ Do you believe that North Macedonia is ready for EU membership?



⁵ The graph excludes the values for the respondents who refuse to answer the question. In all cases, these values are equal to or less than 1%

A similar increase in the positive perceptions about the Macedonian accession process has also been evident in the distribution of attitudes that relate to the progress of North Macedonia in the process of European integration in the course of the previous year. The greatest change can be seen among the population that has determined that there is relative progress in the European integration process. So, in 2020 this figure (38%) is higher by 11% in comparison

to 2019 (table 2). There is also a 4% increase among the respondents who have detected minimal progress. In line with such tendencies, a significant drop of 13% can be detected among respondents who believe that there was no progress at all last year. The cleavage between the two largest ethnic communities, which has been evident in the last few years, also exists in 2020. This gap is especially evident in the distribution of attitudes when it comes to the claim that the country has

Table 2.

Regarding the previous year, how much has North Macedonia progressed in the EU integration process?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %
It has progressed a lot	14	11	13	13	11	10
It has somewhat progressed	33	28	31	25	27	38
It has progressed a little	20	20	20	28	23	27
There was no progress at all	26	30	27	30	33	20
It has regressed	5	7	2	2	5	5
I do not know	2	3	7	2	1	1
No answer / refuses to answer	0	1	1	1	0	0

not progressed at all in the European integration process in the past year. Thus, greater pessimism is noticeable among ethnic Macedonians, since 25% of this demographic group believes that, in comparison to the previous year, North Macedonia has not made any progress in terms of EU accession. This percentage among ethnic Albanians is considerably lower, i.e., 8%.

The analysis of perceptions of the main reasons that prevent North Macedonia from becoming an EU member points to a high degree of responsiveness of the Macedonian public opinion towards the current dynamic of the accession process and the enlargement policy of the EU. Thus, in comparison to the previous years, considerable deviations are perceptible in the distribution of attitudes in 2020 on a number of variables. The upward trend of perceptions focused on the non-implementation of domestic reforms as a primary hindrance for North

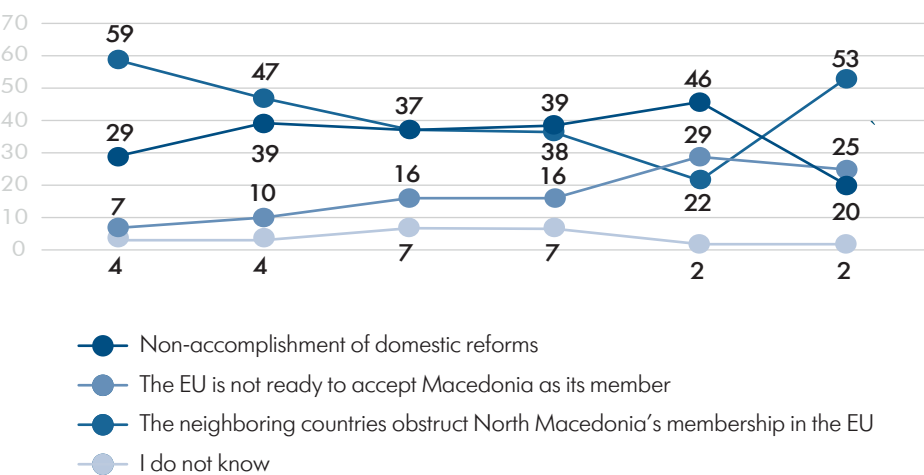
Macedonia's EU membership took a significant turn in 2020 with a declination of over 25 percentage points (graph 3). On the other hand, more than half of the citizens believe that the largest hurdle in the Macedonian accession process are the obstructions of the neighboring countries vis a vis North Macedonia's membership aspirations, which is 20 percent more compared to the previous year. Such change in attitudes is logical, and it is obviously related to the dynamic of the bilateral relations with the neighboring countries which are EU members. Thus, the lower percentage of distribution of attitudes within the framework of this variable in 2019 is very likely a result of the resolution of the dispute with Greece, which actually removed the long-standing deadlock of the Macedonian EU accession process. The considerable increase in the frequency of the perceptions on this issue in 2020 is most certainly a result of the new dispute with Bulgaria and its decision to halt the membership

negotiations towards the end of the year.

Finally, the optimistic spirit that permeates the above mentioned variables is also evident in the perceptions regarding the timeframe for EU membership. There is an upwards trend (table 3) among the population

that believes that North Macedonia will become an EU member in the next three years (a 6% growth); in the next 5 years (an 8% growth); and in the next 10 years (a 4% growth). Inversely, the percentage of respondents who believe that North Macedonia will become an EU member in the next 20 years is declining. The

Graph 3.6 In your opinion, what is the most important reason why North Macedonia is still not a member of the EU?



⁶ The graph excludes the values for the respondents who refuse to answer the question. In all cases these values are equal to or less than 2%

most significant change is detected in the group of respondents who believe North Macedonia would never become an EU member. In 2020, only 15% are pessimistic about the chances of EU membership, which is 9% less than in 2019, and is at the same time the lowest value in percentage points from a longitudinal perspective of the last 7 years. However, such positivistic perceptions do not correspond to the

realistic outlook for a potential EU membership and are yet another indicator of the fact that the people are lacking information on the trajectory and the timeframe of the accession process. Thus, virtually half of the population believes that North Macedonia could become an EU member in the next 3 to 5 years, which is a far cry from any realistic assessment.

Table 3.

When do you think North Macedonia will become a member of the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %
In the next 3 years	14	18	27	23	14	20
In the next 5 years	18	22	22	25	20	28
In the next 10 years	21	18	12	17	21	25
In the next 20 years	12	7	7	14	16	9
Never	23	25	20	17	24	15
I do not know / refuses to answer	11	10	11	5	4	3

DETERMINANTS OF SUPPORT FOR THE EUROPEAN INTEGRATION PROCESS

Rationalist-utilitarian factors

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The rationalist-utilitarian factors appear to be the key long-term determinants of the support for the European integration process in North Macedonia. The sociotropic economic calculations in regard to the anticipated future benefits of EU membership have been the foundation for the attitudes for support of EU membership since the initial public opinion surveys on the Macedonian EU membership perspectives.

This line of argumentation has also been confirmed with the results of the 2020 public opinion survey. Thus, the distribution of attitudes is virtually identical to the 2019 data. In both years, the aggregate percentage

of respondents that support EU membership and that are incentivized by rationalist-utilitarian considerations exceeds the 50% threshold (table 4). The improvement of the living standards, the reduction of unemployment and the easier access to working abroad continue to be among the main factors for the support of the Macedonian EU membership. However, in the last two years, the non-material factors that influence the support for membership have also been on the rise. In comparison to the period between 2014 and 2018, the growth of the number of people that link membership support to “belonging to the European family of states” is also confirmed in 2020. On

the other hand, the security aspects of the European integration process appear to be a significant factor, as they are supported by nearly 20% of the population.

In the last two years, there is almost no change in the distribution of attitudes in terms of the perceptions about the areas of societal life on which the EU

membership would have the most positive influence. The long-standing trend of the influence of the rationalist-utilitarian determinants is confirmed here as well, since factors such as economic development, reduction of unemployment, quality of life and improvement of infrastructure dominate the distribution of attitudes (table 5). A much smaller

Table 4.

What is your reason for deciding to vote for membership in the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %
Improvement of the standard of living	29	46	51	36	22	21
Reduction of unemployment	26	17	23	22	18	19
Improvement of democracy	10	5	7	9	13	13
Mobility of workers/ easier access to jobs abroad	3	10	5	6	15	16
A sense of belonging to "the European family of countries"	2	5	2	4	13	13
Improved security and stability of the country	27	16	12	23	19	19
I do not know / refuses to answer	2	1	1	1	0	0

share of the population gives primacy to the political and value-based benefits of EU membership, and in that respect only 11% of the respondents believe that the EU membership would have the most positive influence on human rights and freedoms in the country. An even smaller percentage (5%) of respondents relate EU membership with strengthening of the national identity.

Table 5.

Which area will be most positively affected by North Macedonia's membership in the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %
Economic development	23	25	25	20	18	19
Stability	13	15	15	13	14	12
Reduction of unemployment	23	18	21	19	20	21
Human rights and freedoms	12	9	12	14	12	11
Improvement of infrastructure	6	5	5	9	11	13
Quality of life as a whole	16	18	11	13	17	16
Strengthening of national identity	3	4	4	7	3	5
Other	1	3	2	1	2	2
I do not know	3	3	6	3	3	1

Identity and value-based factors

While the economic expectations appear to be the most important determinants for the support of EU membership, when it comes to the period after 2016, the longitudinal analysis of the attitudes against EU membership points to a rapid growth and dominance of the identity and

value-based factors in determining the Eurosceptic energy in the Macedonian society⁷. Thus, the threat of losing the national identity as a consequence of the Europeanisation processes appears to be the key Eurosceptic determinant (23%) (table 6). The loss of sovereignty and independence of the country is perceived with similar intensity; the same also goes for the perception of the change of the constitutional name, which still resonates as a significant factor of dissatisfaction with the EU accession process.

Table 6.

What is the reason for your vote against EU membership?	2019 %	2020 %
Deterioration of the standard of living	12	9
Threats to the Macedonian economy	7	9
Change of the constitutional name of the country	21	20
Loss of national identity	17	23
We will become dependent on Brussels	10	9
Loss of sovereignty and independence of the country	17	19
EU does not want us	16	11
I do not know / refuses to answer	0	0

⁷ For more information on the shift in the trends of influence of identity and value-based factors on the Eurosceptic attitudes, cf. Damjanovski, Ivan and Kirchner, Marie Jelenka. *Analysis of Public Opinion on Macedonia's Accession to the European Union (2014-2018)*. Konrad Adenauer Foundation / Institute for Democracy 'Societas Civilis' - Skopje, 2019

The increased influence of the identity-based factors is also evident in the identity self-perception of Macedonian citizens. In 2020 there is a significant rise of more than 10% in the category of respondents who identify exclusively through the prism of ethnicity (table 7). Thus, nearly 80% of the population is perceiving itself through the lens of exclusive ethno-national identification. Consequently, the rise in number of this category of respondents is matched with a nearly identical decrease of the population that has declared non-exclusive, double identity (ethnic and European). Thus, at the moment, merely 14% of the respondents have declared this type of self-identification. Only a handful of citizens declare themselves to be first and foremost Europeans, and then

members of a certain ethnic group, which is also true of the citizens who self-identify as Europeans exclusively

On the other hand, the exclusive ethno-national identity is not incompatible with supporting EU membership. In comparison to the previous year, the percentage of respondents in 2020 who declared exclusive ethno-national identity and at the same time support EU membership has increased by 9%, and currently it is at 66%. As expected, the support for EU membership among the population that perceives itself through the prism of double identity (ethnic and European) is exceptionally high and it exceeds the 80% threshold.

Table 7.

Above all, do you feel as	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %
Only Macedonian/ Albanian/other	69	70	77	69	67	78
Macedonian/ Albanian/other and European	20	20	15	20	24	14
Macedonian/ Albanian/other and European	6	7	3	4	7	7
Only European	3	3	3	5	1	1
I do not know	2	1	2	1	1	0

Cues from political parties

The longitudinal analysis of the public opinion on the Macedonian EU accession process has detected a high correlation between the support for EU membership and cues from political parties. The basic assumption of this theoretical model, is that the respondents that support certain political parties shape their attitudes about the European integration process under the influence of the official standpoints and positions (on the same process) of the political parties they support.

In this context, in 2020, SDSM invested a lot of energy in narratives for support of the accession process and in pushing it to the top of the list of party priorities. In line with the strengthening of the perspectives for progress in the accession process in the first half of 2020, SDSM, as a ruling party that oversees the government's European integration agenda, invested

considerable resources in propagating the importance of the EU accession process for the prosperity of the country. On the other hand, the main opposition party VMRO-DPMNE, throughout the year, maintained more restrained positions on the dynamics and the expectations from this process. These attitudes towards the accession process also has a bearing on the extent to which the supporters of these parties back the European integration process. So, like in the previous years, the support for EU membership among the SDSM supporters is mirroring the commitments of the party leadership, to the extent that this support is extremely high and exceeds the 90% threshold (graph 4). As expected, the support for EU membership among VMRO-DPMNE supporters is lower by more than 30%. Nevertheless, it is evident

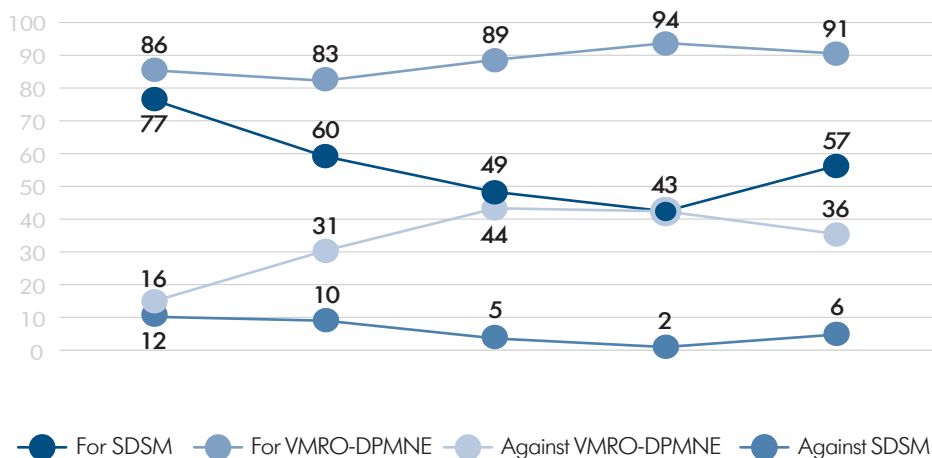
that the support for EU membership among the VMRO-DPMNE supporters has made a considerable increase of 14% in comparison to the all-time lowest values for this demographic category in 2019. Thus, in 2020, once again a majority of VMRO-DPMNE supporters that supports the Macedonian EU membership has been constituted. Simultaneously with this process, we can also detect a decrease in the Eurosceptic energy within this demographic group. Still, more than one third of the supporters of this party are against EU membership.

However, the obvious gap between the supporters of the two largest parties in North Macedonia widens even further when we analyze the standpoints of these groups of respondents in regard to the specific aspects of the accession process that were presented above in this text. For instance, in terms of the perceptions about the readiness of North Macedonia to become a member of the EU, a staggering 80% of the SDSM supporters are convinced that the country is ready for membership. The distribution of attitudes

on this issue is diametrically opposite among VMRO-DPMNE supporters, 64% of which believe that the country is not prepared for membership. There has been a similar disparity in the frequency of perceptions in regard to the country's progress in the European integration process in the course of last year. While more than 90% of SDSM supporters have detected progress in the accession process in the last year, nearly half of the VMRO-DPMNE supporters believe that there was no progress, and that the country has actually regressed in the EU integration process.

Graph 4.⁸

If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



⁸ The values that are below 10%, a refer to the answers I do not know and I will not vote have not been included in the graph

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Freedom, justice, and solidarity are the basic principles underlying the work of the Konrad Adenauer-Stiftung (KAS).

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IDSCS is a think-tank organisation researching the development of good governance, rule of law and North Macedonia's European integration. IDSCS has the mission to support citizens' involvement in the decision-making process and strengthen the participatory political culture. By strengthening liberal values, IDSCS contributes towards coexistence of diversities.

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