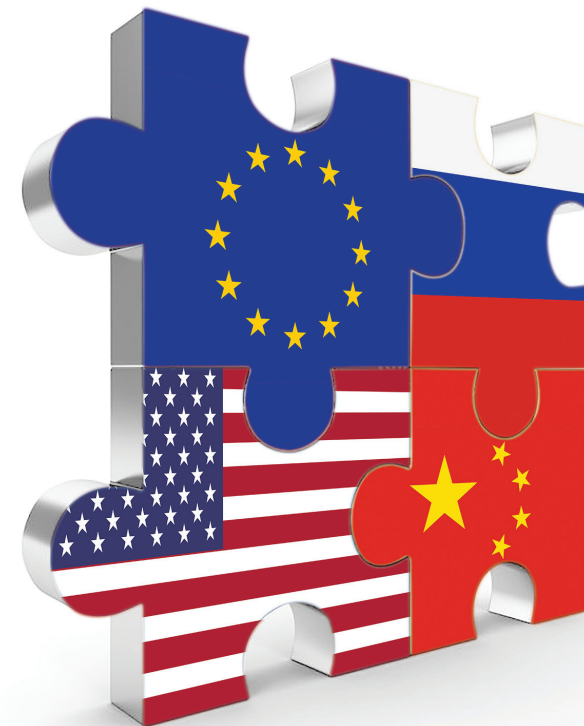




**THE EUROPEAN UNION
ON THE VERGE OF BOUNCING
BACK IN MACEDONIA**

*Zoran Nechev and Nenad Markovikj
with a contribution by Ivan Nikolovski*

March 2018



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IMPRESSUM

Title: The European Union on the verge of bouncing back in Macedonia

Publisher: Konrad Adenauer Foundation in the Republic of Macedonia
Institute for Democracy "Societas Civilis" – Skopje

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Translation: Jana Ilievska

Design: Vladimir Barlakoski

This publication is available at:
<http://www.kas.de/mazedonien/mk>
<http://www.idscs.org.mk>

THE EUROPEAN UNION ON THE VERGE OF BOUNCING BACK IN MACEDONIA

*Zoran Nechev and Nenad Markovikj
with a contribution by Ivan Nikolovski*

Findings

- The highest proportion of respondents (41.8%) reason that the European Union (EU) is Macedonia's greatest ally, followed by the US (16.6%) and Russia (13.8%).
- This perception remains unchanged across ethnic lines; however, a large gap can be observed between ethnic Albanians (61.5%) and ethnic Macedonians (36.4%) in terms of the perception that the EU is the country's greatest ally.
- Controlled for political party affiliation, the supporters of all parties place the EU as the greatest ally of Macedonia. VMRO-DPMNE supporters perceive Russia as the country's second greatest ally (23.4%), whereas this percentage is also considerable in the supporters' base of Levica (16.7%) and SDSM (9.2%).
- The majority of respondents (40.8%) perceive the US as a foreign factor with the greatest influence in the country (40.8%), placing the EU on second (38.1%) and Russia on third place (3.7%).
- Controlled for ethnicity, Macedonians (43.5%) perceive the US as the most influential foreign factor in Macedonia, while ethnic Albanians (53.4%) believe that the EU takes the leading position.
- The EU is seen as the country's biggest donor by the majority of the respondents (42.8%), followed by the US (16.6%) and Turkey (8.2%). However, the majority of respondents are not informed at all about the amount of money provided by

the biggest donor (69%). Out of the total percentage of informed respondents, the majority (8.1%) think that the EU provides the country with more than 200.000.000 EUR per annum.

- Almost two-thirds of the respondents believe that EU membership will considerably or to a great extent contribute to strengthening and implementing various segments of rule of law. The most positive perceptions are of the improvement of court decisions implementation (58.2%).
- Ethnic Albanian respondents display greater confidence that EU accession will have a positive impact on the rule of law in the country.
- Controlled for party affiliation, SDSM supporters are by far the most optimistic about EU's role in strengthening the rule of law in the country, followed by DUI and BESA supporters, while VMRO-DPMNE appear to be the most reserved respondents.
- The perception of the EU as a promoter of rule of law in Macedonia has firm grounds in the public eye. Respondents, in all related categories in this area, cumulatively give more positive than negative answers, which indicates a positive perception of the EU as a promoter of rule of law in the country and acknowledges its constructive impact.
- Speaking of confidence in the Government delivering on rule of law issues reveals a visible skepticism in public perceptions. Namely, in eight out of nine examined categories, the cumulative valid percentage of negative answers visibly outweighs the cumulative valid percentage of positive answers.
- The most influential factor in the perceptions of confidence in the Government delivering on rule of law issues is political affiliation, while ethnicity and education levels play a minor role.

Conclusions

- The perception of the EU as an influential foreign factor has significantly increased compared to last year's survey (38.1% compared to 28.1%), whereas the perception of Russian influence has decreased meaningfully from (6.2%) to (3.7%). These data could be interpreted as a positive assessment by the citizens of the role the EU played in resolving the crisis in Macedonia.
- The greater involvement of the EU in domestic political affairs (post-political crisis reforms) appears to have increased the Union's credibility and visibility among Macedonian citizens. This has resulted in a significant drop in popular support for Russia as an ally (from 25% to 13.8%).
- The majority of respondents perceive the EU as Macedonia's biggest donor; however, they fall short on recognizing the amount of money invested, which surfaces the issue of EU visibility in this particular segment and strategic communication.
- With respect to EU's role in strengthening rule of law in Macedonia, the overwhelming majority of respondents have positive answers. This perception was measured through seven different rule of law categories, as follows: independence of the judiciary; public prosecutor conducts fair investigations; public authorities act on the basis of, and in accordance with standing law; stability and consistency of legislation; prevention of abuse (misuse) of powers by public authorities; guaranteed equality before the law; judgments effectively and promptly executed.
- Having in mind the fact that in 2017, almost 70% of the respondents gave the answer that the EU accession process will contribute or somewhat contribute to the rule of law in the country, one could conclude that this positive trend has stabilized in the country. Namely, data from the present survey indicate that the EU is permanently perceived as having a positive role in promoting the rule of law.

- The long-lasting political crisis in the country has made public perceptions in the country highly skeptical and cynical in expressing confidence in the Government to deliver on rule of law issues. There is a widespread mistrust in the domestic institutional system which is a result of the widespread negativity not just towards the capacity of the Government to deliver on rule of law issues, but also the widespread negativity towards the judiciary, the media, secret services, as well as other institutions of the system.
- Public perceptions of political issues, such as confidence in the Government to deliver on rule of law issues, are highly opportunistic and dictated by political orientation. This indicates “strategic positioning” of public perceptions based on whether the party one votes for is in power or not.

Introduction

The 2016 Global Strategy for the European Union’s Foreign and Security Policy (EUGS) outlined the interest of European citizens while making a correlation between its internal and external security. While indicating that they are ‘ever more intertwined’, the Strategy states that ‘our [EU] security at home depends on peace beyond our borders’. In regards to the Western Balkans region, the EUGS voices that ‘credible enlargement policy represents a strategic investment in Europe’s security and prosperity’.

Maintaining a credible enlargement perspective for the Western Balkans was also emphasized in the European Commission President Juncker’s 2017 State of the Union

address.¹ In line with this, in February 2018, the Commission issued a Communication entitled 'A credible enlargement perspective for and enhanced EU engagement with the Western Balkans'², that confirms the European future of the region as a geostrategic investment in a stable, strong and united Europe based on common values.

All the countries in the region are fragile in a different way and prolonging the process of accession could be detrimental to the stability of the region, and thus, stability of Europe. Even more, other international actors are increasing their presence and influence in the region that is sometimes even used to stray the countries from their European path. These actors are filling the void left by the EU as a result of its decreased engagement with the region.

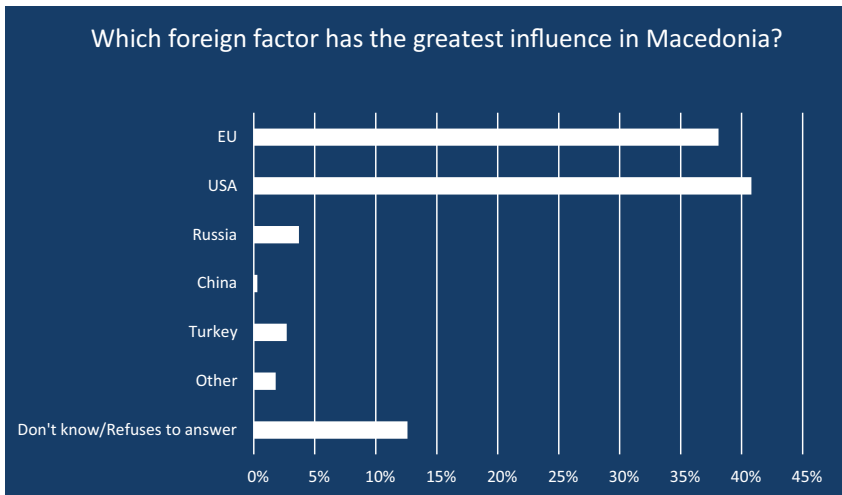
The case of Macedonia is a primer for EU's credibility in the region. When the EU finally decided to engage, it helped the country recover after 'approaching the edge of a cliff'³ and dismantle different (unlikely for the majority of citizens) scenarios for the future of the country that were floating in the air. This new momentum and energy is recognised and appreciated by the citizens, as reveals the IDSCS telephone survey conducted during December 2017, sampling

1 See http://europa.eu/rapid/press-release_SPEECH-17-3165_en.htm

2 See https://ec.europa.eu/commission/sites/beta-political/files/communication-credible-enlargement-perspective-western-balkans_en.pdf

3 Refer to Andrew Rettman "Nato prepares to take in Macedonia" at <https://euobserver.com/enlargement/140616>

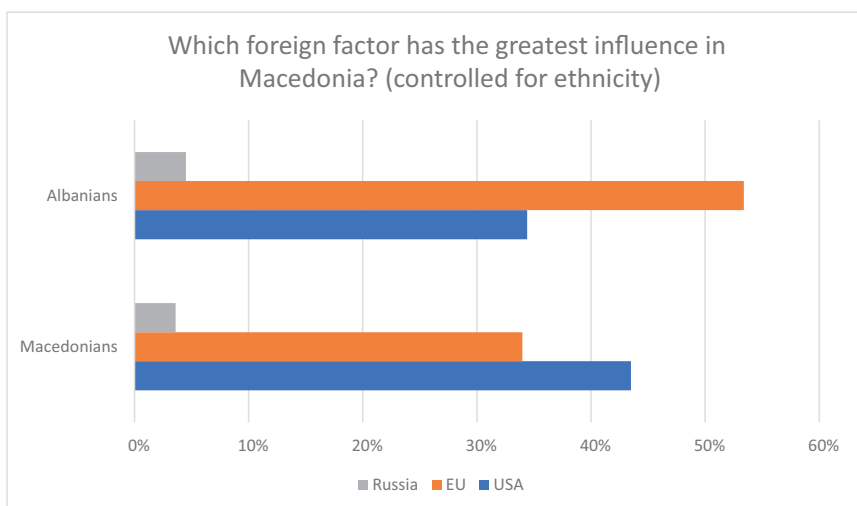
1100 respondents.⁴ The greater involvement of the EU in domestic political affairs (and post-crisis reforms) appears to have increased the Union's credibility and visibility among Macedonian citizens. This also has resulted in a drop in the perception of Russian influence. While in 2016,⁵ 21.8% of the respondents perceived the EU as the most influential foreign factor, one year later, 38.1% of the respondents had that perception. On the other hand, whereas 6.2% of the respondents perceived Russia as the most influential foreign factor in 2016, only 3.7% of the respondents had that perception in 2017.



4 The sample is representative by gender, age (above 18 years) and ethnicity, and it also has a representative coverage of respondents from all six electoral units in the country. The results are presented in percentages and are subject to an error of $\pm 3\%$.

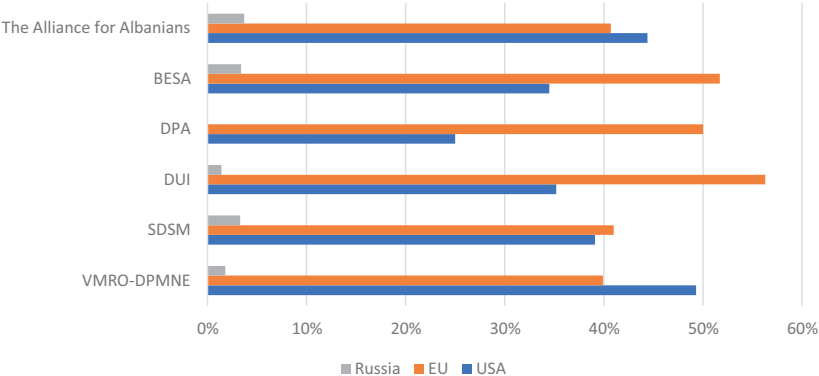
5 Refer to Zoran Nechev and Hristijan Petrusevski. "The EU's credibility at stake in Macedonia". IDSCS: 2017. Skopje. See <http://idscs.org.mk/wp-content/uploads/2017/02/Publication-EU-credibility-at-stake-in-Macedonia.pdf> (accessed 31 January 2017).

When controlling for the ethnicity of the respondents, respondents' answers vary. Ethnic Macedonians perceive the US as the most influential foreign factor (43.5%), followed by the EU (34%) and Russia (3.6%). Compared with last year, it can be concluded that the perceived influence of the EU among ethnic Macedonians has increased (from 24.7% to 34%), while the perceived influence of Russia has significantly decreased (from 29.9% to 3.6%). The tendency among ethnic Albanians to perceive the EU as the most influential power remains the same as last year (53.4%), followed by the USA (34.4%) and Russia (4.5%). In both cases, the US is perceived as the most influential foreign factor for Macedonian citizens.



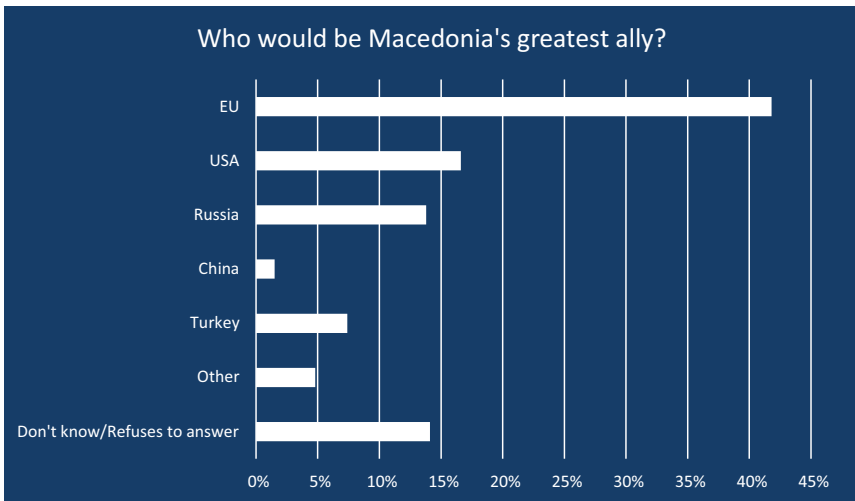
Moreover, the variations across the ethnic lines overlap with the political affiliation of the respondents. In other words, the supporters of the Macedonian political bloc parties perceive the US as a more influential factor than the EU, like in the case of VMRO-DPMNE (49.3% compared with 39.9%), or perceive the two powers as factors with similar influence, like in the case of SDSM (41.0% of the respondents who answered “EU” compared with 39.1% of the respondents who answered “USA”). On the other hand, the situation in the Albanian political bloc is clearer. The supporters of DUI, DPA, and BESA all perceive the EU as the most influential foreign factor in Macedonia (56.3%, 50%, and 51.7% respectively). The only exception is the Alliance for Albanians whose supporters perceive the US as more influential than the EU (44.4% compared with 40.7%).

Which foreign factor has the greatest influence in Macedonia? (controlled for political affiliation)



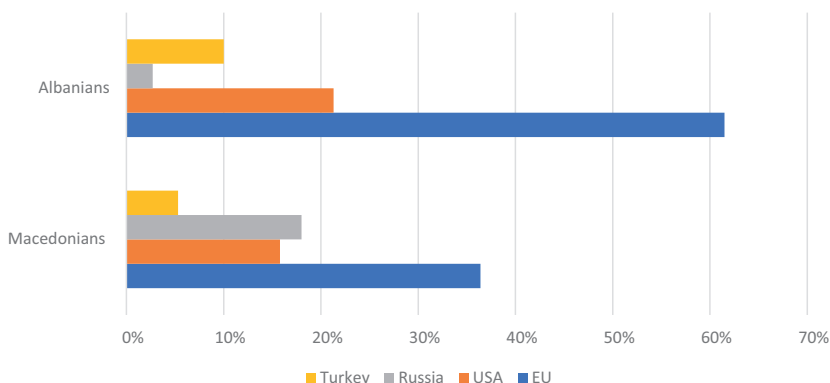
Macedonia's greatest ally

The respondents' perceptions about the country's greatest ally expectedly reveal that the EU is Macedonia's greatest ally (41.8%), followed by the US (16.6%) and Russia (13.8%).



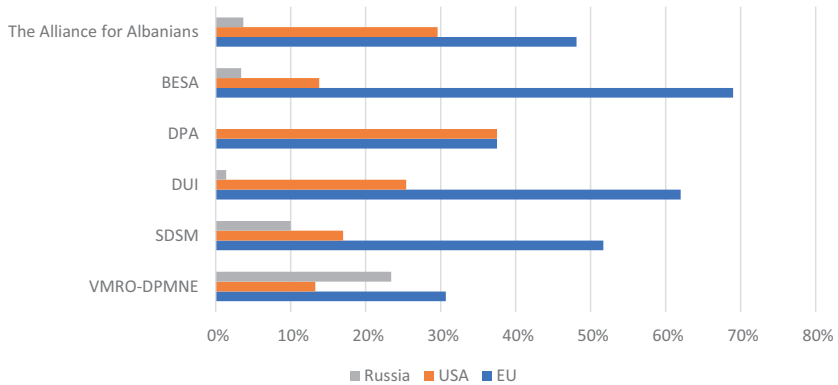
This trend remains even when controlled for the respondents' ethnicity. However, it appears that ethnic Albanians believe in the EU-Macedonia's alliance more than ethnic Macedonians (61.5% versus 36.4%). Additionally, ethnic Macedonians see Russia as the second greatest ally of the country (18%), while ethnic Albanians have that perception for the US (21.3%) and position Turkey as the country's third greatest ally (10%).

Who would be Macedonia's greatest ally?
(controlled for ethnicity)



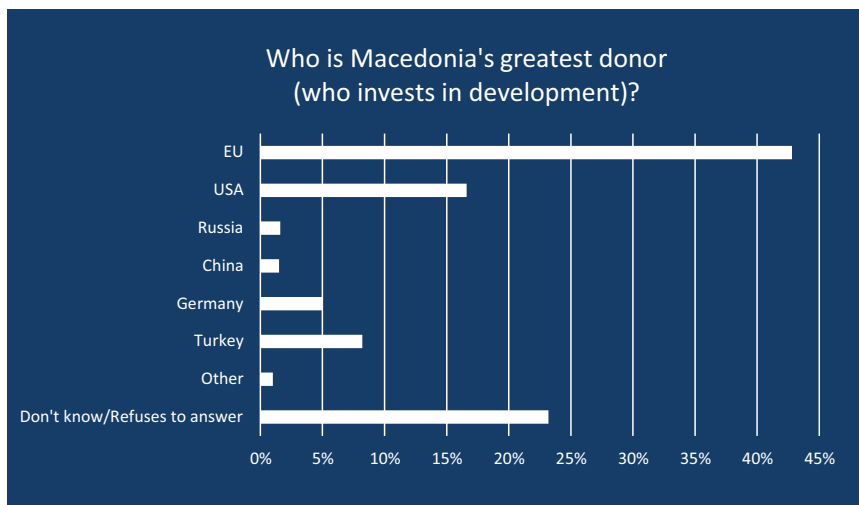
The respondents' perceptions, when controlled for their political affiliation and the ethno-political blocs, reveal why the chart above shows these results. SDSM (51.7%) and VMRO-DPMNE (30.7%) supporters share the perception that the EU is the greatest ally of Macedonia. However, unlike the SDSM affiliates who see the US as the second most important ally of Macedonia (17%), VMRO-DPMNE supporters perceive Russia (23.4%). In the Albanian political bloc, DUI, BESA, and the Alliance for Albanians also see the EU as the greatest ally of the country (62%; 69%; and 48.1% respectively) and the US as the second one (25.4%; 13.8% and 29.6% respectively). DPA supporters see the EU and the US as equally important allies to Macedonia (37.5%).

Who would be Macedonia's greatest ally?
(controlled for political affiliation)



Donors' Presence and Visibility

Novelties in this year's survey are the questions related to the presence of foreign donors in the country and their visibility to the citizens. In this regard, the majority of the respondents (42.8%) perceive the EU as the country's greatest donor, followed by the US (16.6%) and Turkey (8.2%).



In this respect, it appears that Macedonian citizens show a better understanding of the reality given that the EU is indeed the country's greatest donor. This is not the case if we look in comparison with the citizens of other countries from the region. Such case is Bosnia and Herzegovina where the respondents in the International Republican Institute's study named "Bosnia and Herzegovina: Attitudes on Violent Extremism and Foreign Influence" perceived both Turkey and the EU as the country's greatest donors (22%), followed by Germany and Russia (8%), and the US and the Middle-East countries (6%).⁶ In fact, Bosnia's greatest donor is the EU contributing with more than

⁶ Refer to IRI "Bosnia and Herzegovina: Attitudes on Violent Extremism and Foreign Influence" IRI: 2017. at http://www.iri.org/sites/default/files/iri_bosnia_poll_february_2017.pdf (accessed February 22, 2018).

35.000.000 EUR in 2016.⁷ Similarly, as part of an opinion survey conducted in Serbia in 2017, when asked the same question, the respondents placed both the EU and Russia first with 24%, followed by China with 20%.⁸ Again, the greatest donor of Serbia is undoubtedly the EU contributing with 59.9% of the non-repayable international assistance given to Serbia in the period between 2000 and 2016, thus leaving Russia and China far behind.⁹ No significant variations across the demographic categories have been noticed.

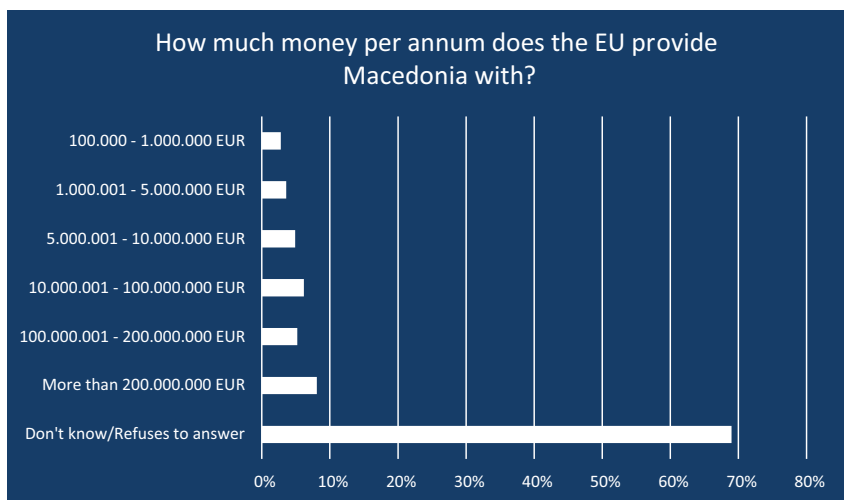
However, when asked about how much money per annum the EU provides Macedonia with, without giving the framework in which they can place their responses, the majority of the respondents are not informed at all about the amount of money provided (69%). Out of the total percentage of informed respondents, the majority (8.1%) think that the EU provides the country with more than 200.000.000 EUR per annum. These findings suggest that EU's visibility, but also strategic communication in Macedonia is rather weak since the majority of the respondents are not informed about its

7 Refer to Ministry of Finance and Treasury of Bosnia and Herzegovina "Pregled aktivnosti donatora 2016" Forum za koordinaciju donatora 2016. at https://www.mft.gov.ba/bos/images/stories/medjunarodna%20saradnja/koordinacija_medjunarodne_pomoci/pregled_aktivnosti/DMR%202016%20-%20Pregled%20aktivnosti%20donatora%20u%202016.pdf (accessed February 22, 2018).

8 Refer to Ministry of European Integrations of Serbia "Evropska orientacija gradjana Srbije" Ministarstvo za evropske integracije 2017. at http://www.mei.gov.rs/upload/documents/nacionalna_dokumenta/istrazivanja_javnog_mnjenja/javno_mnjenje_decembar_17.pdf (accessed February 22, 2018).

9 Refer to Ministry of European Integrations of Serbia "Evropska orientacija gradjana Srbije" Ministarstvo za evropske integracije 2017. at http://www.mei.gov.rs/upload/documents/nacionalna_dokumenta/istrazivanja_javnog_mnjenja/javno_mnjenje_decembar_17.pdf (accessed February 22, 2018).

level of financial contribution to the country.



The role of the EU in promoting rule of law in Macedonia

One of the most obvious changes compared to last year's survey is the perceived role of the EU in the domestic political framework. As mentioned before, in last year's survey, there was a visible rise in the Russian influence in the country in terms of a perceived best ally of Macedonia, while the US was perceived as the most dominant foreign power with the highest leverage in the country, even double than the EU.¹⁰

10 Please refer to Zoran Nechev and Hristijan Petrusevski. "The EU's credibility at stake in Macedonia". IDSCS: 2017. Skopje. at <http://idscs.org.mk/wp-content/uploads/2017/02/Publication-EU-credibility-at-stake-in-Macedonia.pdf> (accessed 31 January 2017).

The visible skepticism and the diminished influence of the EU did not, however, have a spillover effect on the perception that the accession process of Macedonia will contribute to strengthening the rule of law in the country. In 2017, nearly 70% of the respondents gave the answer that the EU accession process will contribute or somewhat contribute to the rule of law in the country.

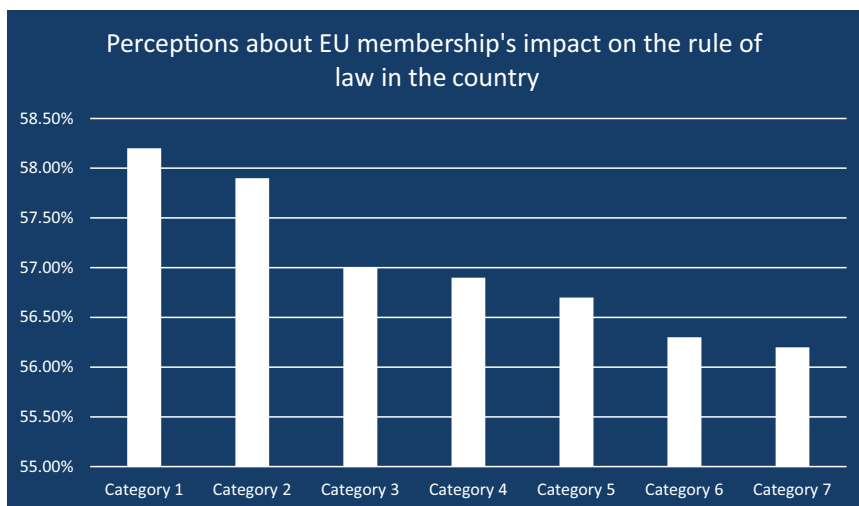
The trend of positive perception of the EU in domestic political processes continues. Namely, respondents to all questions related to the role of the EU over seven different categories have more positive than negative answers, the most positive being the role of the EU in the implementation of court decisions. Judiciary has been constantly one of the institutions with the least confidence among the citizens, thus people invest their expectations for the EU to aid enforcing court decisions. More concretely, 58.2% of the respondents think that the EU will considerably or somewhat contribute to the court judgments being effectively and promptly executed (Category 1). Similarly, as high as 57.9% of the respondents think that the EU will considerably or somewhat contribute to the possibility of conducting fair investigations by the Public Prosecutor's Office (Category 2), which is also a relatively high indicator when it comes to the confidence in the EU in matters related to the judiciary.

Other indicators reveal a similar situation where, in descending order, the respondents have the most confidence in:

- 57.0% of the respondents think that the EU will considerably or somewhat contribute to the stability and consistency of legislation in the country (Category 3);
- 56.9% of the respondents think that the EU will considerably

or somewhat contribute to public authorities' actions on the basis of, and in accordance with standing legislation (Category 4);

- 56.7% of the respondents think that the EU will considerably or somewhat contribute to the prevention of abuse (misuse) of powers by public authorities (Category 5);
- 56.3% of the respondents think that the EU will considerably or somewhat contribute to the increase of the independence of the judiciary in Macedonia (Category 6);
- 56.2% of the respondents think that the EU will considerably or somewhat contribute to guaranteed equality before the law (Category 7);



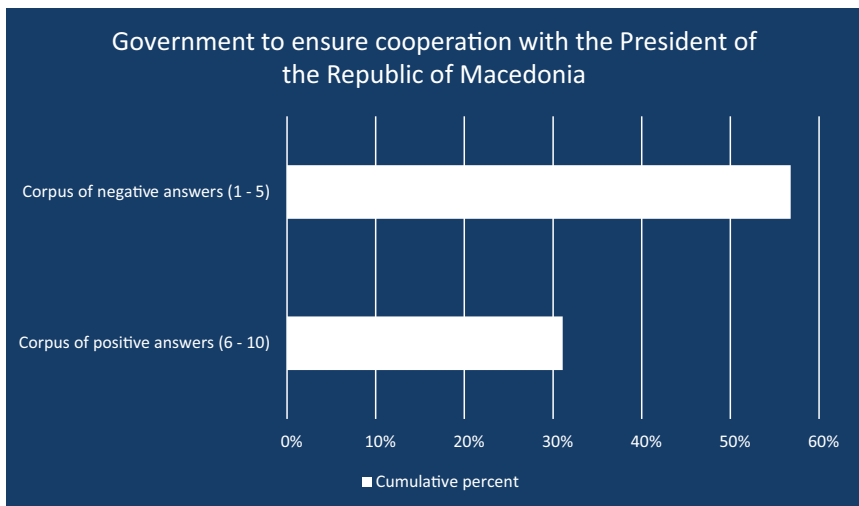
It is obvious that in all categories the general attitude of the respondents is positive and that there is no visible variation

in the attitudes, regardless of the category. However, variation exists on ethnic accounts, given that in all categories ethnic Albanian respondents display greater confidence in the EU than ethnic Macedonian respondents. Moreover, speaking of party affiliation, it is obvious that by far the most optimistic respondents are SDSM supporters followed by DUI and BESA supporters, while the trend of VMRO-DPMNE supporters being most reserved continues in all categories of the question implied. Related to other demographic categories, it is noticeable that people from urban areas express more optimism towards the EU compared to respondents from rural areas (reoccurring pattern).

Confidence in the Government delivering on rule of law issues

Confidence in the work of the Government in light of current political processes and its role in providing functional democracy by decreasing the chances for state capture is a separate topic that evokes mixed feelings among the respondents. Respondents were asked to estimate their confidence in the Government on a scale from 1 (lowest) to 10 (highest) in nine categories. In all nine categories there is visible skepticism on account of the respondents, whereas the cumulative valid percentage of negative answers (1 to 5) that reflect less confidence visibly outweighs the cumulative valid percentage of positive answers (6 to 10) in eight out of nine categories, excluding respondents that refuse to answer or do not know how to answer the question.

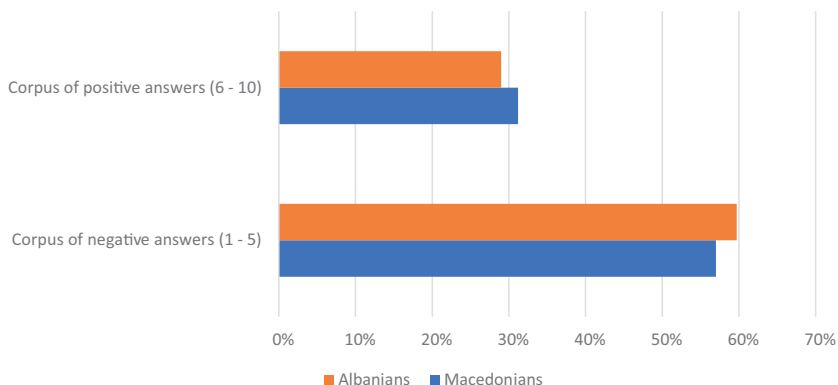
The biggest concentration of negative answers is expressed in the possibility for the Government to ensure cooperation with the President of the Republic of Macedonia. The negative corpus of answers (1 to 5) cumulatively amounts to 56.8%, while the positive answers (6 to 10) amount to 31.1% of the overall sample of respondents. Another indicator points to the fact that this is by far the question that triggers the most profound emotions among respondents, being that the number of most skeptical citizens when it comes to the relation between the President and the Government (respondents choosing 1) is the highest in all questions and amounts to 17.1%, which is short of fifth of the respondents. This certainly indicates that a clear majority of the surveyed population does not believe that cohabitation between the President and the Government is a realistic prospect.



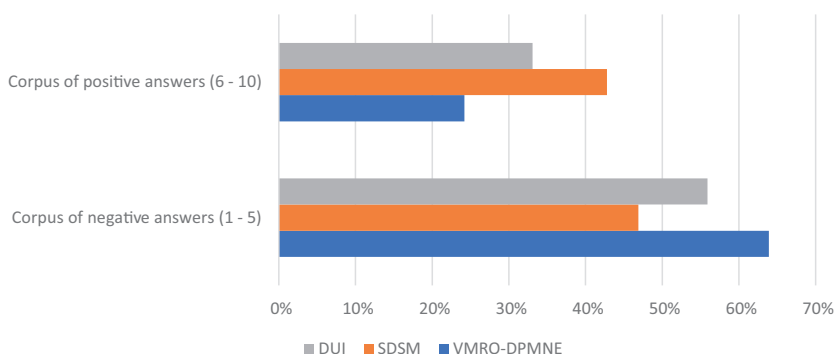
In light of this disposition, Albanian respondents are slightly more skeptical than Macedonian respondents, whereas skepticism grows more or less evenly as the education level of respondents gets higher. Conservative voters, as expected,

are much more cynical regarding the question (VMRO-DPMNE voters), unlike SDSM and DUI voters who express more positive attitudes when it comes to cohabitation between the Government and the President of the country.

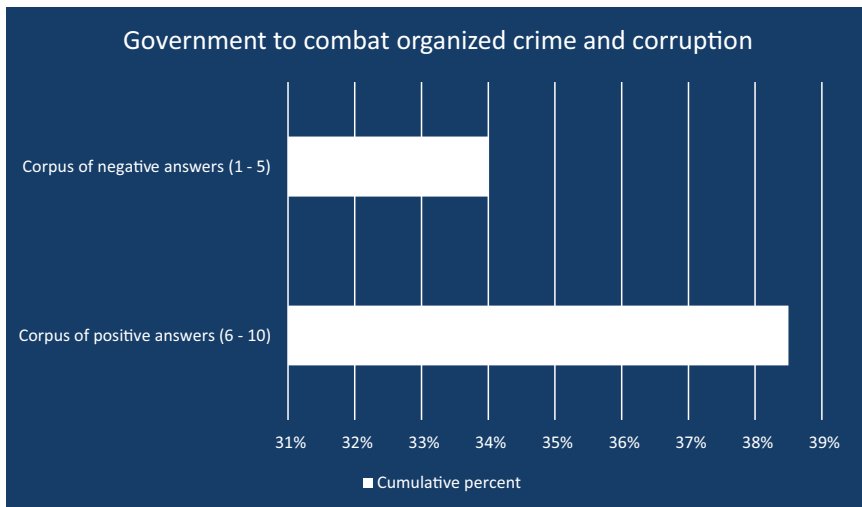
Government to ensure cooperation with the President of the Republic of Macedonia (controlled for ethnicity)



Government to ensure cooperation with the President of the Republic of Macedonia (controlled for political affiliation)

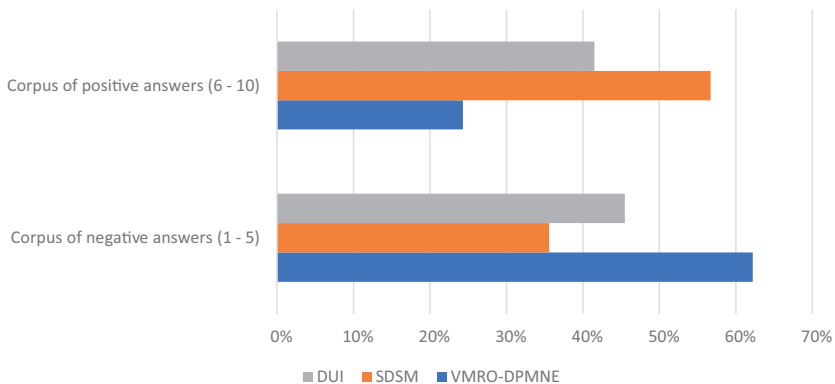


In contrast to the cohabitation prospects, the only category, of all nine, where positive attitudes are more frequent than negative ones are the expectations invested in the Government when it comes to combating organized crime and corruption. In this specific case, the positive answers account for 38.5% while the negative answers account for 34.0%.



This is by far the question where respondents are the most optimistic, whereas the number of most skeptical and least skeptical respondents is the same in this question (16.1%). The most optimistic statistical group, by far, are the voters of SDSM whereas conservative supporters (VMRO-DPMNE) are considerably more skeptical when it comes to the possible success of the Government in combating organized crime and corruption.

Government to combat organized crime and corruption
(controlled for political affiliation)



However, the rest of the indicators related to the success of the Government in addressing vital social issues that roughly define the spheres where state capture usually occurs, indicate a more reserved position of the respondents. If one is to make a list from the most to the least optimistic positions regarding the surveyed categories, then it is obvious that the respondents are the most reserved when it comes to the Government succeeding in the departmentization of the public administration. The cumulative percentage of negative answers accounts for 53.1% versus 35.5% of positive answers. There is a statistically irrelevant difference on ethnic account when it comes to the two biggest ethnic groups in the country, meaning that both ethnic Macedonians and ethnic Albanians share the same negative view on the possibility for establishing professional administration. Negative stances regarding the question increase as education among respondents rises, while considerable differences do appear when the party perspective is being analyzed. VMRO-DPMNE voters, once

again, are much more pessimistic when it comes to the possibility for the Government of the Republic of Macedonia to succeed in departing the public administration, compared to SDSM and DUI voters.

The rest of the indicators, in order from the most negative to more positive stances of the respondents, regard the hypothetical accomplishments of the Government in the creation of an independent and efficient judiciary, regaining confidence in the secret services as well as the possible liberation of the media space from political influence. In the first case - creating an ambient for independent, impartial, professional and efficient courts, the negative answers account for 50.6% while the positive answers account for 38.7%. In the second case, regaining the confidence in the security and counterintelligence services, similar percentages are aggregated – exactly half of the respondents have a negative stance, while the optimists' campus accounts for 37.6% of all respondents. In the third case regarding the liberation of the media space from political interferences, the negative campus accounts for less than half of the respondents i.e. 49.5% while the positive answers were an option for 39.5% of the respondents, indicating a slightly less cynical position among the respondents than in the previous two questions.

Analyzing these three categories from the perspective of demographic categories, some similarities can be drawn in all three cases. In the first case, ethnic Macedonians are somewhat more skeptical than the Albanians that the Government could succeed in creating an independent and impartial judiciary, while the level of education does not affect in any conclusive way the standpoints on this question. Additionally, the most skeptical category of citizens (choosing 1) comes from the NGO

sector employees, while VMRO-DPMNE voters are once again more pessimistic than SDSM and DUI voters. Speaking of the possible success of the Government in regaining confidence in the security and counterintelligence services, there are no considerable differences in the skepticism expressed by ethnic Macedonians and ethnic Albanians, while the only visible difference in demographic categories is the recurring pattern of conservative voters being more skeptical than pro-government voters (SDSM and DUI). The question on the possible success of the Government in the liberation of the media space from political interferences from a demographic perspective does not indicate any specificity except for the expected political orientation where conservative voters are once again the most skeptical group of respondents. It seems that the most decisive category in all mentioned cases is political affiliation while ethnicity and education levels play a marginal role.

The last two addressed questions do not regard directly the issues related to spheres where possible state capture could occur, but are related to one systemic and one current political problem. Namely, the first question regards the confidence of the respondents in the Government in enabling parliamentary oversight over its work where 49.7% of the respondents have reserved standpoints unlike 38.2% of the respondents that express some level of confidence. The second question concerns the confidence of the respondents towards the Government in providing a majority for the adoption of the Law on the use of languages (Law on languages) where, similarly to the previous question, the cumulative valid percentage of negative standpoints accounts for 45.3% unlike the positive cumulative percentage of standpoints, which accounts for 40.6%. In both questions, as in the previous

ones, the only relevant demographic category where visible and considerable variance is present is party affiliation, with conservative voters being more skeptical than voters belonging to DUI and SDSM.