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# What now? The uncertainty of North Macedonia's EU accession in 2019

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# Impressum

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# Introduction

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Since 2016, the Institute for Democracy “Societas Civilis” – Skopje (IDSCS) conducts a nationwide, representative opinion poll in cooperation with the North Macedonia Office of the Konrad-Adenauer-Foundation on questions relevant to the EU integration process of the country.

While certain questions have remained the same over the years, others were adjusted to specific events of the corresponding year. That way, the research allows both comparative analyses of trends and changes in public opinion, while equally throwing light on the general attitude about relevant short-term political occurrences. Questions in this year’s edition look in more

detail at the non-decision on opening accession negotiations in the European Council. For even more detailed insight, the analysis turns to cross-tabulation on 1) political orientation/ partisanship and 2) ethnicity. This allows drawing clean lines between different political and ethnic groups in the country, offering insight into the level of politicization among the general public.

The public opinion survey 2019 was conducted between 16.11.2019 and 01.12.2019 and is based on a representative sample of 1000 respondents.

# Methodology

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In terms of EU integration, 2019 was an eventful year for North Macedonia. The year was equally optimistic and devastating for the membership aspirations of the country. At the beginning of 2019, the authorities of North Macedonia and Greece, notwithstanding controversies in both countries, ratified the Prespa Agreement, finally ending the long-standing name dispute and opening the gates for Macedonian negotiations for EU and NATO membership, or so was the promise. The deal was welcomed fulsomely by the European Commission which kept insisting on the readiness of North Macedonia to open the first

chapter of accession negotiations. French national interests, hence a veto to begin negotiations with North Macedonia in the European Council, upset the Commission's plans and harmed the credibility of the EU among the Macedonian public and the trust into its own government. Unsurprisingly, the results of the IDSCS 2019 Public Opinion Analysis show trends of further growing polarization of sentiments towards the European future of North Macedonia. At the end of 2019, North Macedonia is again facing an uncertain domestic and European future, preparing for snap elections in spring 2020.

# General Trends

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In the 2019 Public Opinion Analysis, two trends stand out, one concerning the attitude towards the prospect of EU membership and the other concerning sentiments towards Russia as a potential ally of the country.

As Chart 4 shows, respondents still value the European Union as a foreign factor with significant influence (in comparison to last year even growing by 10%) and see, as Charts 5 and 6 reveal, a great ally and, by distance, the most important donor in the country. Still, the drawback from the negative outcome in the European Council is clearly visible in the results under Chart 1: When asked about the possibility of timely starting accession negotiations, the majority of responses depict a gloomy picture. Looking for answers why

this decision happened - France stands in the spotlight, but not quite alone – respondents call all stakeholders offered in the survey to responsibility, however with clear partisan tendencies: the electorate of VMRO-DPMNE settles their score with the SDSM government's perceived inability to comply with EU demands, directly criticizing the Government's approach to EU integration. SDSM's electorate is less harsh on their government.

Similarly, it is predominantly the VMRO-DPMNE electorate turning eastward. After decline of interest in the past edition, Russia seems to be back in the game being again more strongly perceived as a strong ally, for the first time in a while even by a growing group of ethnic Albanians. While support for Russia still remains way

below the approval rates of the European Union or the perceived support received from the USA, having a good fourth of respondents considering membership in the Eurasian Union as a viable alternative to EU membership should send out a strong signal to Brussels (or Paris, for that matter). Furthermore, non-voters tend to show even stronger affinity with Russia suggesting politisation and strong political sentiments beyond traditional party structures.

Equally interesting is the diversification among the Albanian electorate. While public analyses over the years have usually showed distinctive differences among both party and ethnic lines, this year's edition shows more similar trends between governing (SDSM and DUI) vs. opposition (VMRO-DPMNE and other Albanian) parties, underlining the growing level of politisation in comparison to e.g. ethnic tensions.



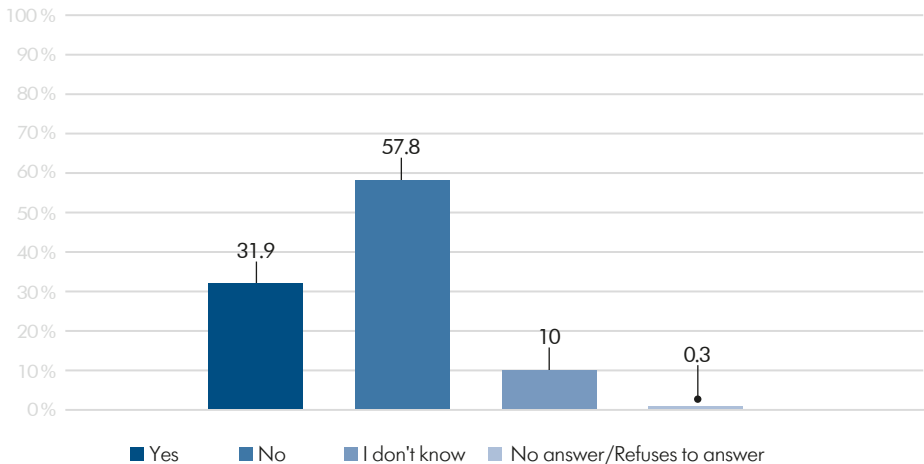
# 1. Indefinitely side-lined?

Starting off with the uncertainty about the further development of the accession progress of North Macedonia, the 2019 edition on the public opinion asks respondents whether they expect a date

for the start of accession negotiations with the EU in 2020.

The majority (57.8%) does not believe that this would be the case, while a

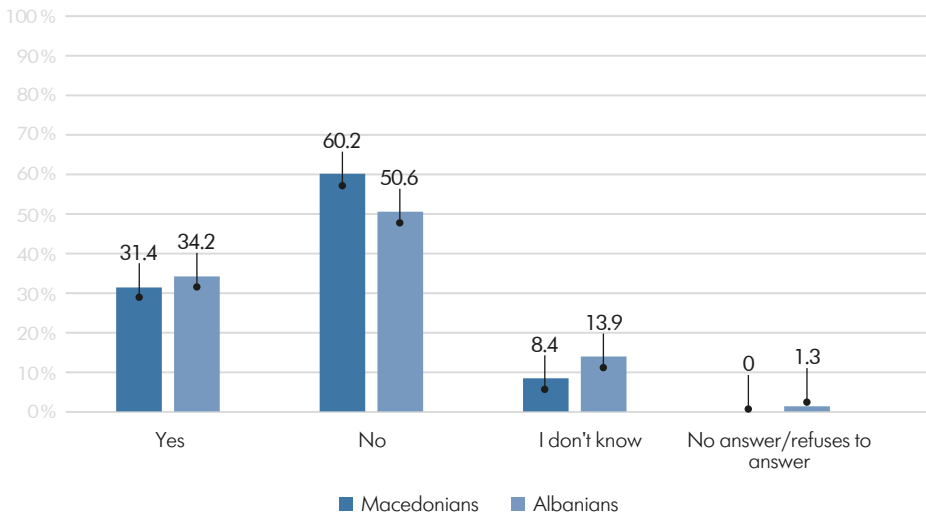
**Chart 1.** Do you think that North Macedonia will get a date for the start of accession negotiations with the EU next year (2020)?



third (31.9%) remains optimistic that this could happen. This is definitely a turn-around from 2018, when half of the respondents expressed their belief that North Macedonia would join the EU within the next 5 years and a clear response to

the disillusion experienced in 2019 by the postponement of a decision of opening accession negotiations in the European Council, despite the name change and consistent reinforcement by the European Commission..

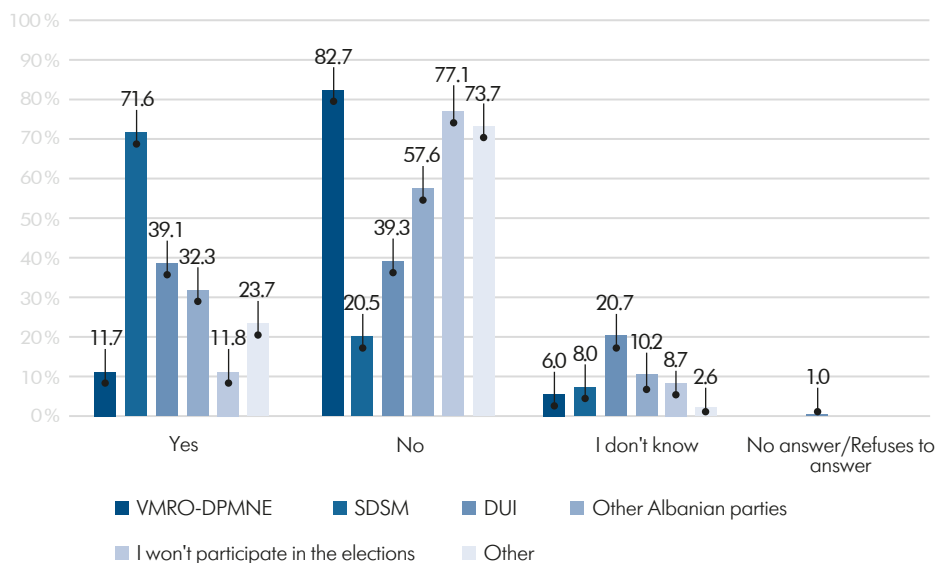
**Chart 1.1.** Do you think that North Macedonia will get a date for the start of accession negotiations next year (2020)? (controlled for ethnicity)



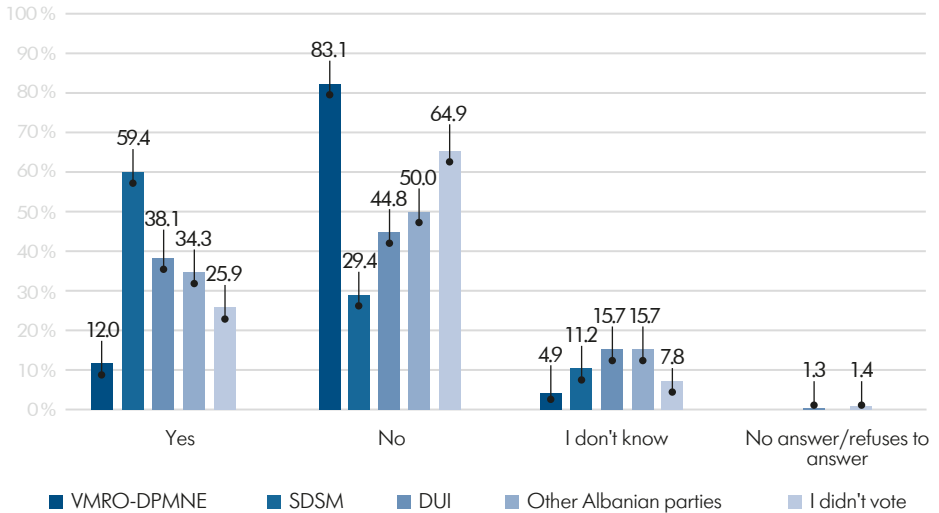
Among ethnic Macedonians, the disbelief is even higher at 60.2%, yet ethnic Albanians show only insignificantly greater optimism than ethnic

Macedonians and, instead, more of this group remain undecided. Partisanship, on the other hand, impacts on having significant differences in attitude.

**Chart 1.2.** Do you think that North Macedonia will get a date for the start of accession negotiations with the EU next year (2020)? (controlled for partisanship, if parliamentary elections take place tomorrow, which political party are you going to vote for)



**Chart 1.3.** Do you think that North Macedonia will get a date for the start of accession negotiations with the EU next year (2020)? (controlled for partisanship, which political party did you cast your vote for in the last parliamentary election?)



Supporters of SDSM strongly believe in the timely opening of accession negotiations with a fixed date in 2020 (71.6%), while the electorate of VMRO-DPMNE stands even more unequivocally

on the other side: 82.7% of this group do not believe that North Macedonia will get a date for accession in 2020. In this attitude they are accompanied by non-voters. The Albanian electorate is less polarized on

this question: While voters of DUI are split even between “Yes” and “No”, the electorate of other Albanian parties leans towards the “no”, yet less distinctively than the VMRO-DPMNE electorate or non-voters. The DUI electorate is also the least decided on which side to choose with one fifth checking “I don’t know” and, thereby, poses an overall interesting case: DUI has been the longest-standing coalition partner in North Macedonia, teaming up with both sides of the political spectrum. In the most recent government, DUI politician Bujar Osmani was Deputy Prime Minister of the Government for European Affairs and, as such, responsible for the EU reform process. Despite this key figure in the EU integration process from their own lines, DUI is seemingly not able to convince their own electorate of North Macedonia’s optimistic European outlook.

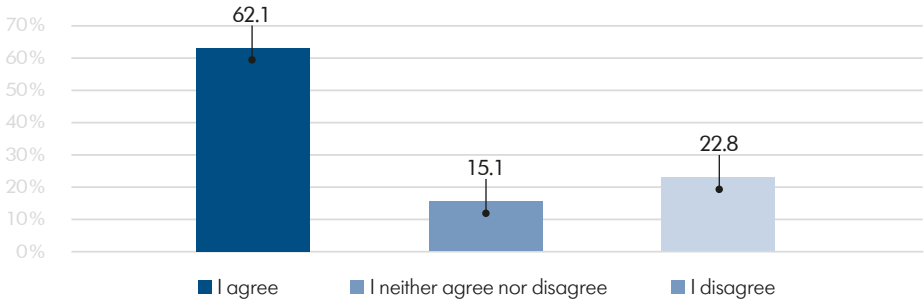
## 2. It’s you, it’s me, it’s everyone. Factors for the negative European Council outcome

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To further examine why respondents lean to one or the other side, survey participants were asked to give their opinion on different factors highlighted by various actors as reasons why the accession process of North Macedonia is not progressing towards a start of negotiations. Respondents could choose between 1) I fully agree, 2) I somewhat agree, 3) I neither agree nor disagree, 4) I somewhat disagree, and 5) I fully disagree. For the purpose of better readability, 1) and 2) are grouped to “I agree”, and 4) and 5) are grouped to “I disagree”.

## FRANCE'S POSITION

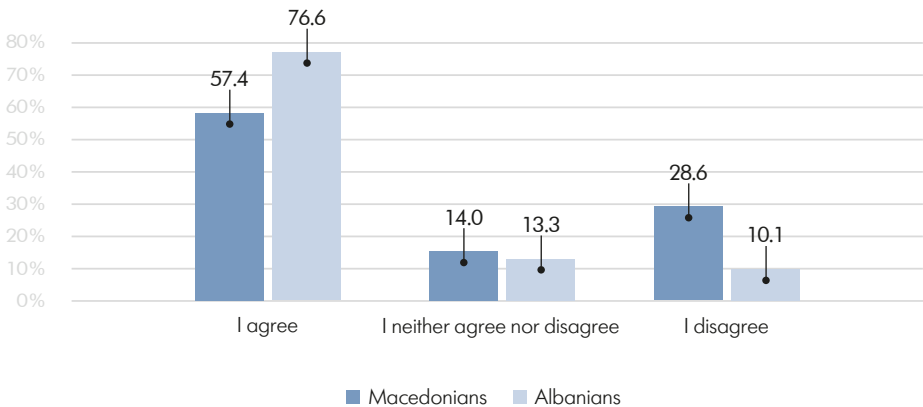
**Chart 2.** France's position is the main reason



Respondents agree on all three factors by a big majority. 62.1% see the main blockade in France, 74.6% call out insufficient domestic reform and, as such,

a failure to comply with EU conditionality, and 62.4% also consider the need for internal reforms in the EU as a crucial factor.

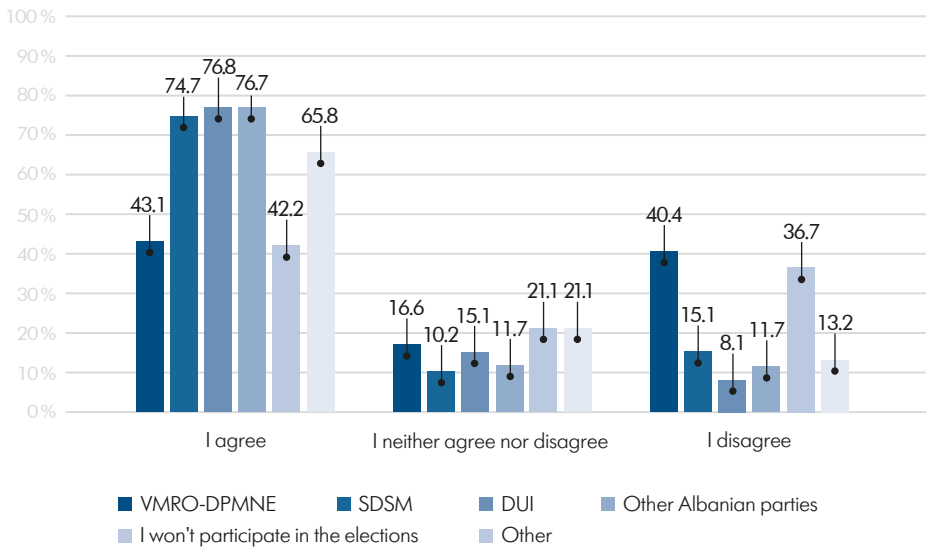
**Chart 2.1.** France's position is the main reason (ethnicity)



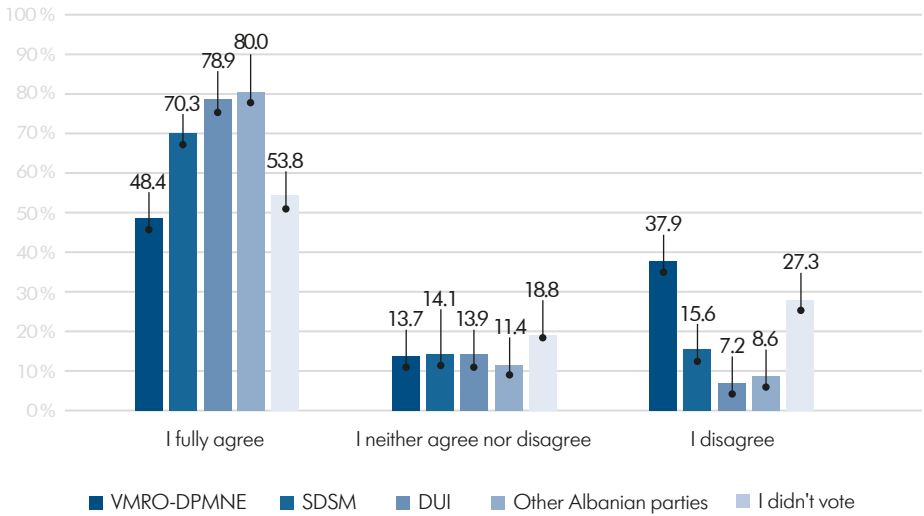
Ethnic Albanians are harder on France than ethnic Macedonians: 76.6% consider Macron's "non" as crucial factor and only

10.1% disagree, compared to 57.4% of agreement among ethnic Macedonians and 28.6% of disagreement.

**Chart 2.2.** France's position is the main reason (if parliamentary elections take place tomorrow, which political party are you going to cast your vote for?)



**Chart 2.3.** France's position is the main reason (which party did you cast your vote for in the last parliamentary elections?)



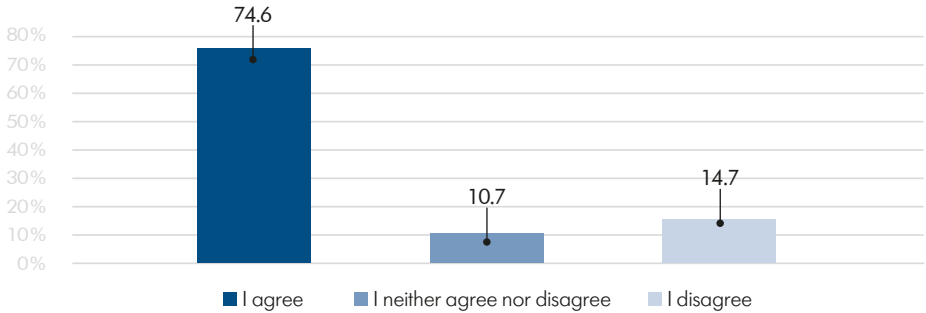
Opinions among different electorates are balanced with the exception of VMRO-DPMNE and non-voters: here,

results are balanced out between agreement and disagreement.



## DOMESTIC REFORMS

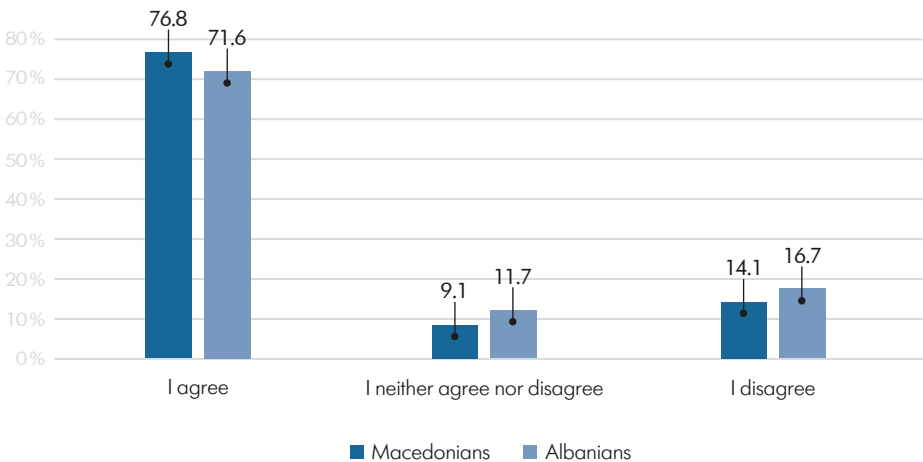
**Chart 3.** The failure to fulfil the conditions related to domestic reforms



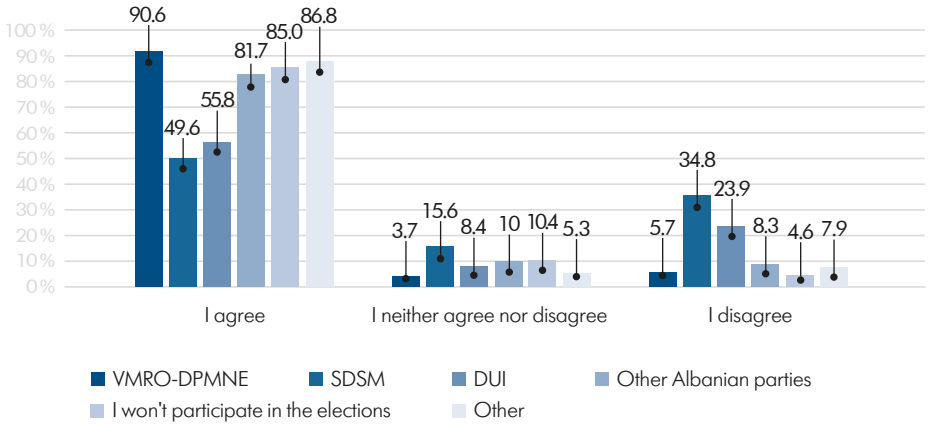
Interestingly, yet not surprisingly, partisanship matters much in regards to the second factor which is the

noncompliance of the government with EU conditionality and its ability to implement domestic reforms.

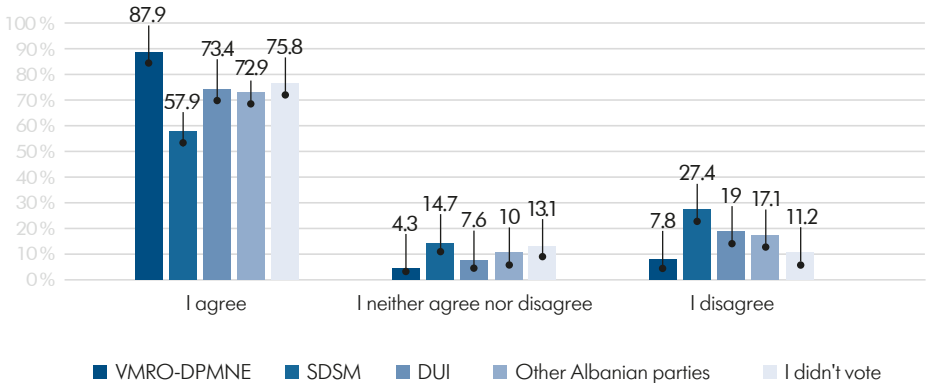
**Chart 3.1.** The failure to fulfil the conditions related to domestic reforms (ethnicity)



**Chart 3.2.** The failure to fulfil the conditions related to domestic reforms (if parliamentary elections take place tomorrow, which political party are you going to cast your vote for?)



**Chart 3.3.** The failure to fulfil domestic reforms (which political party did you cast your vote for in the last parliamentary elections?)

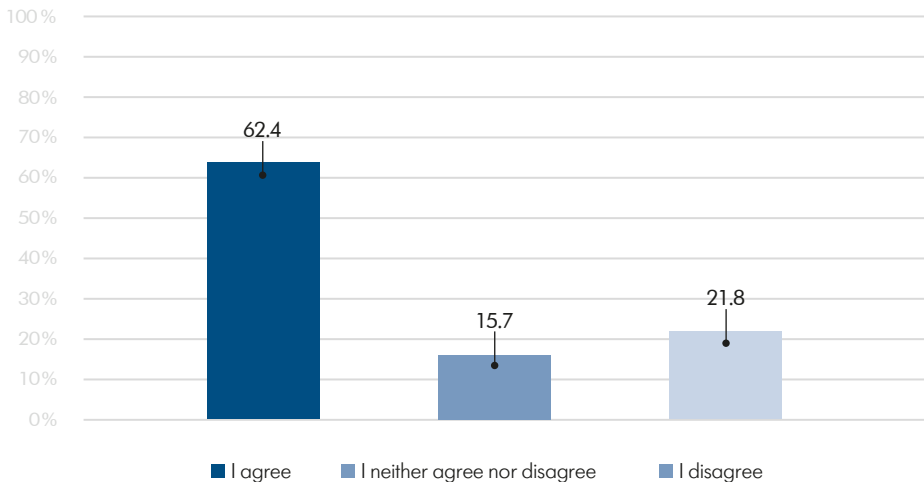


Only among the SDSM electorate, followed by the DUI electorate, and voters of parties in government, at least a fourth (DUI) or even a third (SDSM) disagrees that this is a crucial factor. 49.6% of SDSM supporters and 55.8% of DUI supporters call the Government to responsibility, which is considerably less

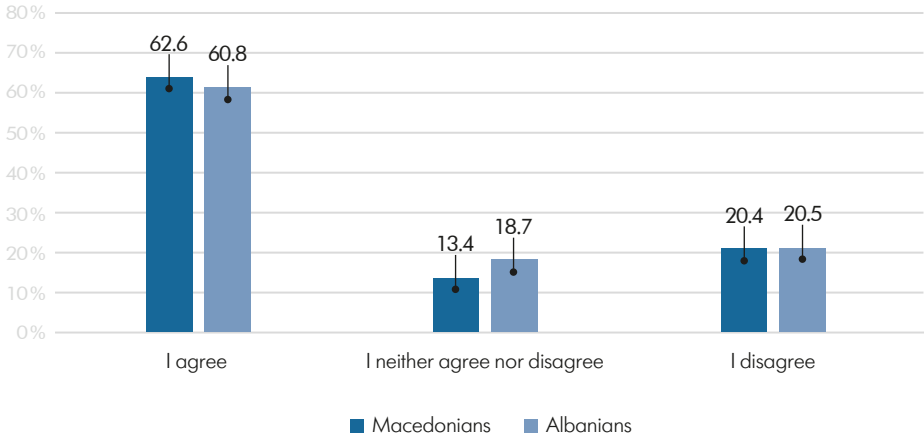
than supporters of other parties who, by means of this response, directly criticize the Government. Especially VMRO-DPMNE supporters see the fault on the side of the Macedonian Government: 90.6% agree on this factor. Ethnicity, on the other hand, does not matter much when it comes to this question.

## EU REFORM

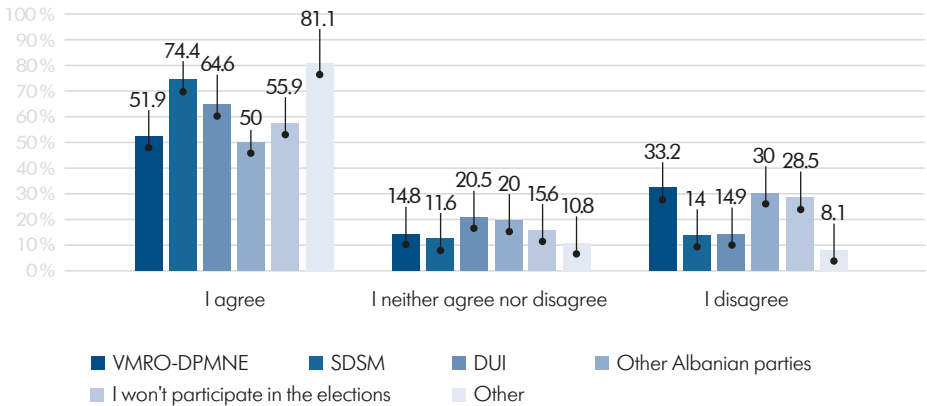
**Chart 4.** The need for internal reforms in the EU



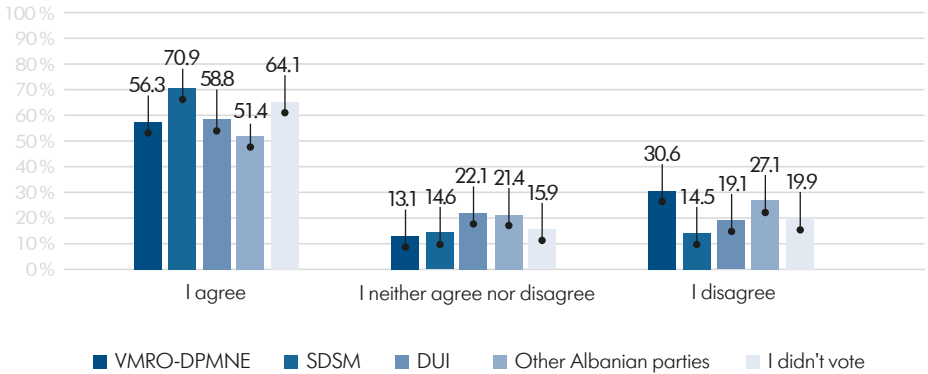
**Chart 4.1.** The need for internal reforms in the EU (ethnicity)



**Chart 4.2.** The need for internal reforms in the EU (if parliamentary elections take place tomorrow, which political party are you going to cast your vote for?)



**Chart 4.3.** The need for internal reforms in the EU (which political party did you cast your vote for in the last parliamentary elections?)



While the electorate of SDSM is more hesitant to call out their own government, this group is more confident to see a main issue in the need for internal reform of the EU: 74.4% of SDSM supporters stand by this opinion. The electorate of VMRO-DPMNE is less likely to use the EU as a scapegoat: 51.9% would agree to the EU's need to reform as a factor, yet a good third disagrees, similarly as the electorate

of other Albanian parties and non-voters. The electorate of all Albanian parties is the least decided on this matter: a fifth does neither agree nor disagree, which is also reflected in a fifth of ethnic Albanians who are undecided. Other than that, ethnicity is again not a relevant variable to reflect these results. Instead, the political orientation of respondents clearly reflects different sentiments in the general public.

### 3. Eastbound flirtation. The Eurasian Union as a potential alternative to EU membership

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The year of 2019 was again characterized by a downer for the EU membership aspirations of North Macedonia, yet the majority of respondents still do not orient towards the Eastern alternative, the Eurasian Union. Formalized in 2015, the Eurasian Economic Union can be regarded an Eastern European, post-Soviet counterpart to the European Union, which has also been welcoming to states in the region whose association efforts

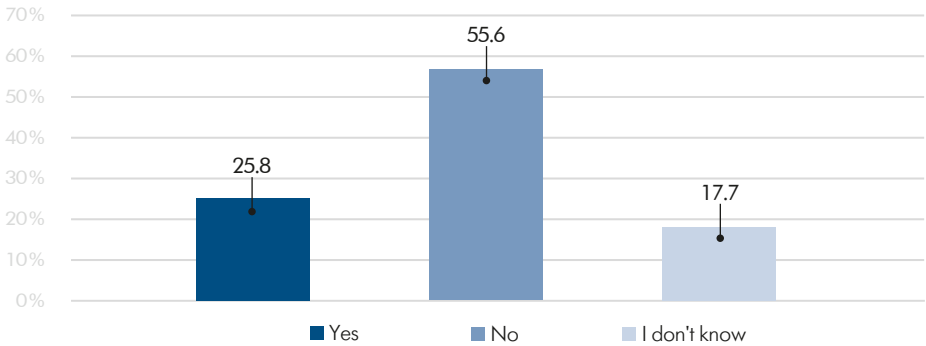
with the EU have not been successful.<sup>1</sup> The Eurasian Union, where Russia's president Vladimir Putin is commonly considered the power broker, has also early on shown ambitions to reach out to the Western Balkans where Serbia, as first state from the region, signed a free trade agreement with the Eurasian Union in October despite opposition from Brussels.<sup>2</sup> This controversial deal was fixed only shortly after the negative outcome in the European Council on North Macedonia and Albania that same month. Under these circumstances, having a fourth of respondents (25.8%) considering membership in the Eurasian Union over the European Union should send a strong signal to decision-makers in the European Union that in times of dwindling credibility, Macedonians keep their eyes open for a Plan B.

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<sup>1</sup> Sean P. Roberts & Arkady Moshes (2016). The Eurasian Economic Union: a case of reproductive integration?, *Post-Soviet Affairs*, 32:6, 542-565, DOI: 10.1080/1060586X.2015.1115198

<sup>2</sup> Milica Stojanovic: Serbia signs Trade Deal with Russia's Eurasian Union. BIRN, 25.10.2019. <https://balkaninsight.com/2019/10/25/serbia-signs-trade-deal-with-russias- Eurasian-union/26, 2018>).

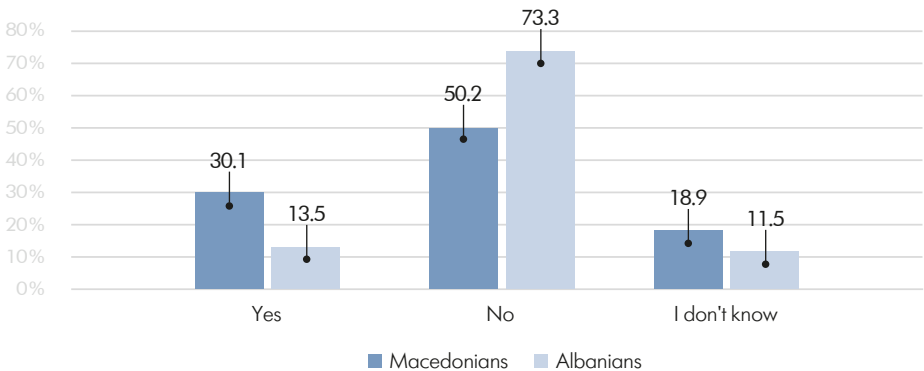
**Chart 5.** Do you think that the membership of North Macedonia in the EAU is an alternative to EU membership?



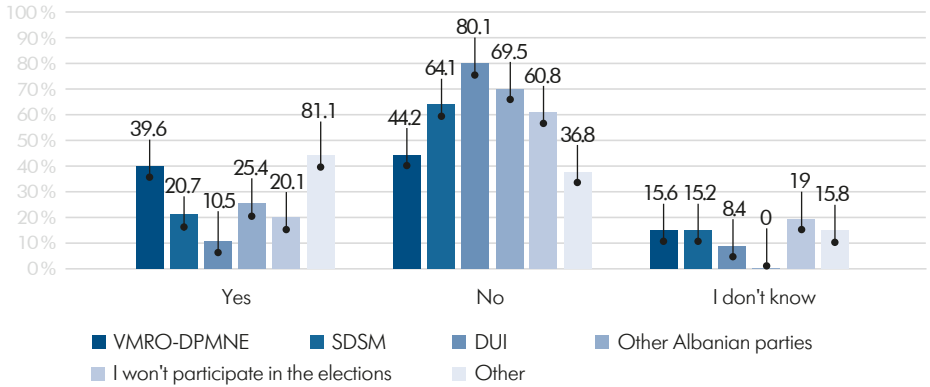
Especially VMRO-DPMNE voters and non-voters are turning against the EU in search of better alternatives. On the other hand, ethnic Albanians still have the direction of

their integration clearly defined westwards, and so has the electorate of SDSM which does not see the Eurasian Union as a viable alternative to the European Union.

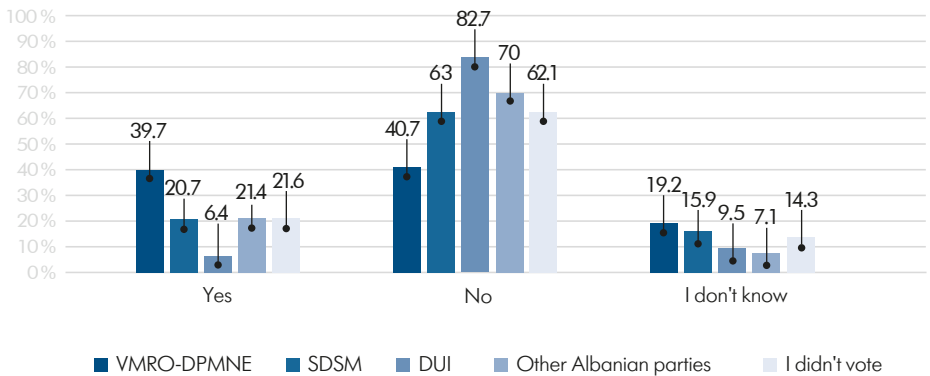
**Chart 5.1.** Do you think that the membership of North Macedonia in the EAU is an alternative to EU membership (ethnicity)



**Chart 5.2.** Do you think that the membership of North Macedonia in the EUA is an alternative to EU membership? (if parliamentary elections take place tomorrow, which political party are you going to cast your vote for?)



**Chart 5.3.** Do you think that the membership of North Macedonia in the EUA is an alternative to EU membership? (which political party did you cast your vote for in the last parliamentary elections?)



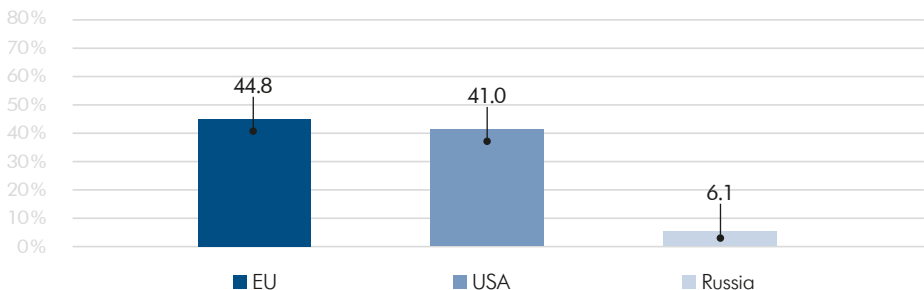


## 4. Contested territory? Foreign Factor Influence in North Macedonia

Looking at external factors which influence policy making in North Macedonia, the research asks for greatest foreign factor influence, greatest ally, and biggest donor in the country. In regards to foreign factor influence, the EU and the US are shoulder to shoulder with 44.8% of respondents who see the EU as most influential and

41% assigning this role to the USA. Also considered by the data set is Russia, who is regarded to be most influential by 6.1% of respondents. While Russia's influence might not seem to be considered meaningful by the vast majority of respondents, their perception has still increased by almost 3% since last year's analysis, signalling a growing importance of Russia as a foreign factor in North Macedonia. Furthermore, in comparison to last year, majorities have changed at the top seats: In 2019, the USA were still considered most influential by 49% of the respondents. The EU gained almost 10% more confidence in their influence.

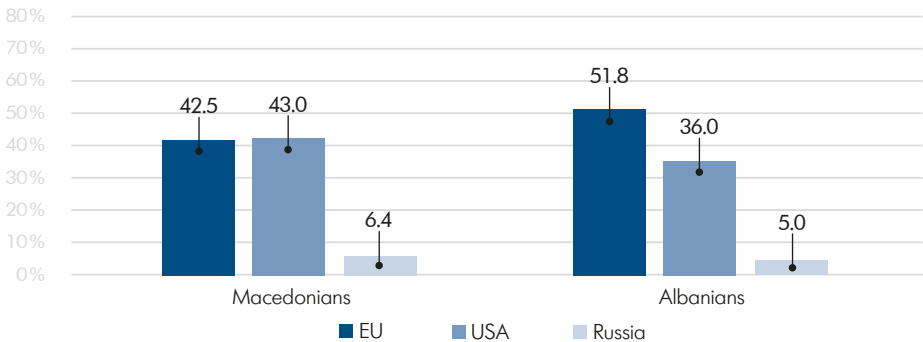
**Chart 6.** According to you, which foreign factor has the greatest influence in North Macedonia?



This is a trend that can be observed since 2017 among ethnic Albanians who, again, consider the EU as more influential by considerable difference to the USA. However, ethnic Macedonians discontinue

the trend of earlier years: the EU (42.5%) and the US (43%) are level-pegging. Both groups consider Russia slightly more, with some more ethnic Macedonians assigning the most influential role to Russia.

**Chart 6.1.** According to you, which foreign factor has the greatest influence in North Macedonia? (ethnicity)



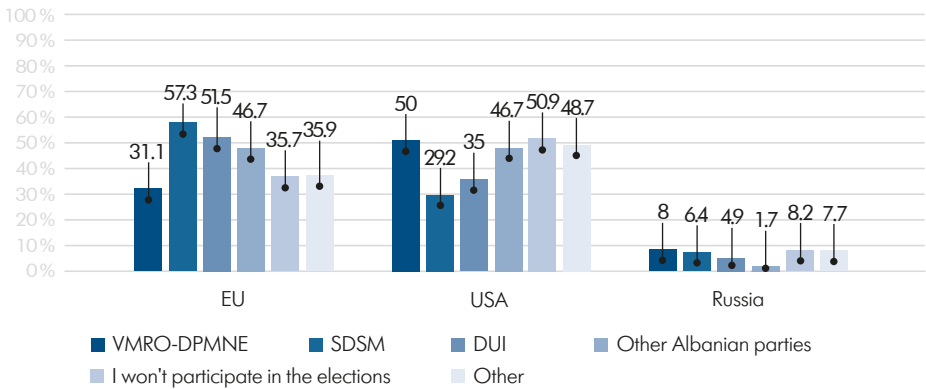
When checking for voting behaviour, VMRO-DPMNE supporters clearly express their opinion in favour of the USA as the most influential foreign factor (50% for USA vs. 31.1% for the EU), while SDSM supporters show clear favours for the EU (57.3% for EU vs. 29,2% for USA). DUI supporters decide similarly to the SDSM electorate on that matter, if with slightly closer difference (51.5% for EU vs. 35% for USA), while the electorate of other Albanian parties does

not give their preference away: the US and the EU both lie at around 47%. Respondents who have not participated or have no intention of participating in the upcoming elections show similar patterns to the VMRO-DPMNE electorate. Comparing these results to former years, VMRO-DPMNE supporters have deviated the least from their former position. The year before USA was as well leading the ranks with 51.6%, followed by the EU (35.3%), and Russia

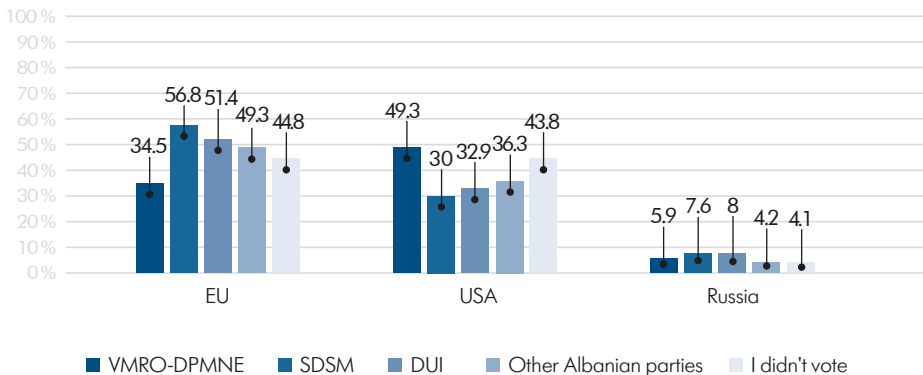
(7.6%). Supporters of SDSM and DUI, on the other hand, have turned the tables in favour of the EU. While the US enjoyed 46,7% among SDSM and 50% among DUI supporters in 2018, those numbers

have dropped to 29,2% (SDSM) and 35% (DUI) in 2019. The EU's perceived influence has grown from 40.7% (SDSM) and 38.5% (DUI) to 57.3% (SDSM) and 51.5% (DUI) respectively.

**Chart 6.2.** According to you, which foreign factor has the greatest influence in North Macedonia? (if parliamentary elections take place tomorrow, which political party are you going to cast your vote for?)



**Chart 6.3.** According to you, which foreign factor has the greatest influence in North Macedonia? (which political party did you cast your vote for in the last parliamentary elections?)

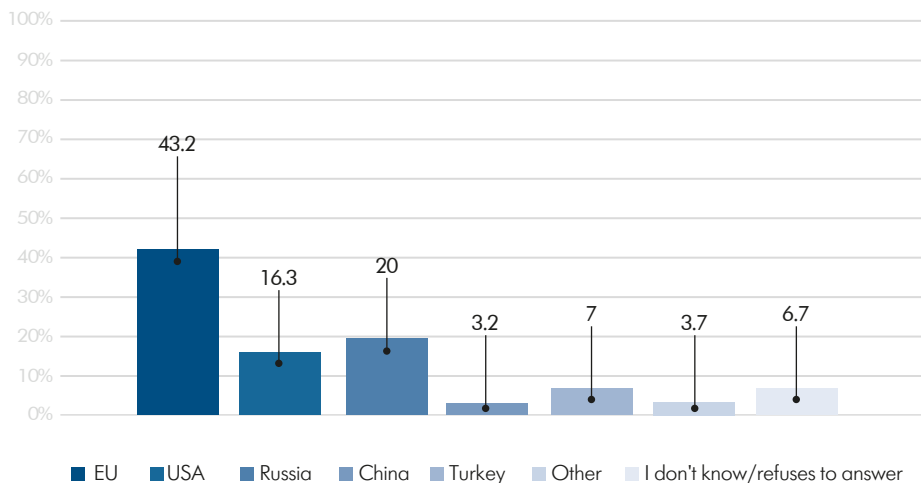


## 5. In EU we trust: North Macedonia's greatest ally

In the 2018 edition of this research, foreign factor influence and greatest ally did – interestingly – not harmonize. While the USA were considered more influential, the

EU was considered the greatest ally by a distance of 18.3%. Now, both charts show more similar trends and at the same time, the gap between the EU and the USA as greatest allies further increases (43.2% for EU vs. 16.3% for USA). Furthermore, Russia has overtaken the USA: 20% of respondents (which is however the same amount as the year before and less than in 2016) consider Russia to be the greatest ally of the country.

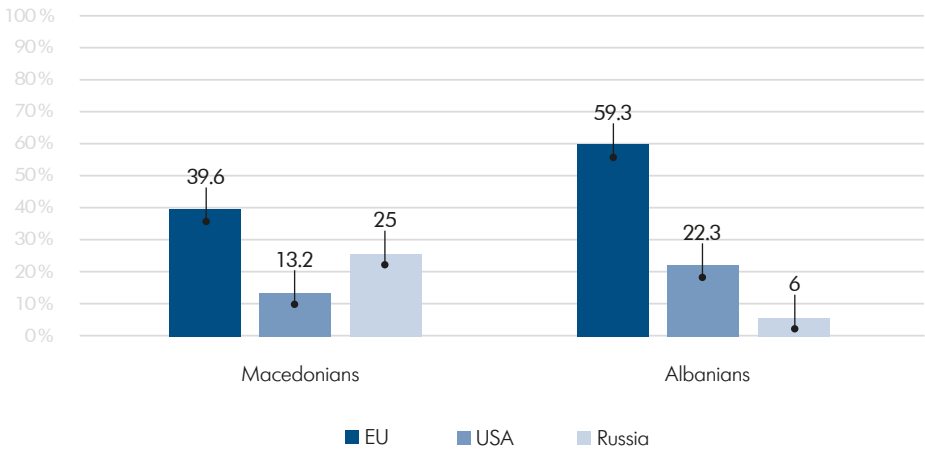
**Chart 7.** According to you, who would be North Macedonia's greatest ally?



Insight into the ethnicity reveals that many more ethnic Macedonian respondents (24.8%) consider Russia to be the greatest ally in comparison to ethnic Albanian respondents (5.7%). While the graph on ethnic Macedonians reflects the 2018 results if with small change in the numbers, majorities among ethnic Albanians have changed drastically. Only 22.3% of this

group continue to consider the US as the greatest ally, and compared to the former opinion poll, this describes a drop by almost 20%. The biggest part of this group has, instead, turned towards the EU, whose support has increased by 15%. Interestingly, Russia enjoys (for the first time as distinctively) 5.7% of support from the group of ethnic Albanians.

**Chart 7.1.** According to you, who would be North Macedonia's greatest ally?



This trend is also reflected among the electorate of Albanian parties. While the DUI electorate remains sceptical towards Russia as was the case in recent years, 11.7% of the electorate of other Albanian parties – which had been just as reluctant towards Russia in years before – speaks now in favour of Russia. Even more reliant on Russia are non-voters (21.8%), the electorate of VMRO-DPMNE (39.1%) and the supporters of other, smaller parties (51.3%). This must certainly be connected to the country's name change in 2019, which had been always most strongly opposed as a compromise for EU accession by the VMRO-DPMNE electorate. Already before the Prespa Agreement, and with it, after the name change of the Republic of North Macedonia took effect, Russian officials expressed their support for the national sovereignty and self-determination of

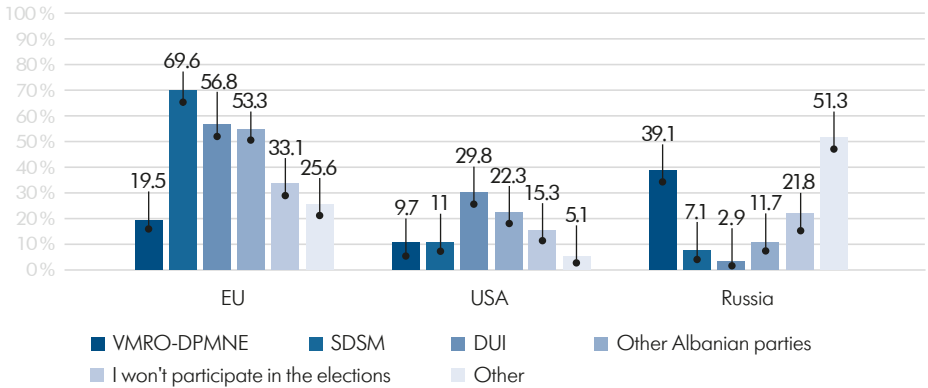
the Macedonian government and people,<sup>3</sup> in contrast to the EU which warmly welcomed the name change and shortly after failed to deliver the promised start of accession negotiations. This perception of valuable alliance with Russia reflects the possible orientation towards the Eurasian Union among that same group.

On the other side of the chart, the electorate of SDSM is very clearly drawn to the EU (69.6%) as is the electorate of DUI (56.8%) and "other Albanian parties" (53.3%). Only DUI voters, and to a lesser extent the electorate of other Albanian parties, still consider the US a valuable partner by a significant amount. Even if proportions shift slightly, majorities in the response to all external actor's questions remain unchanged no matter whether asked for former or future voting behaviour.

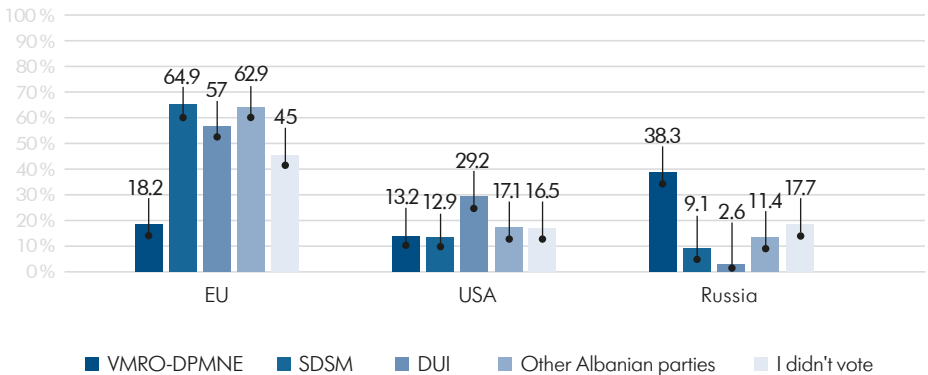
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<sup>3</sup> For an official statement of the Ministry of Foreign Affairs on the result of the referendum on Prespa Agreement visit: [https://www.mid.ru/en/foreign\\_policy/news/-/asset\\_publisher/ckNonkJE02Bw/content/id/3363368](https://www.mid.ru/en/foreign_policy/news/-/asset_publisher/ckNonkJE02Bw/content/id/3363368), пристапено во февруари, 2020 година.

**Chart 7.2.** According to you, who would be North Macedonia's greatest ally? (if parliamentary elections take place tomorrow, which political party are you going to cast your vote for?)



**Chart 7.3.** According to you, who would be North Macedonia's greatest ally? (which political party did you cast your vote for?)

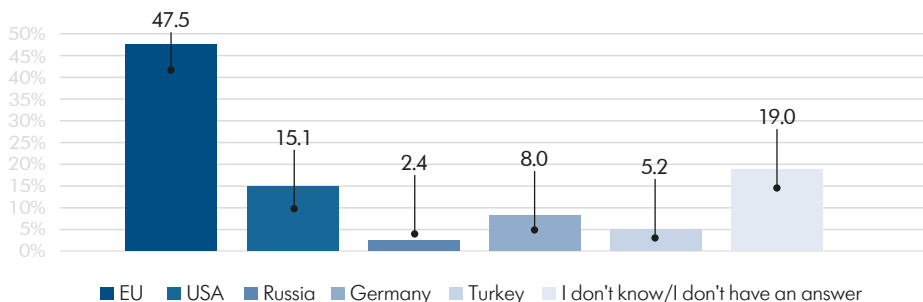


## 6. Who brings in the cash? North Macedonia's biggest donor

Continuing the trend from the years before, the EU is considered the greatest donor by far, yet has slightly lost recognition among respondents from 47% in 2018 to 44.8% in 2019. Proportions of other foreign donors have shown a slow trend of approximation

with the US growing to 20.6% (from 15.1% in 2018), Russia growing to 3.7%, Germany increasing by 3% to a value of 10.8%, and Turkey remaining stable. The number of respondents without an answer has dropped by 6% to 12.2%.

**Chart 8.** Who's the greatest donor (provides money for development) in North Macedonia?





## 7. Valuable Euros: Recognition of EU investments

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The last series of questions asks respondents about the amount of money allocated to North Macedonia from the European Union. Between 2014 and 2020, the EU has budgeted 664.2 million Euros for the country to be invested in different priority areas throughout different regions in North Macedonia. It is difficult to split this into a yearly amount allocated to the country since many investments run over a period of several years, yet for the purpose of this question one could argue that the country receives on average more than >100 million Euros per year.

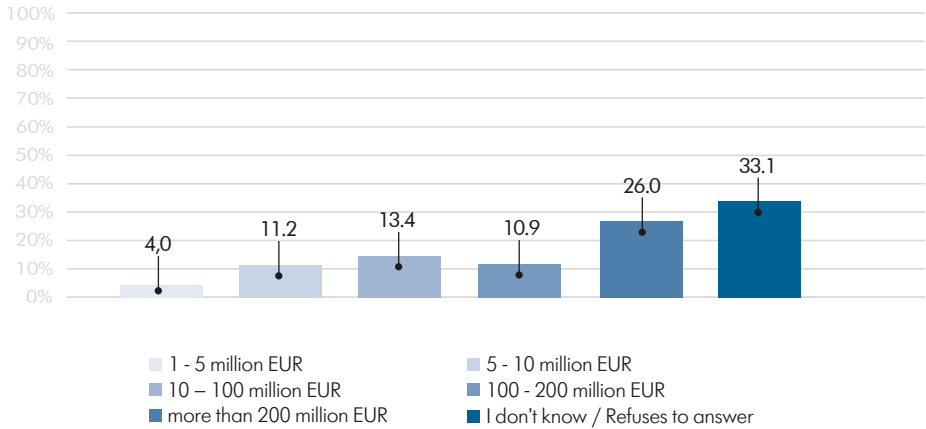
The high amount of investments from the European Union is recognized by respondents, of which one fourth has chosen the highest possible amount. Following the trend of the former year, even

less respondents choose “I don’t know” (or refuse to answer) as an option. The three-year trend shows that the number of uncertain respondents has dropped by over 35% in comparison to the results before. This suggests that respondents feel increasingly better informed about the activities and investments and, even more, are aware of the efforts of the EU in the country. Drawing the line to complementary research from the Macedonian Think Tank Centre for European Strategies - EUROTHINK, the appreciation of the EU’s investment in the country is also represented in the 2019 Eurobarometer Opinion Poll in growing consent with the statement that “Macedonia’s membership in the EU would be a useful thing” (in comparison to being a “good” thing).<sup>4</sup>

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<sup>4</sup> Eurobarometer fall 2019. Eurothink – Centre for European Strategies.

**Chart 9.** According to you, how much money does the EU give North Macedonia annually?



## Conclusion

The lack of clear, distinctive results from this analysis is symptomatic for the current state of EU affairs in North Macedonia: On the one hand, EU's recognition as a donor and a partner has increased further; on the other hand, citizens are disillusioned about their

prospect of timely EU membership and it seems to be regarded as everyone's fault at once: North Macedonia, because it fails to reform; the EU, because it's busy with internal struggles, and France, because Macron serves a face for the decisive "no" in the European Council.

It is certainly important to note that respondents become increasingly more aware of the sum invested by the EU in the country, which is also reflected in the growing rates on the perception of the EU as the strongest ally and as the most influential foreign factor. At the same time, the EU undeniably loses credibility by the year.

The future of North Macedonia is unpredictable at this point and, with the hope in the EU as a saviour scratched, certain parts of the society flirt with alternative ideas. It is not a new occurrence that the electorate of the VMRO-DPMNE party is more drawn towards Russian partnership in comparison to other groups in the country. Yet, this year's edition has been the first one to offer the Eurasian Union as an alternative to the European Union to participants of this survey, and that one fourth of respondents consider this an option should be eye-opening. The example of Serbia's trade deal with the Eurasian Union has shown that this could potentially be a real competitor to the EU and it is not certain whether the EU

is aware and prepared of this. VMRO-DPMNE's ogling at Russia is also only one visible trend: more striking seems the recognition of Russia as a valuable partner among non-voters and the growing support from ethnic Albanians.

All in all, the 2019 IDSCS Public Opinion Poll feeds evidence to growing polarization and sense of limbo in the context of EU integration in North Macedonia, which does not come as a surprise considering the to and fro on the side of the European Union and the non-rewarding of the tremendous effort the Government has gone through to comply with the interest of all veto players in the European Council.

## Information about KAS

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

The KAS is a political foundation, closely associated with the Christian Democratic Union (CDU) of Germany. We conduct education programs for the society and cooperate with governmental institutions, political parties, civil society organizations and handpicked elites, building strong partnerships along the way. Together with our partners, we make a contribution to the creation of an international order that enables every country to develop in freedom and under its own responsibility.

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## Information about IDSCS

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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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# Link

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# What now? The uncertainty of North Macedonia's EU accession in 2019

Authors: Ivan Nikolovski  
and Marie Jelenka Kirchner

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