



Analysis of public opinion on North Macedonia's accession to the European Union (2014-2025)

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December 2025



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Impressum

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Publisher: Wilfried Martens Centre for European Studies
Konrad Adenauer Foundation (KAS) in the Republic of North Macedonia
Institute for Democracy "Societas Civilis" – Skopje

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Design: Matea Londza Shumkovska

This publication is available at:

<http://www.martenscentre.eu>
<http://www.kas.de/nordmazedonien>
<https://idscs.org.mk/en/>

Summary of results

- 71% of the population is in favor of EU membership, almost 10% more compared to the previous year
- Eurosceptic attitudes have risen to 14% of the population
- The number of undecided and apathetic respondents has significantly decreased over the past year
- The long-lasting disparity in support for EU membership between the two largest ethnic groups, the ethnic Macedonians and ethnic Albanians, has narrowed
- The gap has been reduced primarily due to a significant shift in the positive attitudes on EU membership among ethnic Macedonian respondents.
- 71% of the ethnic Macedonians are in favor of their country's bid for EU membership, an increase of 15% compared to the previous year.
- Respondents from other minority ethnic groups in North Macedonia appear to be slightly more Eurosceptic - more than 20% within this group are opposing EU membership.
- Educational achievement continues to be the most stable positive determinant of support for EU membership
- A notable change in attitudes is observed among the youngest segment of the population, where growing support for EU membership has been evident over the past two years
- The oldest segment of the population (55+ years) remains the most Eurosceptic
- EU membership remains important for roughly 70 % of the population
- For almost a third of respondents EU membership carries little or no importance

- 40% of the population believes that the country is ready to become a member state
- Slightly above 60% of the population believes that the country has achieved progress in the accession process over the past year
- 46% of the population thinks that the obstructions from the neighbouring countries are the biggest impediment to North Macedonia's EU accession progress
- External factors, rather than domestic issues, are viewed as the main reasons for the slowdown in the country's EU accession process
- The number of respondents who believe that the country will become a member of the EU in the next 3 to 5 years has increased to 30% in 2025
- A relatively high portion of the population (19%) remains pessimistic about North Macedonia's prospects for EU membership
- Economic expectations continue to be the main determinants for the support of EU membership
- Expectations of improvements in the standard of living in the country are the most frequent factor of support for EU membership
- Non-materialist expectations, such as democratic reforms and stability, have become more prominent in recent years
- 60% of respondents believe that EU membership would not stop the trend of emigration of young Macedonians/citizens of Republic of North Macedonia
- Perceptions of cultural threats and other identity-based factors are fundamental for the formation of Eurosceptic sentiments among the Macedonian public
- The number of respondents who identify with both an ethnic and European identity has increased to almost a third of the population

- There is a notable increase in the number of ethnic Albanians who self-identify as Albanian and European
- 85% of SDSM sympathizers support North Macedonia's EU membership, 11 percentage points lower than in 2024
- EU membership support among VMRO-DPMNE sympathizers has grown rapidly in the past two years
- 70% of VMRO-DPMNE sympathizers support North Macedonia's EU membership

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 databases 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 EU Accession Process of North Macedonia which are addressed in every annual survey, and whose measurement is obtained by utilization of identical batteries of survey questions. The same data base is used for comparative analysis in this joint publication of the Konrad Adenauer Foundation and Wilfried Martens Centre for European Studies, funded by the European Parliament.

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, and presented in a separate publication.

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 EU Accession Process of North Macedonia 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 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.

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

About the survey

This public opinion analysis on the EU accession process of North Macedonia conducted in 2025 is a continuation of the research done in the period 2014-2024. 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 public opinion survey research conducted in the period between October 22 and November 5, 2025 on a sample of 1003 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 percentages and are subject to a statistical error of $\pm 3\%$.

This research uses the same methodology and questionnaire as the surveys conducted in previous years. This approach creates conditions for a longitudinal analysis of the support for North Macedonia's accession to the European Union over the past ten years. In addition, the questionnaire for the last three editions of the research has been slightly updated with the introduction of one completely new question and amendments to some of the existing variables. 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 2014-2025.

General trends

Public support for EU membership in North Macedonia has been gradually declining over the past decade, largely due to the low credibility of the country's accession prospects. The initial setback came from the Greek blockade tied to the long-standing name dispute. Although the 2019 Prespa Agreement resolved this issue and briefly renewed optimism, momentum faded again when Bulgaria blocked the start of the accession negotiations in 2020 over a bilateral dispute involving sensitive issues of identity, history, and language.

The stalemate was temporarily eased in 2022 when the Government of North Macedonia accepted the EU-backed "French proposal" requiring, among other conditions, recognition of a Bulgarian minority in the Constitution. This enabled the launch of the screening process and formal negotiations, but further progress stalled because Parliament lacked the votes to enact the required constitutional amendments.

Following the May 2024 elections, VMRO-DPMNE formed a coalition government with VLEN. While committed to EU integration, the new government refused to proceed with the constitutional amendments without firm assurances that Bulgaria would not introduce new obstacles. At the same time, the EU adopted the Growth Plan for the Western Balkans, and in October 2024 the European Commission approved North Macedonia's Reform Agenda, opening the way for initial financial support. Since then, and throughout 2025, the accession process in North Macedonia remained static, with no significant developments in the political positioning of the government in regard to the constitutional changes and the prospects of unlocking the current impasse.

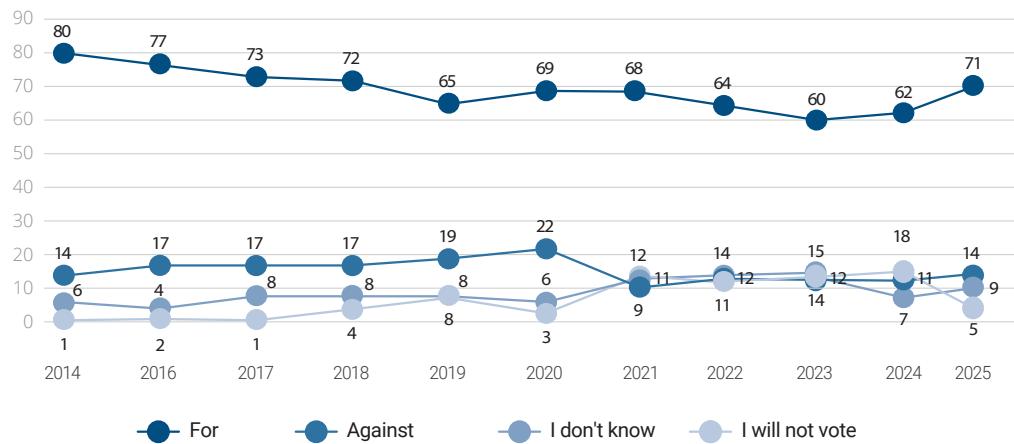
Finally, in October 2025, local elections were held in the country, resulting in a resounding win for the VMRO-VLEN coalition. This renewed legitimacy of the governing political elites may open a window of opportunity for more substantial political and diplomatic engagement aimed at resolving the blockade and advancing accession negotiations. At the same time, the credibility of EU's enlargement policy has grown, supported by significant progress in the accession process of several candidate countries. Most notably, two Western Balkan candidates, Montenegro and Albania, have achieved breakthroughs in the accession negotiations by opening all negotiating clusters and receiving highly positive assessments from the EU and its member states. These regional developments could potentially have positive spillover effects on public sentiments towards EU membership in the Macedonian society.

The 2025 results on the general support for EU membership indicate a significant shift in public opinion. The slight uptick in support observed in 2024, has progressed into a significant rise in the support for EU membership. 71% of the population is in favor of EU membership, almost 10% more compared to the previous year (graph 1). At the same time, Eurosceptic attitudes have risen slightly, as 14% of the respondents oppose the idea of North Macedonia's membership in the EU, 3% more than in 2024. Both trends come as a consequence of a significant transformation of attitudes among the cohort of undecided and apathetic respondents. While in the previous year, this segment of the population comprised a quarter of respondents, its share dropped by more than 10% in 2025.

These shifts are also reflected in the demographic breakdown of results. Most notably, there is a reduction in the long-lasting disparity in support for EU membership between the two largest ethnic groups in North Macedonia, the ethnic Macedonians and ethnic Albanians. The ethnic Albanians have been continuously expressing massive support for North Macedonia's EU membership aspiration. This support is maintained in 2025 as well, as 76% of respondents belonging to this group have expressed their support. However, these figures are lower by 8% compared to the previous year. On the other hand, the inter-ethnic gap has narrowed primarily due to a significant shift in the attitudes of ethnic Macedonian respondents. In 2025, 71% of the ethnic Macedonians are in favor of their country's bid for EU membership, an increase of 15% compared to the previous year. This change is proportional to the decrease in the percentage of apathetic and undecided ethnic Macedonians, dropping from nearly a third in 2024, to 15% in 2025. Respondents from other minority ethnic groups in North Macedonia appear to be more Eurosceptic, with more than 20% of this cohort are opposing EU membership.

Educational achievement continues to be the most stable positive determinant of support for EU membership, as support increases with higher levels of education. A notable change in attitudes is observed among the youngest segment of the population. While in the past this cohort has been much less enthusiastic about the prospects of EU membership, a trend of growing support for EU membership is observable in the past two years. In 2025, 80% of respondents aged 18-24 expressed support for EU membership. At the same time, the share of apathetic and undecided respondents within this group has been cut in half, from 30% in the previous year to 14% in 2025. By contrast, the oldest segments of the population (55+ years) remain the most Eurosceptic, with more than 20% of respondents in this group opposing EU membership.

Graph 1 . ³ If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



Regarding how personally important respondents consider EU membership, there have been no significant changes in public sentiment over the past two years. EU membership remains important for roughly 70% of the population. EU membership is of highest importance for 37% of the population, while almost an equal share of the population attaches some importance to EU membership. For almost a third of respondents, EU membership carries little or no importance, roughly the same as in the previous year. The distribution of results across the demographic categories is very similar to the distribution in the previous question. Educational achievement and income are obvious predictors of the perceived importance of EU membership, as the wealthier and more educated segments of the population are more likely to attach high levels of importance to the notion of EU membership. For a relatively high percentage (slightly more than 20%) of the oldest cohort of the population (55+ years), EU membership is not important at all. In contrast to the long-lasting trend of inter-ethnic disparity, the data from 2025 point towards a significant narrowing of the gap in perceptions between the ethnic Macedonians and the ethnic Albanians. In both groups EU membership is important for roughly 70% of respondents.

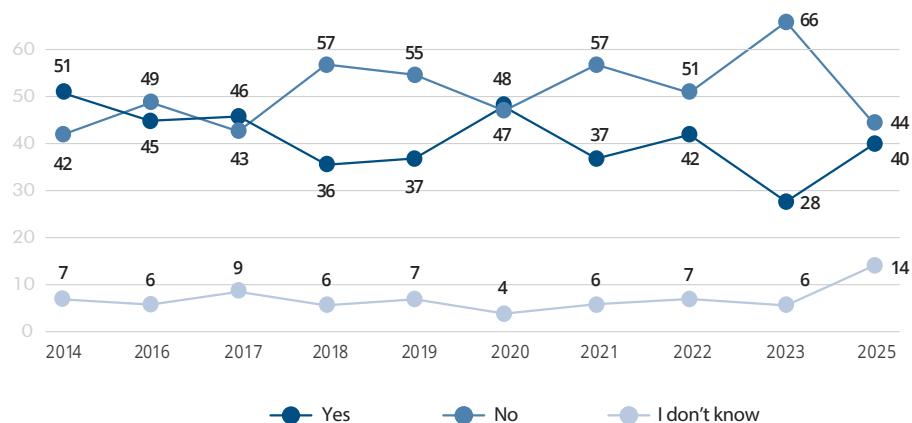
³ As the decimal numbers were rounded off, the total may not be 100% (this remark applies to all graphs and tables).

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 %	2021 %	2022 %	2023 %	2024 %	2025 %
Highly important	48	48	54	56	36	36	51	54	39	35	37
Somewhat important	36	29	20	24	35	34	26	21	34	33	34
Somewhat unimportant	5	5	6	5	10	13	5	7	6	14	11
Not important at all	10	16	18	14	18	16	16	16	19	15	16
I do not know	1	1	1,5	1	1	1	2	2	1	2	2
No answer / refuses to answer	0	0	0	0	0	0	0	0	0	1	0

Significant longitudinal inconsistencies can be observed in relation to the citizens' evaluation of the country's readiness to join the EU. While in 2023 more than 60% of the population shared the opinion that North Macedonia was not ready for EU membership, two years later this percentage had dropped to 44% (graph 2). Concurrently, 40% of the population believes that the country is ready to become a member state. These shifts occur in a period of relative stagnation in the accession process without significant developments in accession-related reforms to warrant such a variation in public opinion. The data further solidifies the argument that the population is not well-informed on the functioning of the accession process, while also demonstrating information deficits regarding the EU's assessment of North Macedonia's progress in the accession process.

Graph 2. Do you believe that North Macedonia is ready for EU membership?



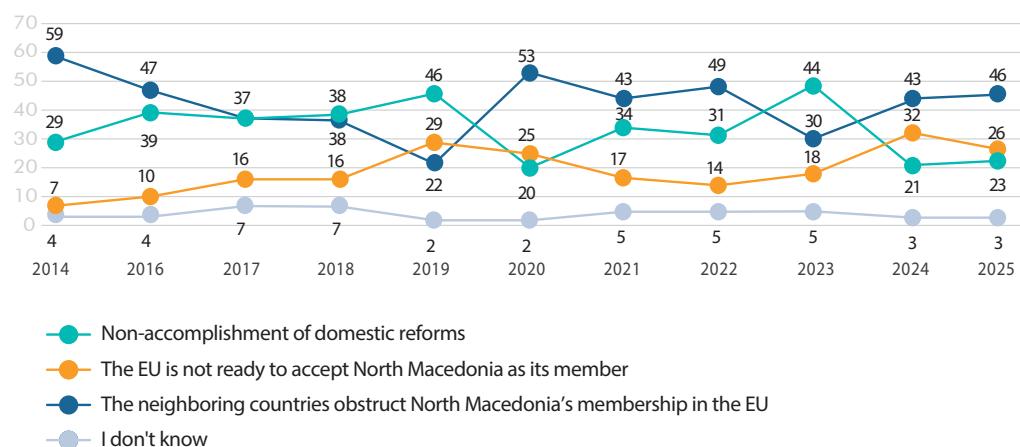
Notable changes are also observable in the distribution of citizens' evaluations regarding the country's EU accession progress in 2025. In comparison to 2024 when for the first time less than half of the population had been convinced that there had been at least some progress in the accession process, in 2025 the population shares a more positive outlook (table 2). Specifically, the cumulative percent of respondents who detect progress in the accession process is slightly above 60% with support increasing across all three positive categories compared to the previous year. On the other hand, more than a third of the population has perceived no progress at all or backsliding in the reform process. Unlike previous years, the distribution of results among the country's two largest ethnic groups (Macedonians and Albanians) is now very similar. The oldest segment of the population (55+ years) is a notable outlier, being considerably more pessimistic than other age groups, with close to 40% of respondents declaring either no progress at all or regression in the accession process.

Table 2

Regarding this year (2025), how much has North Macedonia progressed in the EU integration process?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %	2025 %
It has progressed a lot	14	11	13	13	11	10	11	10	6	4	8
It has somewhat progressed	33	28	31	25	27	38	27	23	22	18	25
It has progressed a little	20	20	20	28	23	27	21	20	24	25	29
There was no progress at all	26	30	27	30	33	20	33	30	35	34	27
It has regressed	5	7	2	2	5	5	4	13	10	11	7
I do not know	2	3	7	2	1	1	3	3	2	8	4
No answer / refuses to answer	0	1	1	1	0	0	1	1	0	1	1

Perceptions of the principal impediments to North Macedonia's membership perspectives have been relatively inconsistent over the past decade. However, in the past three years, more stable patterns of attitudes have emerged, primarily driven by the bilateral dispute with Bulgaria and its impact on the lack of progress in the accession process. Therefore, the perception that the country is not progressing in the accession process due to obstacles from the neighboring member state(s) predominant in the Macedonian society. In 2025, 46% of the respondents share this sentiment (graph 3). 23% believe that the reasons for the inability of the country to obtain membership are to be found domestically by identifying lack of domestic reforms as the key factor. On the other hand, fewer people are blaming the EU and its unwillingness to accept new EU members as the main obstacle to membership. Although this group constitutes 26% of the population, the numbers are down by 6% when compared to the previous year. This trend is most probably a reflection of the increased credibility of EU's enlargement policy in the region as evidenced by the recent progress in the accession process by Montenegro and Albania. Unlike the previous questions in the survey, there is a more vivid gap in the perceptions of the ethnic Macedonians and Albanians regarding the principal impediments to North Macedonia's EU membership. Roughly a third of the ethnic Albanians in the country point toward the lack of domestic reforms as the main reason why the country is not an EU member, 10 percentage points more than the ethnic Macedonians. Conversely, almost half of ethnic Macedonians put the blame on the obstacles from the neighboring EU member states, 13 percentage points more than their Albanian counterparts.

Graph 3. ⁴ In your opinion, what is the main reason why North Macedonia is still not a member of the EU?



⁴ 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 3%

The assumption that the reinvigorated EU enlargement policy and the encouraging examples in the neighborhood could have positive effects on public perceptions on the EU accession prospects in North Macedonia is the most probable explanation for the relatively significant shifts of public opinion in regard to expectations when the country will become a member of the EU. Accordingly, the number of respondents who believe that the country will become a member of the EU in the next 3 to 5 years has increased to 30% in 2025, which is double the percentage recorded in 2024 (table 3). However, the majority of the population still perceives the prospects for EU membership on a long-term basis. Hence, 28% of respondents believe that the country will join the EU within the next 10 years, while 17% see the realization of this goal within the next 20 years. A relatively high portion of the population (19%) remains pessimistic about North Macedonia's prospects for EU membership. Although the largest proportion of respondents within this group is comprised of ethnic Macedonians, the percentage of pessimistic respondents in the ethnic Macedonian cohort has been constantly decreasing over the last three years, from 37% in 2023, down to 24% in 2025.

Table 3

When do you think North Macedonia will become a member of the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %	2025 %
In the next 3 years	14	18	27	23	14	20	18	11	8	5	10
In the next 5 years	18	22	22	25	20	28	16	16	13	12	20
In the next 10 years	21	18	12	17	21	25	18	21	31	28	28
In the next 20 years	12	7	7	14	16	9	11	15	11	17	17
Never	23	25	20	17	24	15	29	32	30	26	19
I do not know / refuses to answer	11	10	11	5	4	3	8	6	7	11	6

DETERMINANTS OF SUPPORT FOR THE EUROPEAN INTEGRATION PROCESS

Rationalist-utilitarian factors

Previous public opinion research on the determinants of support for European integration in North Macedonia has established a firm correlation between rationalist-utilitarian factors and positive attitudes towards EU membership. In sum, the supporters of the country's bid for membership into the EU, form their opinions on this topic on the basis of their expectations of material gain as a result of the successful accession process and subsequent financial returns from membership. A more detailed analysis of the data additionally indicates that these declarations of support are more of a sociotropic, rather than egoistic nature. This means that the population that is supportive of North Macedonia's aspirations for EU membership is invested in the process because the respondents anticipate future material gains that will benefit the Macedonian society as a whole and not necessarily themselves personally.

The utilitarian logic continues to be the driving force behind the support for EU membership in 2025. Expectations of improvements in the standard of living in the country are still the most frequent factor of support for EU membership, although the proportion of 22% of respondents that favor this factor has dropped by more than 10% in comparison to the previous year (table 4). In addition, the materialist-utilitarian assumption is further consolidated when the other variables that are based on this reasoning are taken into consideration. Thus, an additional 15% of the population supports North Macedonia's EU membership due to expectations of reduced unemployment, while 17% base their decision on the idea that EU membership will provide easier access to jobs abroad. Therefore, the cumulative percent of respondents who base their support for EU membership on economic expectations is above 50%. On the other hand, non-materialist expectations have become more prominent in recent years. Support is increasingly being based on variables such as anticipation of improved security and stability of the country (20%) and a sense of belonging to "the European family of countries" (14%).

Table 4

What is your reason for deciding to vote for membership in the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %	2025 %
Improvement of the standard of living	29	46	51	36	22	21	23	23	25	35	22
Reduction of unemployment	26	17	23	22	18	19	16	18	14	13	15
Improvement of democracy	10	5	7	9	13	13	14	12	13	10	11
Mobility of workers/ easier access to jobs abroad	3	10	5	6	15	16	14	15	15	10	17
A sense of belonging to "the European family of countries"	2	5	2	4	13	13	12	11	14	13	14
Improved security and stability of the country	27	16	12	23	19	19	20	20	19	18	21
I do not know / refuses to answer	2	1	1	1	0	0	0	1	0	0	0

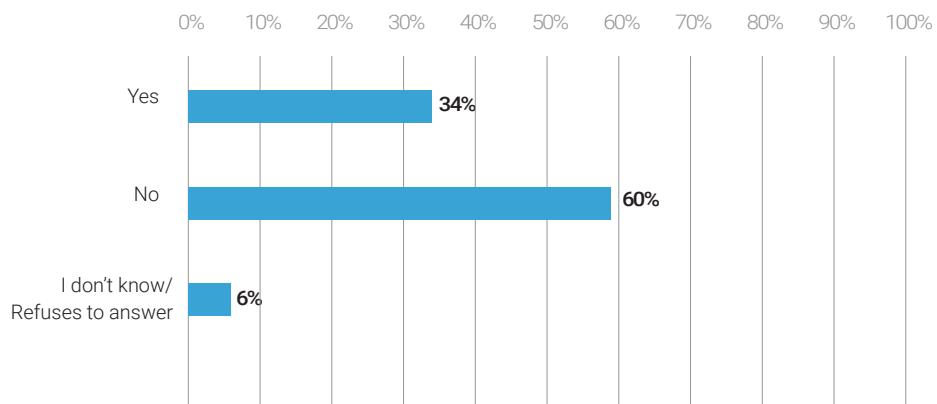
Economic utilitarian reasoning is also dominant when respondents are asked to highlight the areas that would be most positively affected by North Macedonia's membership in the EU. Economic development (22%), quality of life (19%), reduced unemployment (14%), and infrastructural improvement (13%) are continuously pointed to as the segments of society that would principally experience positive change as a consequence of EU accession. On the other spectrum, only 10% of the population sees EU integration as a factor of positive change for human rights policies in the country. Additionally, 14% highlight stability as the most prominent positive effect of the accession process. This distribution of attitudes is consistent across all demographic categories.

Table 5

Which area will be most positively affected by North Macedonia's membership in the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %	2025 %
Economic development	23	25	25	20	18	19	19	21	18	27	22
Stability	13	15	15	13	14	12	13	17	12	16	14
Reduction of unemployment	23	18	21	19	20	21	15	17	14	13	14
Human rights and freedoms	12	9	12	14	12	11	12	12	12	9	11
Improvement of infrastructure	6	5	5	9	11	13	11	9	13	8	13
Quality of life as a whole	16	18	11	13	17	16	15	18	19	18	19
Strengthening of national identity	3	4	4	7	3	5	9	6	7	2	4
Other	1	3	2	1	2	2	3	0	2	0	1
I do not know	3	3	6	3	3	1	2	0	4	5	2

Finally, we measure the perceived effects of EU membership on youth emigration from North Macedonia (presumably) to other more developed EU member states. A significant majority of 60% of respondents share the opinion that EU membership would not stop the trend of emigration of young Macedonians/citizens of North Macedonia abroad (graph 4). 34% of the population believes that EU membership will serve as a preventive factor for youth emigration. This ratio of perceptions is almost identical to the breakdown of attitudes within the youngest demographic of respondents (aged 18-24). Ethnic Albanian respondents are more evenly split in their perceptions, as 40% within this group believe that EU membership will reduce youth immigration, while half (50%) are convinced of the opposite. Ethnic Macedonians appear more pessimistic, as 63% of this demographic do not think that the process of EU integration will be able to offset the negative trends in youth immigration.

Graph 4. Do you think that EU membership will reduce the process of emigration of young people from the country?

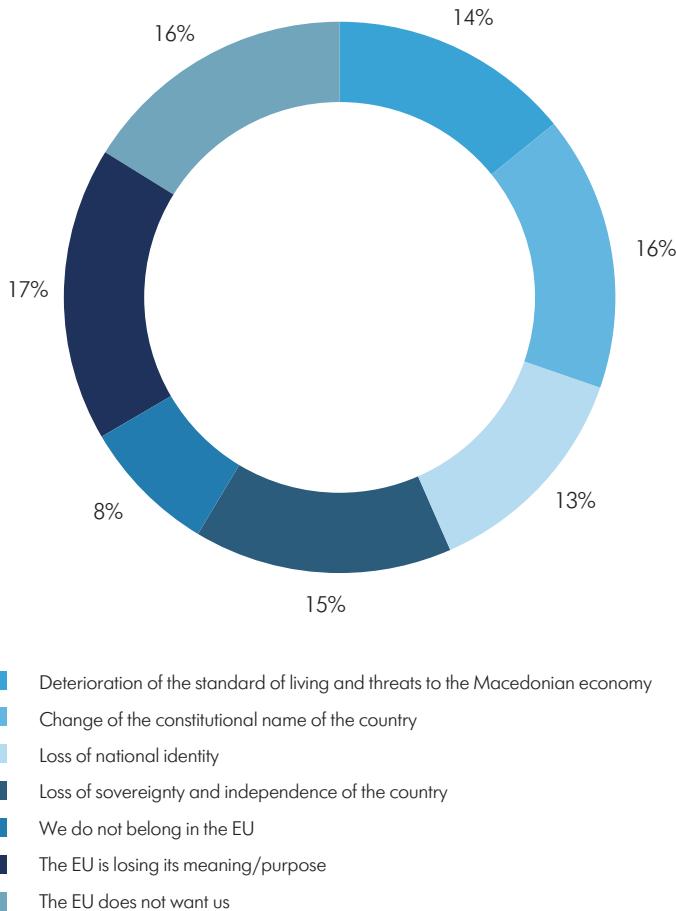


Identity and value-based factors

As utilitarian factors have long been recognized as the main drivers of support for EU membership in North Macedonia, at the same time there has been a growing prominence of identity and value-based concerns as key factors shaping Eurosceptic attitudes. Over time, perceptions of cultural threats linked to the supranational nature of European integration, as well as fears of sovereignty erosion resulting from the accession process, have increasingly emerged as significant predictors of opposition to EU membership. These identity and value-based concerns are now central to the formation of Eurosceptic sentiment in the Macedonian society.

This argument is firmly confirmed by the results of the 2025 survey. Within the cohort of Eurosceptic respondents, only 14% base their opposition to EU membership on the fear that it would worsen the economy and the living standard in the country. In contrast, perceptions of cultural threats and other identity-based factors are fundamental in the attitude formation of a vast majority of the Eurosceptic population. For example, 15% of Eurosceptic respondents fear that EU membership will undermine the sovereignty and independence of the country. An additional 13 % perceive EU membership as a threat to national identity, while 16% within the Eurosceptic cohort still hold grievances over the changing of the constitutional name in 2019 as a result of the Prespa agreement. 16% of this population are of the opinion that the EU does not want North Macedonia to become a member state, while almost the same proportion believes that the EU is losing its purpose.

Graph 5. What is the reason for your vote against EU membership?



In 2025, a notable shift in citizens' self-perception of identity is observable. While in the previous three-year period more than 70% of the population have declared belonging to an exclusive (ethnic) identity, this sentiment has been significantly reduced to 58% in 2025 (table 6). Conversely, the number of respondents who develop a dual, ethnic and European identity has increased to almost a third of the population. The number of citizens who emphasize their European identity over their ethnic/national identity has also (very modestly) increased. The demographic breakdown implies that this change in self-perception is related to a notable increase in the number of ethnic Albanians who self-identify as Albanian and European (roughly 40%). Within the ethnic Macedonian cohort, almost 70% of respondents perceive themselves through the lens of an exclusive (only Macedonian) identity.

Table 6

Above all, do you feel as	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %	2025 %
Only ethnic Macedonian/ethnic Albanian/other	69	70	77	69	67	78	60	77	71	73	58
Ethnic Macedonian/ethnic Albanian/other and European	20	20	15	20	24	14	25	13	20	21	30
European and ethnic Macedonian/ ethnic Albanian/other	6	7	3	4	7	7	10	3	3	4	7
Only European	3	3	3	5	1	1	2	3	4	1	2
I do not know	2	1	2	1	1	0	3	3	2	1	3

The 2025 survey data align closely with the broader longitudinal patterns, reinforcing the view that there is no strong link between exclusive ethno-national identity and Euroscepticism in North Macedonia. Attitudes within this demographic largely mirror the general trend shown in graph 1. As anticipated, almost 80% of respondents who identify with both an ethnic and a European identity are strongly supportive of North Macedonia's EU membership ambitions.

Cues from political parties

Finally, we measure the impact of cues from political parties as factors of attitude formation regarding the European integration process in North Macedonia. The role of party cues as predictors of public opinion is based on the hypothesis that, due to informational deficits on complex political processes like the process of European integration, sympathizers of political parties pick up cues from their respective party leaderships when they form opinions on issues related to those processes. Our longitudinal analyses of the correlation between opinions of party sympathizers and official positions of the respective parties generally confirm the party cue hypothesis.

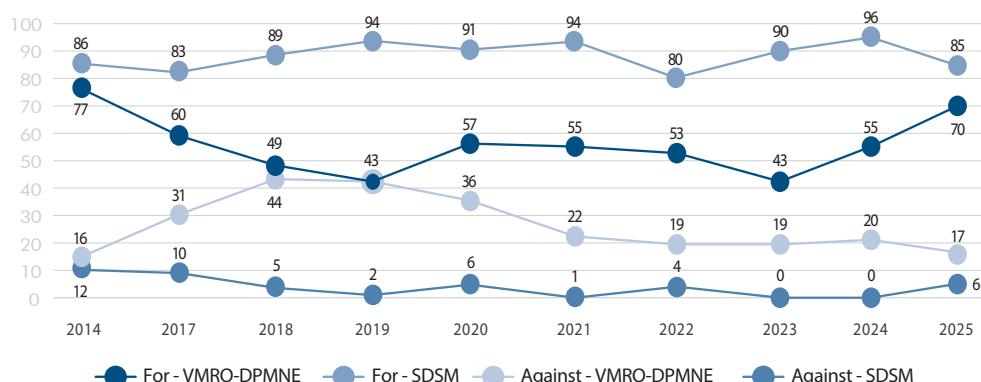
Throughout the period of time that is covered in this analysis, virtually all relevant political parties in North Macedonia have officially supported the country's aspirations for European integration and EU membership. However, despite the general party consensus, there have been significant differences between the major political parties on a number of instances related to the accession process and some aspects of EU's political conditionality within that process.

Most notably, the two major political parties demonstrate divergent positions regarding the constitutional changes as the principal stumbling block for the continuation of the accession negotiations. SDSM, the primary opposition party, has maintained European integration as its top political priority and has supported full compliance with the negotiation framework, viewing the constitutional amendments as necessary for continuing the accession negotiations. Meanwhile, VMRO-DPMNE, which has been in power for more than a year and a half, continues its strong support for EU membership but has refused to endorse the constitutional changes. The party leadership insists on explicit assurances from the EU that no further identity-based conditions or bilateral disputes (such as those involving Bulgaria) will impede the accession process.

Having this in mind, it can be assumed that by picking up cues from their respective party leadership, the respondents who are SDSM sympathizers would be more supportive of the accession process when compared to the supporters of VMRO-DPMNE due to the reluctance of the party to comply with some of the political conditions imposed by the EU. In a general sense, this assumption is also confirmed in 2025. A very high number of 85% of SDSM sympathizers support North Macedonia's EU membership, which is 15 percentage points more when compared to the cohort of VMRO-DPMNE supporters. However, there are significant changes in the distribution of attitudes in 2025

when compared to the previous years. First, there is a significant drop in the percentage of SDSM supporters who fully endorse EU membership. Although the number is still very high, it is 11 percentage points lower than in 2024, when EU membership support peaked at 96%. A reverse trend is observable in the public perceptions within the group of VMRO-DPMNE sympathizers. Since 2023, when support for EU membership among this group has been at its lowest at 43%, there has been a rapid growth of the proportion of VMRO-DPMNE sympathizers who are positive about the country's EU membership aspirations. In two years, the support has grown by almost 30%, up to 70% in 2025. This interval aligns with the period in which the party has been in power, while also reflecting the increased credibility of the EU's enlargement perspectives in the region. The significant increase in support within this cohort primarily reflects the notable reduction (by 12 percentage points) of the proportion of undecided and apathetic respondents, as the percentage of Eurosceptic sympathizers has decreased by only 3 percentage points, from 20% in 2024 to 17% in 2025.

Graph 6 . ⁵ If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



However, the convergence of positive attitudes towards EU membership between the sympathizers of the two major political parties in North Macedonia is not reflected across all variables in the survey. On the contrary, party cues have had a profound effect on the opposing opinions between supporters of the two parties in regard to the progress achieved in the EU accession over the past year. The ruling vs. opposition party dynamic continues to produce a substantial split, mirroring the pattern observed in the preceding years. For example, 75% of VMRO-DPMNE sympathizers believe that there has been at least some progress in the accession process in 2025. In contrast, nearly half of the supporters of SDSM have detected no progress at all or consider that the country has regressed in the accession process.

⁵ The analysis takes into consideration only the data for the two largest parties in the country VMRO-DPMNE and SDSM. The data for the other parties has been omitted due to the small sample size. The values that refer to the answers *I do not know* and *I will not vote* have not been included in the graph.

Information about KAS

Freedom, justice, and solidarity are the basic principles underlying the work of the Konrad Adenauer Foundation (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 WMCES

The Wilfried Martens Centre for European Studies (WMCES) is the official think tank of the European People's Party (EPP). Through its work, WMCES inspires ideas for action and shape responses to European challenges. As a political think tank, it is a full part of the European policy-making ecosystem. Centre's mission is to offer decision makers and opinion leaders assistance in formulating new and effective policy options.

These will help the European Union become a strong global player, a reliable transatlantic ally and a better democracy promoter.

Information about IDSCS

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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