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From a poster to a foster child.
2021 public opinion analysis on North
Macedonia's EU accession process

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*The views expressed in this document do not necessarily reflect the views
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Introduction

Since 2016, the Institute for Democracy (IDSCS) and Konrad-Adenauer-Foundation (KAS) conduct a nationwide, representative opinion poll on questions relevant to the EU integration process of North Macedonia. While there is consistency in the questionnaire when it comes to certain questions, each year, IDSCS and KAS add new questions related to specific political events. This year is no exception. This edition specifically looks at citizens' perception about the dynamics of the ongoing Bulgaria-North Macedonia dispute, the Open Balkans initiative, and the so-called Covid19 diplomacy. Thus, the data allows us to conduct comparative analyses of trends in the public opinion, while also looking at the general attitude on the most pressing issue in the year

at stake. To get a deeper understanding of the survey results, each question is controlled, among other parameters, for political orientation/ partisanship and ethnic background of respondents. The findings of the analysis are summarized in four categories 1) *Bulgaria's demands for unblocking North Macedonia's EU accession process* 2) *the external influences in and preferred alliances of the country* 3) *the nature of the regional cooperation in the Western Balkans* 4) *economic aid, especially in the context of the COVID-19 pandemic.*

The 2021 survey was conducted by telephone interviews during November, on a national representative sample of 1000 respondents, with a marginal error of $\pm 3.1\%$.

1. Overview of the current political affairs

After North Macedonia signed the Prespa Agreement, subsequently changed its constitutional name in early 2019, and agreed to adhere the France-sponsored new enlargement methodology, in March 2020, the EU Council decided to open the long-awaited accession negotiations. And just as the first intergovernmental conference was about to take place, in November 2020, Bulgaria blocked the adoption of the negotiation framework over issues of identity and history. Regrettably, 2021 did not see any advancements in the dialogue between North Macedonia and Bulgaria. On the contrary, the latter posed additional requirements, inter alia, the status of the Bulgarian minority in North Macedonia. Three EU presidencies have passed (German, Portuguese and Slovenian) without substantive outcome that would

have resulted in lifting the veto. On top of that, after the resignation of its former prime minister Boyko Borissov, Bulgaria did not manage to form a government for three consecutive elections.¹ Finally, in December 2021, a new government in Sofia was formed. The newly elected Prime Minister Kiril Petkov expressed readiness to lift the veto and publicly announced the demands for lifting the veto with a six months fast-track for resolving the issues with North Macedonia.²

But Bulgaria's veto was not the only hot topic in North Macedonia. In response to the stalemate in the accession negotiations, the country turned towards increased regional cooperation. This trilateral, for the time-being, initiative gathers the governments of Albania, North Macedonia and Serbia and wants to promote an EU-like single market in the Western Balkans where free movement of goods, services, and people is guaranteed. Open Balkans, as it called following the name change from Mini-Schengen, aims to show that

¹ Nikolov, K. (2021), Political crisis in Bulgaria to lead to third parliamentary elections this year, accessed on 8 February 2022 https://www.euractiv.com/section/politics/short_news/political-crisis-in-bulgaria-to-lead-to-third-parliamentary-elections-this-year/

² Testorides, K. (2021), Associated Press, Bulgarian PM visits North Macedonia to boost battered ties, accessed on 8 February 2022

notwithstanding the absence of clear EU membership prospects, the Western Balkans are devoted to Europeanise themselves on their own terms. Although one cannot disregard the positive attention given to the initiative, it was not wholeheartedly welcomed by everyone in the region. It did raise many concerns among which that it represents a replacement of the actual EU membership, pushing forward economic integration while undermining rule of law efforts, favors just the three participating Western Balkan countries, and finally overshadows the work done by the Regional Cooperation Council and other organisations in enhancing regional cooperation with all Western Balkan countries.

The stalemate in the EU accession process was reflected on the domestic reform dynamics. The government in Skopje focused more on lifting the Bulgarian veto and less on internal, EU-related, reforms. Internal reforms aimed to increase democratization and alignment of the national legislative with the EU *acquis* were put almost on

hold. One of the processes that could have brought Europeanisation process in domestic affairs was the plan “Europe at Home”³. The plan foresaw reforms in the areas of judiciary and rule of law, public administration, election process and climate change. However, almost nine months since it was introduced, the government has not published any significant developments which would reflect a successful reach of the set goals in the plan. In addition to this, the highest Covid-19 mortality rate in Europe in certain periods of the year, corruption scandals involving high-ranking government officials, the fire in the modular Covid hospital in Tetovo in September 2021 and the consequent refusal by the former Prime Minister Zoran Zaev to accept the resignation of the Minister of Health make the top of the list of factors that created a cumulative effect that came to its downpour in the form of the dramatically decreased support for SDSM in the local elections.⁴ Following this, the former Prime Minister Zaev resigned from the position (including the party position). This domestic turbulence created a

³ Government of North Macedonia, (2021) Agenda “Europe at Home” accessed on 1 February 2022, https://www.sep.gov.mk/post/?id=5745#_YgZqR9_MKMo

⁴ Nechev, Z., Markovikj, N. (2021) What just happened in North Macedonia? 2021 municipal elections and their aftermath

political crisis in which the focus was placed on finding new leadership in the ruling party and forming a government.

Finally, North Macedonia has not come out of the crisis mode. The ongoing pandemic and since recently an energy crisis are still unraveling. Besides domestic economic incentives, the country also relies much on the economic aid provided by other financial institutions. The financial doubts were placed on the procurement of vaccines and the financial capabilities of the country to procure and deliver the vaccines. The pandemic had significant effects on the micro and small companies with almost three-quarters of all companies being to a certain extent faced with financial consequences of the crisis⁵ and it had even bigger effects on the citizens and their standard of living⁶.

2. Finding a compromise with Bulgaria – a reality or a mission impossible?

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The analysis looks into the citizens' perception of potential areas of compromise with Bulgaria based on their three specific demands: revision of the national historical narratives, language requirements and the status of the Bulgarian minority in North Macedonia.

2.1. Re-opening of the history books

In 2017, North Macedonia and Bulgaria signed the Treaty on friendship, good neighborhood relations and cooperation.

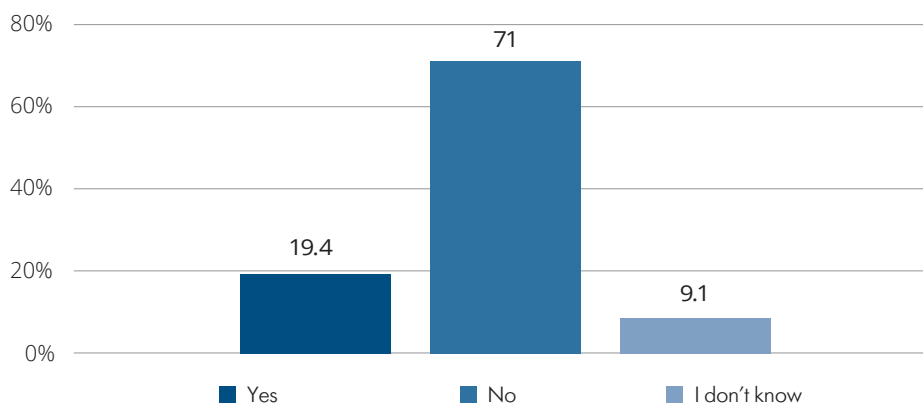
⁵ Hristovska, M. Bojana, (2021) Analysis of the effect of Covid-19 on workers who are part of the informal economy and temporarily employed workers, through proposed measures to support them https://fosm.mk/wp-content/uploads/2021/05/analitika-analiza-kovid-19-i-neformalnite-rabotniczi-vo-rsm-finalna.pdf?fbclid=IwAR1kTg5rzw8CvHJieDzmlLEryKwJwBm0rcBlss8TqIZg_H_h42EDFFVD78

⁶ Trade Economics (2022) Macedonia Food Inflation <https://tradingeconomics.com/macedonia/food-inflation#:~:text=Food%20Inflation%20in%20Macedonia%20averaged,percent%20in%20January%20of%202005>.

The Treaty required the formation of a Commission that would work on the joint history between the two contracting parties.⁷ This analysis researched the public attitude toward the revision of the national historical narratives, including on historical figures and events from different historical epochs.⁸

More than two-thirds of the surveyed citizens (71%) do not think that North Macedonia should concede the proposed historical narratives in exchange for accession negotiations, whereas 19.4% believe that meeting these demands should be an option if that unblocks the EU process.

Chart 1. Do you think that North Macedonia should make concessions regarding the historical narratives in order to proceed with the EU integration? (%)



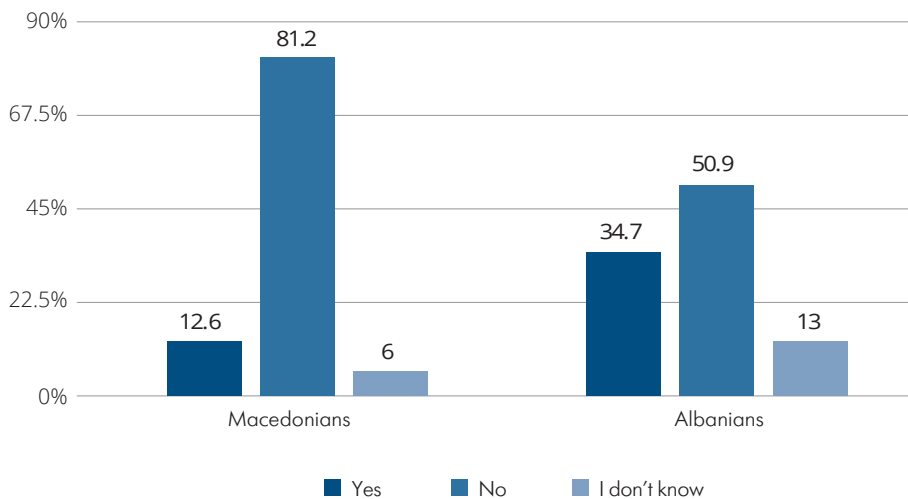
⁷ Marusic, S. J., (2021) Can North Macedonia Meet Bulgaria's Six Demands for Breakthrough?, accessed on 7 February 2022 <https://balkaninsight.com/2021/10/19/birn-fact-check-can-north-macedonia-meet-bulgarias-six-demands-for-breakthrough>

⁸ These include figures and events from the Middle Ages, the Ottoman period (especially associated with the historical VMRO), as well as World War II (especially associated with the Macedonian partisan movement, 1941 anti-fascist uprising, and its aftermath).

When controlled for ethnicity, a clear majority of ethnic Macedonians (81.2%) stand firmly for a negative response regarding this question, while only 12.6% would agree on meeting this demand. The majority of ethnic Albanians (50.9%)

are not supportive of meeting these demands even if it unblocks the process. However, almost a third of these responders (34.7%) would agree on historical revision if that would ease the road towards the EU.

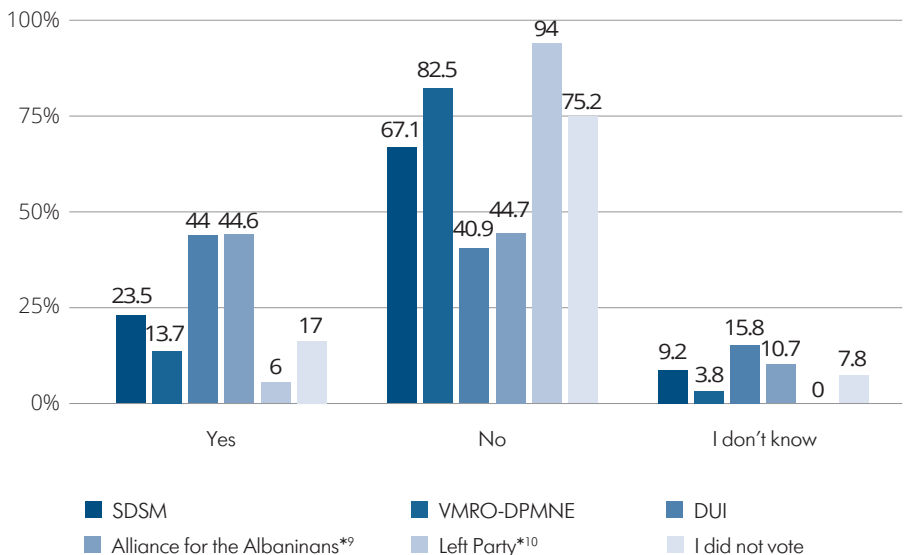
Chart 1.1 Do you think that North Macedonia should make concessions regarding the historical narratives in order to proceed with the EU integration? (controlled for ethnicity)



When controlled for partisanship, the results revealed that vast majority of VMRO-DPMNE supporters (82.5%) does not agree on a solution that would require revision of the history, while 67.1% of their SDSM counterparts do not agree with concessions in this area. A division in the opinions is visible among

the supporters of DUI. The yes camp is at 44% if this unblocks the EU accession process, whereas the no camp stands at 40.9%. Finally, 75.2% of those that did not vote in the last elections would not agree with any historical revision, whereas only 17% positively responded to the question.

Chart 1.2 Do you think that North Macedonia should make concessions regarding the historical narratives in order to proceed with the EU integration? (controlled for partisanship - how did you vote on the last parliamentary elections?) (%)



⁹ Too small database, not sufficient for interpretation

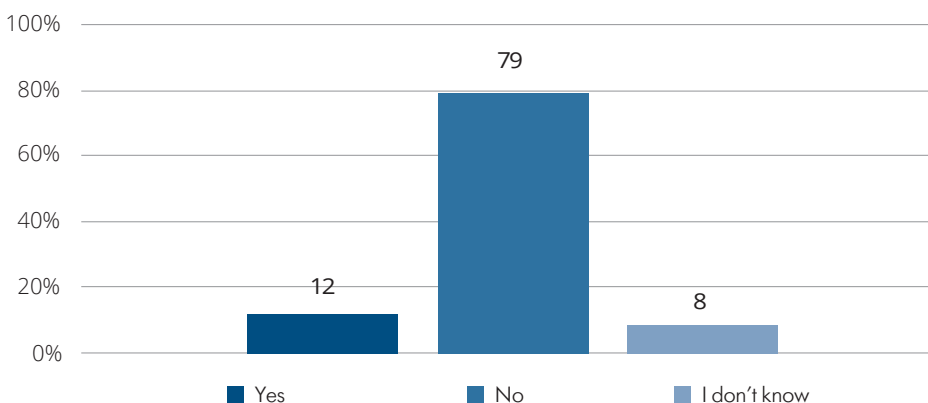
¹⁰ Too small database, not sufficient for interpretation

2.2. Not speaking the same language

One of the most publicly voiced Bulgarian demands regards the Macedonian language. The Bulgarian side claims the Macedonian language to be a regional variant of the Bulgarian

language and should be referred to as “the official language of the Republic of North Macedonia”¹¹ across EU institutions. If referring to “the Macedonian language”, an asterisk should add the note: “according to the Constitution of North Macedonia”.¹²

Chart 2. Do you think that North Macedonia should make a concession regarding the language in order to proceed with the EU integration? (%)



¹¹ Hajdari, U. (2020) Tongue-tied: Bulgaria's language gripe blocks North Macedonia's EU path, accessed 7 February 2022 <https://www.politico.eu/article/bulgaria-north-macedonia-eu-accession-talks-language-dispute/>

¹² Donchev, I. (2019) Дончев, И. (2019), What exactly does Bulgaria want from North Macedonia?, accessed on 7 February 2022 <https://bit.ly/3gHf5k>

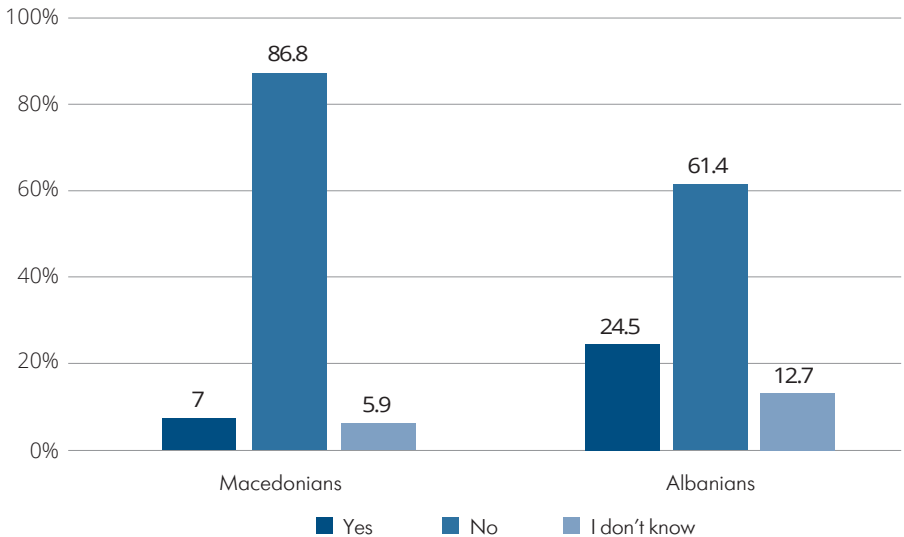
The results show that 79% of the responders do not think that North Macedonia should concede its language. Only 12% think that meeting this demand should be met if it is beneficial for the EU accession process.

When controlled for ethnicity, the results show a solid and almost undivided opinion among ethnic Macedonians who, by 86.8%, are not willing to make

concessions on their language.

A concession of this kind is equally unacceptable for a smaller majority of ethnic Albanians (61.4%). This shows an inter-ethnic acceptance of the importance of this issue and a firm position in both ethnic groups. The larger majority among ethnic Macedonians might indicate that they feel historically and ethnically more connected to the Macedonian language than ethnic Albanians.

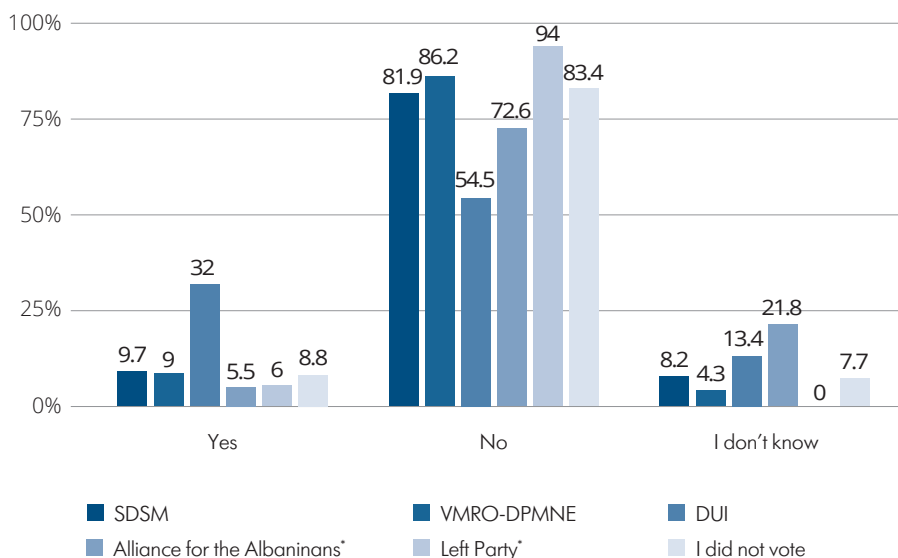
Graph 2.1 Do you think that North Macedonia should make a concession regarding the language in order to proceed with the EU integration? (controlled for ethnicity) (%)



Past editions of this questionnaire have shown differences among the supporters of VMRO-DPMNE and SDSM in questions related to national identity. However, in the case of the language, supporters of both parties predominantly agree that no concessions should be made. The

majority of DUI supporters (54.5%) think that North Macedonia should not meet this demand, whereas one-third (32%) are content to accept the Bulgarian language demands. The perception that North Macedonia should not meet this demand prevails among the majority of voters of every political party.

Chart 2.2 Do you think that North Macedonia should make a concession regarding the language in order to proceed with the EU integration? (controlled for partisanship - how did you vote on the last parliamentary elections?) (%)



* Too small database, not sufficient for interpretation

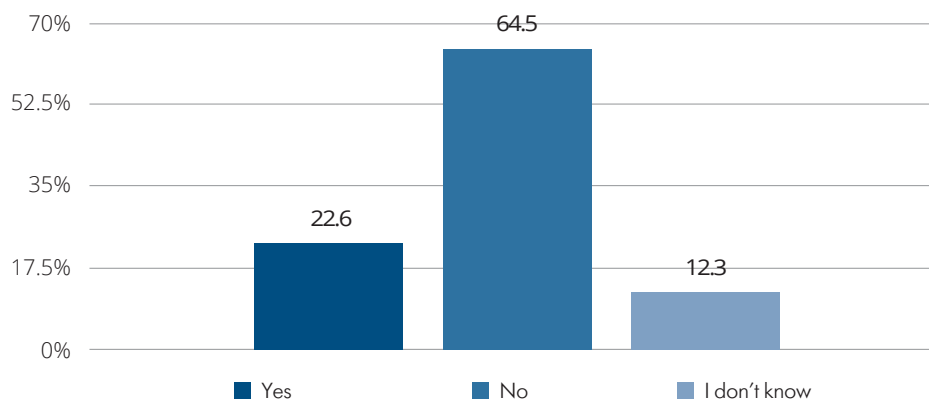
* Too small database, not sufficient for interpretation

2.3. Bulgarian minority in the North Macedonia

Another Bulgarian demand that is subject to analysis in this document is the willingness of respondents for concessions regarding the status of the Bulgarian minority in North Macedonia as a pathway towards lifting the veto. According to Macedonian legislation, a two-thirds majority is needed in order to change the Constitution, i.e. a wide consensus among political parties is

required. The responses show that around 64.5% of the surveyed citizens would not agree on meeting this demand. 22.6% agree that this kind of negotiation can be accepted. It is important to note that this survey was conducted at a time when the Bulgarian side had not yet clarified what exactly they meant by this demand. Compared to the other two demands, historical revision (71%) and language (79%), the results for this question show a slightly lower percentage of 'no' responders (64.5%).

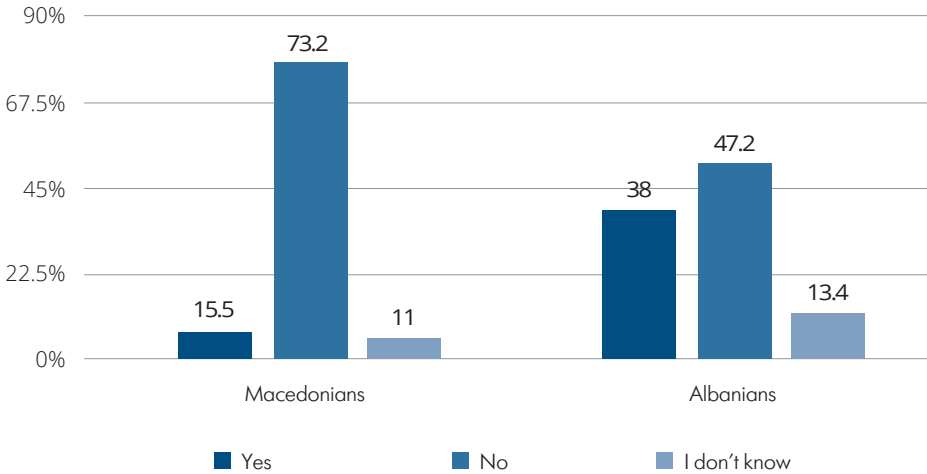
Chart 3. Do you think that North Macedonia should make a concession regarding the status of the Bulgarian minority in North Macedonia in order to proceed with the EU integration? (%)



Controlled by ethnicity, more than two-third majority of ethnic Macedonians (73.2%) would not agree on conceding on this requirement, while 15.5% would accept if it benefits the EU accession process. Ethnic Albanians have divided

opinions with a lead of those who would not agree on this issue (47.2%), compared to 38% who would agree that North Macedonia should respond positively to this demand.

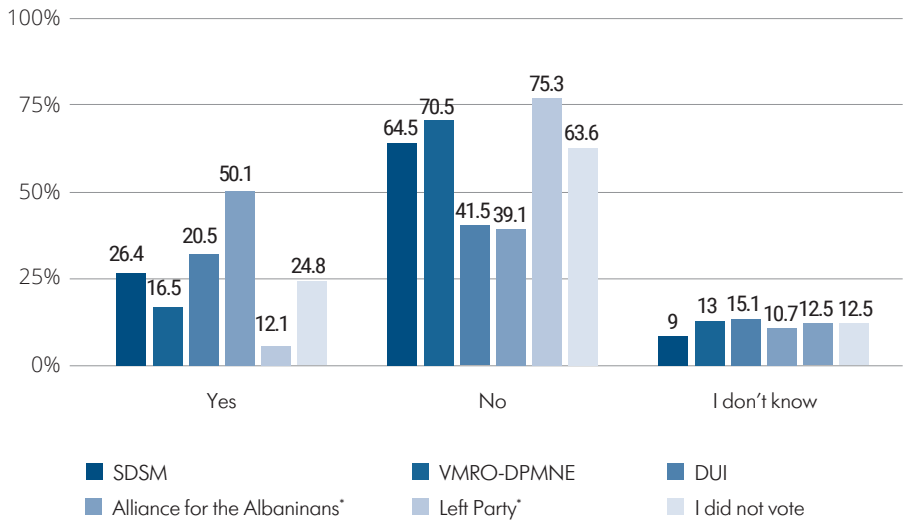
Chart 3.1 Do you think that North Macedonia should make a concession regarding the status of the Bulgarian minority in North Macedonia in order to proceed with the EU integration? (controlled for ethnicity) (%)



There are only slight differences among the supporters of SDSM (64.5%) and VMRO-DPMNE (70.5%). 41.5% of DUI supporters object concessions on

the status of the Bulgarian minority, whereas 20.5% of them would agree to this concession.

Chart 3.2 Do you think that North Macedonia should make a concession regarding the language in order to proceed with the EU integration? (controlled for partisanship - how did you vote on the last parliamentary elections?) (%)



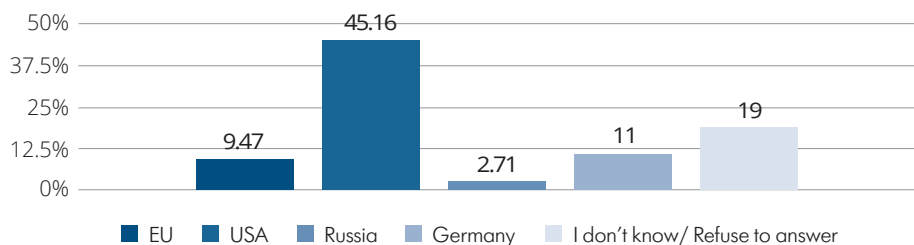
3. Losing the EU influence and in search of allies

In the following paragraphs, the analysis focuses on the respondents' perceptions on North Macedonia's greatest ally and foreign factor influence in the country. These questions are part of the survey since 2017, thus, allowing us to follow trends through the years.

In October 2021, the European Union and the United States had reaffirmed their determination to strengthen their engagement and support for the Western Balkans' European future.¹³

These two actors have played the biggest part in influencing the region and North Macedonia itself¹⁴. The results show that however only the US is perceived as the greatest foreign factor influence by a meaningful group of respondents (45.16%). Notably, 19% of the surveyed citizens do not consider any of the choices offered to have, or are unsure about, the greatest foreign actor influence. Germany ranks third with 11%, thus surpassing the EU (9.47%) by a meagre 1.5%. At the bottom of the chart stands Russia which is perceived by 2.7% of the population to have the greatest influence. Since only an insignificant number of surveyed citizens (<1%) perceive China as the greatest influencer, it is not presented in the ballot.

Chart 4. According to you, which foreign factor has the greatest influence in North Macedonia?



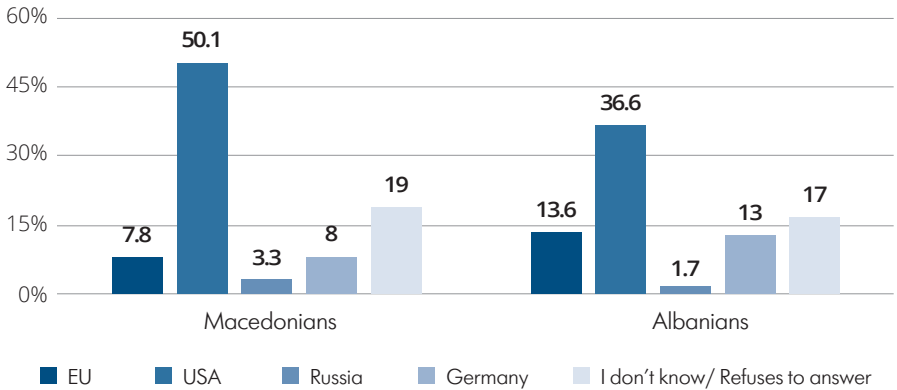
¹³ US Department of State (2021), Joint Statement on the Western Balkans, accessed on 6 February 2022 <https://www.state.gov/joint-statement-on-the-western-balkans/>

¹⁴ Feyerabend, F., Hansel, L. The influence of external actors in the Western Balkans accessed on 8 February 2022 https://www.kas.de/c/document_library/get_file?uuid=194afc48-b3be-e3bc-d1da-02771a223f73&groupId=252038

When controlled for ethnicity, this year's results show a change in perception especially among ethnic Macedonians. For the first time, ethnic Macedonians see greater influence in the US than

ethnic Albanians who have traditionally favored the US over other foreign actors.¹⁵ Only few ethnic Macedonians see the EU as greatest influence (7.8%), compared to a whopping 50.1% for the US.

Chart 4.1 According to you, which foreign factor has the greatest influence in North Macedonia? (controlled for ethnicity) (%)

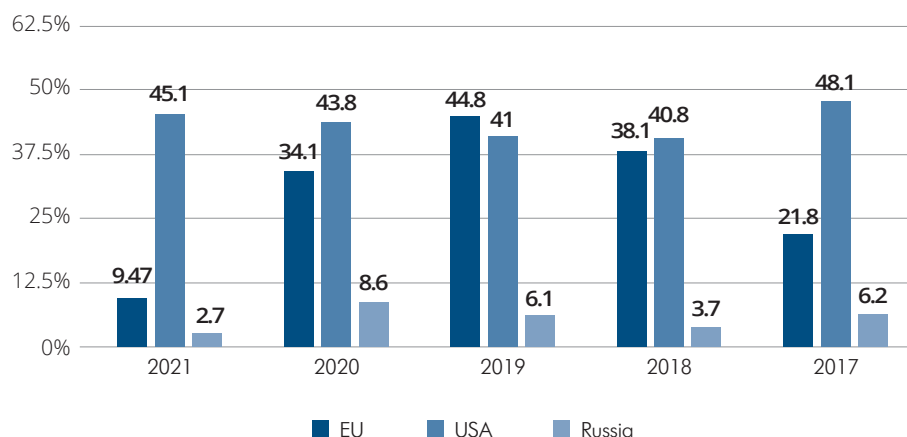


¹⁵ Nikolovski, I., Kirchner M. J., (2021), Political Roller-coaster – An eventful year for North Macedonia on its EU path <https://idscs.org.mk/en/2021/02/07/political-rollercoaster-an-eventful-year-for-north-macedonia-on-its-eu-path/>

Compared to previous years, the citizens' perception of the EU (9.47%) is lowest ever since this question has been part of the survey.¹⁶ Compared to 2019, there is a drastic decline from 44.8% to 9.5% in the recognition of the EU. This could be associated with high expectations for EU accession negotiations that the citizens had after accession negotiations were expected to commence in 2020. However, there has not been evident

progress in the EU accession process ever since. The EU's inability to influence Bulgaria to pave the EU way not only for North Macedonia (thus also for Albania), is likely to have contributed to the assertion that the EU lacks meaningful influence in the country. Additionally, the Covid19 crisis has shifted priorities and influenced perceptions in the EU and North Macedonia alike.

Chart 4.2 According to you, which foreign factor has the greatest influence in North Macedonia? (compared with previous years) (%)



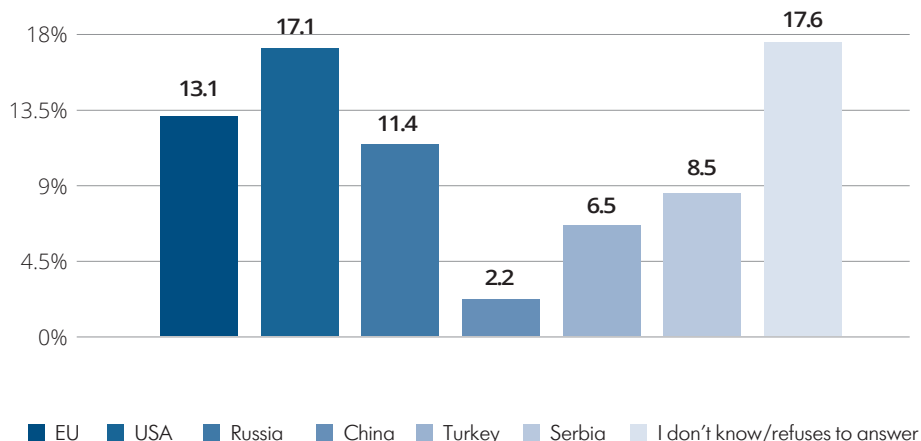
¹⁶ Ibid.

When it comes to North Macedonia's greatest ally, the 2021 results reveal that there is increasing difference among survey respondents. The US has been ranked first on this year's poll (17.1%), and EU second (13.1%), but Russia follows suit (11.4%). The highest percentage of respondents' accounts for those citizens who do not know (17.6%) or refuse to answer the question. This already says much in itself and needs attention in times of

global polarization growing tensions on the Eastern flank of NATO.

This year an additional foreign actor had to be included in the analysis: Serbia. The vaccine diplomacy of the Northern neighbor during the Covid19 pandemic has significantly influenced the thinking of the survey responders.¹⁷ Serbia ranks fourth in the poll with 8.5%, with Turkey fifth with 6.5%.

Chart 5. According to you, who would be North Macedonia's greatest ally? (%)

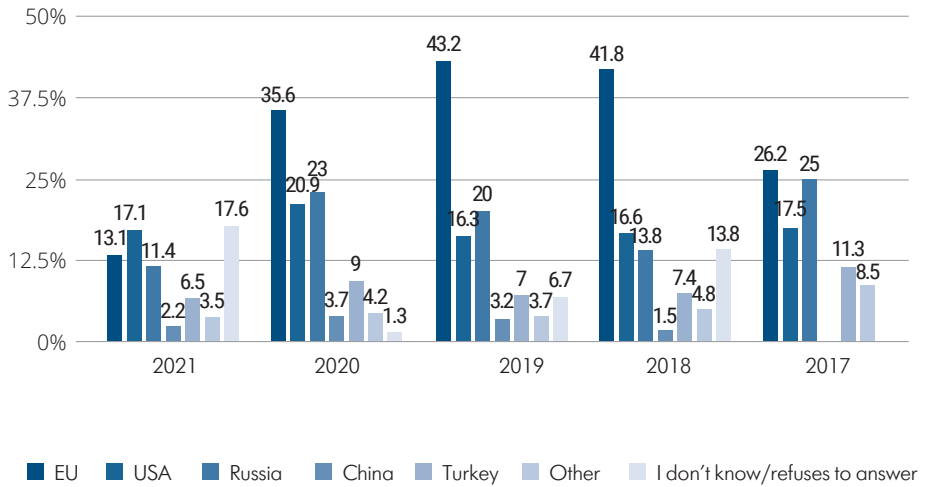


¹⁷ Data on this may be found in the last segment of this policy analysis

The EU's decline as the greatest ally to North Macedonia can be observed since 2020, but there are no dramatic changes when it comes to the US' or Russia's perceived alliance. Through the years, the US has maintained a steady response, and so did Russia. Compared to 2020, there is a decrease in the perceived ally

in Russia (from 23% in 2020 to 11.4% in 2021) and a low descent towards the US (from 20.9% in 2020 to 17.1% in 2021). The greatest change is seen among the people who do not know who is the country's greatest ally. This percentage has increased drastically from 1.3% in 2020 to 17.6% in 2021.

Chart 5.1 According to you, who would be North Macedonia's greatest ally? (compared with previous years)



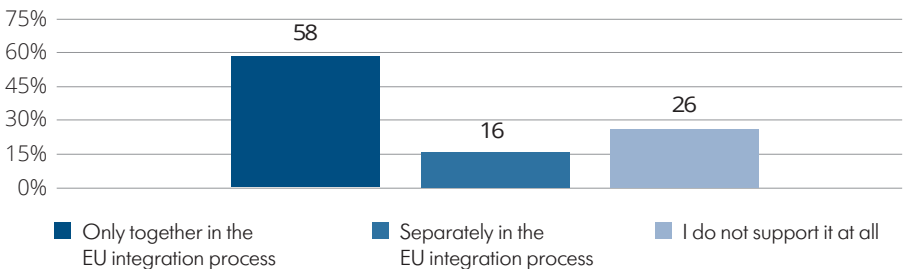
4. Increased regional cooperation or finding an alternative to the EU?

Regional cooperation has been part of the EU accession process with the countries from the Western Balkans for years now. Gradually, regional cooperation has been regarded not only as a way to strengthen ties as a means for quicker EU accession, but additionally as an integrative process to benefit first and foremost the region itself. Some observers would go so far to consider regional cooperation as an alternative trajectory to the EU accession process. To explore Macedonian opinions on this specific issue, this year's questionnaire

asks about the most publicly discussed and politically prominent initiative: Open Balkans. Because of its nontransparent structures, it is unclear whether this initiative runs parallel to the EU accession process or complements it.

When asked "Do you support a close alliance with the countries of the Western Balkans with specific reference to the once already in the Open Balkans initiative", results show that the majority of respondents are in full support of close cooperation *within* the EU accession process (58%). However, even though the number of supporters is high, there is a relevant percentage of respondents (26%) who would not support such an alliance at all. 16% respond positively to this alliance regardless of the EU accession process.

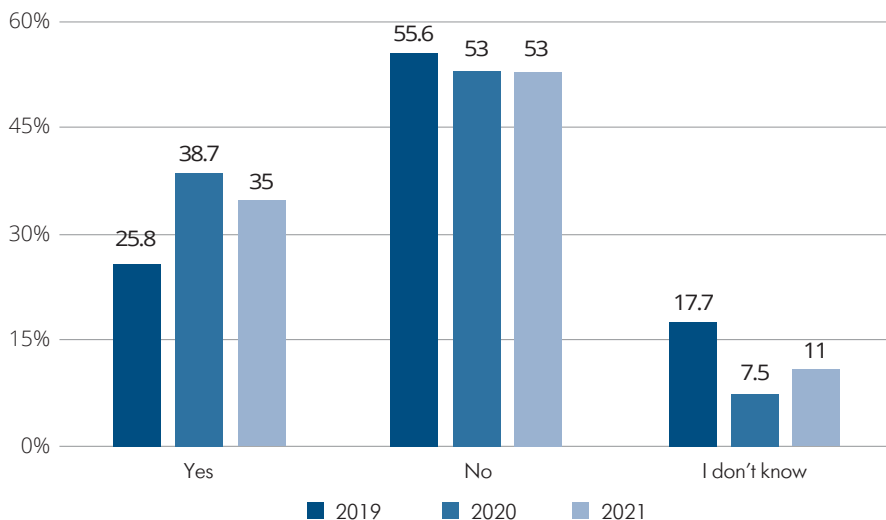
Chart 6. Do you support a close alliance with the countries of the Western Balkans? (Open Balkans)? (%)



When asked about membership in the Eurasian Union as an alternative to EU membership, the Eurasian Union is supported by one-thirds of survey

respondents, whereas opponents of that alternative Union remain in the majority with a stable 53%.

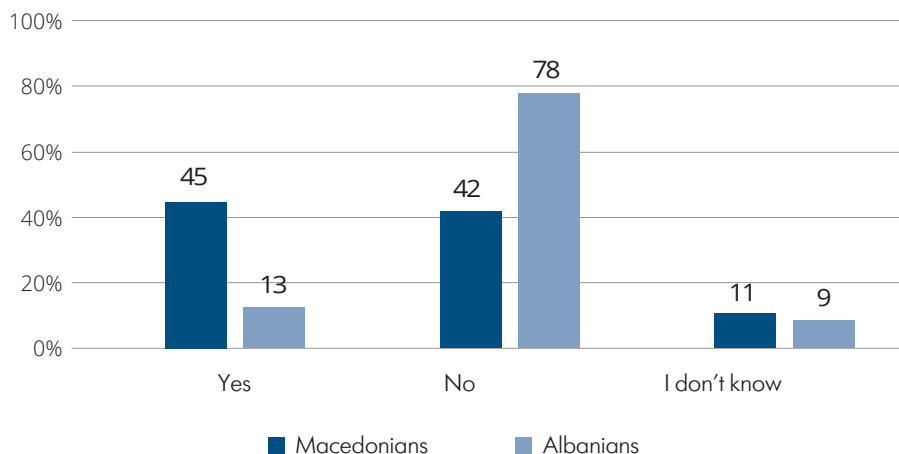
Chart 7. Will you support a membership in the Eurasian Union, led by Russia, as an alternative to the membership in the EU? (compared with previous years) (%)



When controlled for ethnicity, the results show that ethnic Macedonians are quite split in their assessment of such an alternative. Both groups (yes/no) gravitate around the 40% mark. In 2020¹⁸, the majority of the ethnic Macedonians did not see this membership as an alternative (52.2%)

to the EU, whereas this year, there is a 10% decrease. Ethnic Albanians on the other hand remain very determined in their negative opinion for such membership. 78% of them are on the opinion that such membership is not an option for North Macedonia, and 13% in favour.

Chart 7.1 Will you support a membership in the Eurasian Union, led by Russia, as an alternative to the membership in the EU? (controlled for ethnicity) (%)

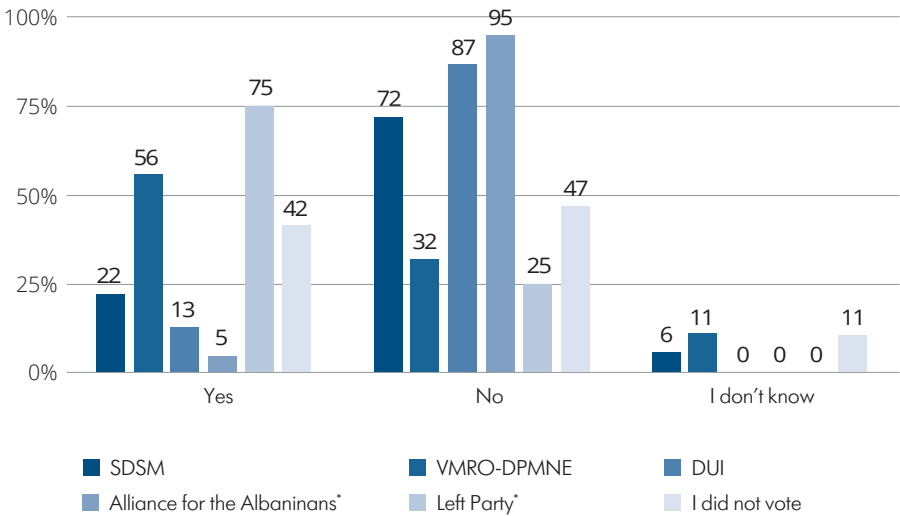


¹⁸ Nikolovski, I., Kirchner M. J., (2021), Political Roller-coaster – An eventful year for North Macedonia on its EU path <https://idscs.org.mk/en/2021/02/07/political-rollercoaster-an-eventful-year-for-north-macedonia-on-its-eu-path/>

Finally, the question was controlled for partisanship ('who did you vote for in the last parliamentary elections). The results show a distinct difference between VMRO-DPMNE supporters who predominantly regard the EAU membership as a positive alternative

(56%), compared to 22% of SDSM supporters. Not a clear-cut opinion whether there EAU is an alternative to the EU is present among the responders who did not vote. 42% of them are against such membership, while 47% would support it.

Chart 7.2 Will you support a membership in the Eurasian Union, led by Russia, as an alternative to the membership in the EU? (controlled for partisanship - how did you vote on the last parliamentary elections?) (%)



5. Friends in need

The health, political, and energy crisis in the country has had a severe impact on the economy. In times of crises, the economic (including medical) aid that the country relies on becomes important in overcoming and maintaining the financial stability of the country. Since 2018, the IDSCS and KAS are measuring the perception of the population about the biggest donor in North Macedonia. Because of the Covid19 pandemic, in this year's survey, the IDSCS have included an additional question with which we can measure the citizens' perception of the biggest donor to North Macedonia in terms of equipment

and vaccines for fighting the Covid19 pandemic.

The EU has proven to be perceived by the survey responders as the external actor that provides the biggest chunk of funds for development. This year this percentage accounts for 21.6% of the interviewed citizens, and second-ranked are the responders who do not know who provides money to the country. Then, it follows the US in second place with 16.5%. However, in comparison to previous years, in 2021, the perception of the EU as the greatest donor among the respondents has fallen from 46.9% in 2020. The fall is evident in all countries categories. The citizens are not sure that they know or have a very divided opinion that not a particular factor contributes to the country's development.

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

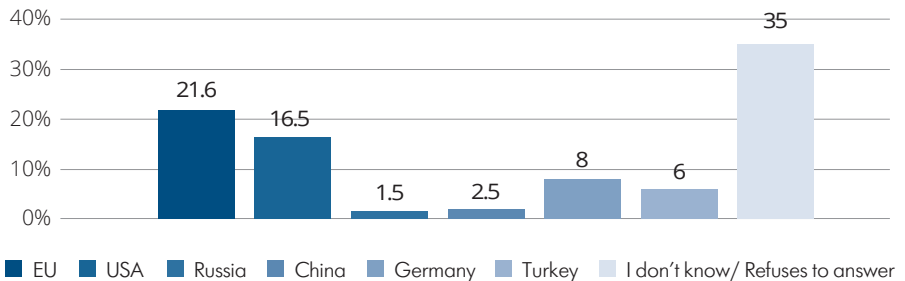
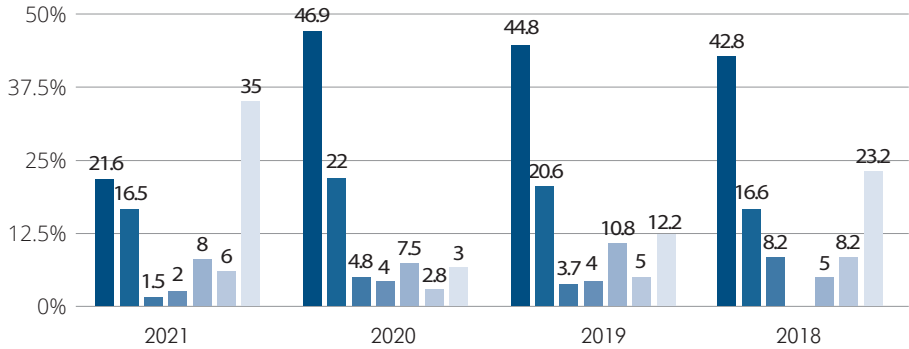


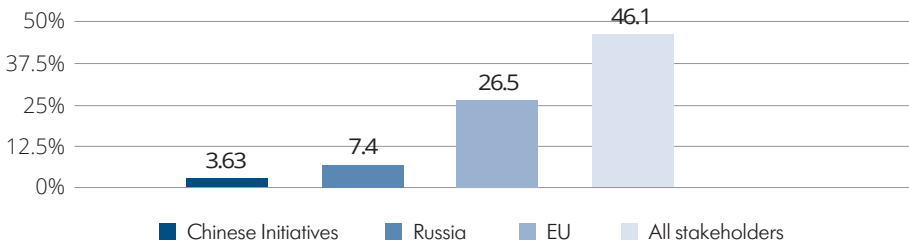
Chart 8.1 According to you, what is the greatest donor (provides money for development) in North Macedonia ? (compared with previous years) (%)



Finally, it is important to note the respondent’s behavior on the question of where the financial aid should come from. The majority of the participants (46.1%) believe that North Macedonia does not have to have any preferences where the assistance is coming from.

26.5% of the respondents believe that the aid should come from the EU, and 16.5% perceive the US as a factor that provides money for development, whereas Russia is at 7.4% and China is perceived as a preferable economic aid provider for 3.63%.

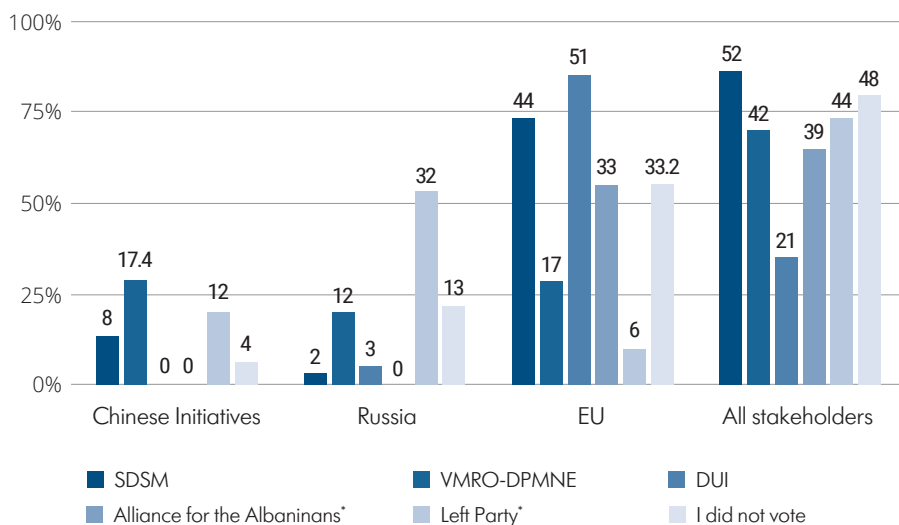
Chart 9. From which country should North Macedonia receive major economic aid? (%)



When controlled for partisanship, there is an interesting difference in the opinion between the SDSM and DUI supporters from one side and VMRO-DPMNE supporters from the other. The firmest believers in the EU as economic aid donors are the responders who were voting for the DUI (51.3%) on the

last parliamentary elections, followed by the SDSM supporters with 44%. Contrary to them, 17% of the VMRO-DPMNE supporters believe that North Macedonia should receive funds from the EU. The largest, however, percentages are for 'all stakeholders' with SDSM supporters at 52% and VMRO-DPMNE supporters at 42%.

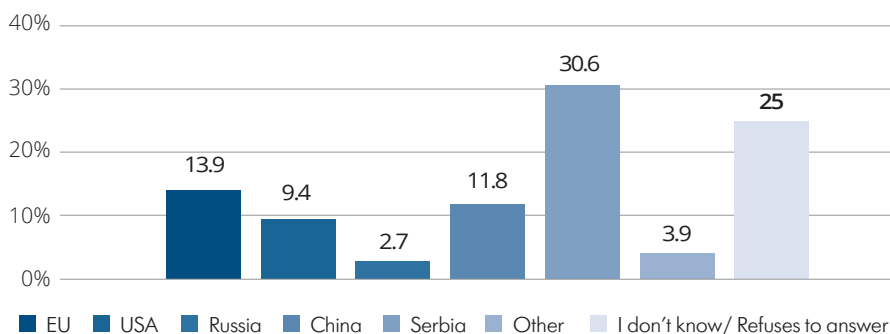
Chart 9.1 From which country should North Macedonia receive major economic aid? (controlled for partisanship - how did you vote on the last parliamentary elections?) (%)



In terms of the pandemic, the analysis of the results shows a clear picture of the who is the biggest perceived "helper" to the country. A third of the respondents (30.6%) have chosen Serbia, leaving behind the EU with 13.9% and China with 11.8%. This shows the huge impact the vaccine diplomacy of Serbia had on Macedonian citizens with the early opening of its border for vaccination and early in the pandemic sharing of their portion of vaccines to North Macedonia. However, a big number of responders also do not know or would not like to answer the question leading to a conclusion that they have not been

sufficiently informed about the medical assistance the country has received in the last 2 years. The difference between aid and procurement of these vaccines is not perceived by the respondents as well. Most of the vaccines coming from China, for example, have been purchased, whereas the great majority of the vaccines coming from the EU have been donated. Specifically, as of 1st of December 2021, North Macedonia has received/purchased 2.097.162 vaccines, out of which 921.180 are a donation. Most of these donated vaccines (741.000) have come from the EU and EU member states.¹⁹

Chart 10. Who is the biggest donor to North Macedonia in terms of equipment and vaccines for Covid-19? (%)



¹⁹ NGO Infocentar "The vaccines' road to North Macedonia #CovidImunometer 24-30 November 2021" https://nvoinfocentar.mk/wp-content/uploads/2021/12/ImmunoMeter-27_-24-30-November-2021.pdf

Conclusion and key findings

The imposed Bulgarian demands for lifting the veto are determining North Macedonia's EU accession path. The overall trends show that the concessions do not resonate with two-third or more of the responders. The survey results have showed that citizens are not in favour of an agreement with the Bulgarian demands even if that would mean unblocking the EU integration process.

In times with decreased EU credibility and no visible developments in the EU accession process, the citizens feel more disoriented than ever. Responders are finding increasingly difficult to identify a potential ally to the country indicating increased confusion among the population. For the first time since 2017, the pool of responders who cannot name the biggest ally overpasses the perception of the USA or the EU as allies. The key findings of the citizens' perception are outlined below:

- Two-thirds or more of the surveyed citizens think that North Macedonia should not concede to the Bulgarian demands related to historical revision (71%), language requirement (79%) and the status of the Bulgarian minority in North Macedonia (65.4%).
- The strongest inter-ethnic link exists in regards to the language. Ethnic Macedonians (86.8%) and ethnic Albanians (61.4%) would not support conceding to this Bulgarian demand.
- The US is perceived as the foreign factor with the greatest influence in North Macedonia (45.1%). 'I do not know' responders rank second with 19%.
- Ethnic Macedonians (50.1%) see greater influence in the US than ethnic Albanians (36.6%) who have traditionally favoured the US over other foreign actors.
- The EU's perceived influence in North Macedonia has dropped to the lowest ranking in recent years. (44.8% in 2019 to 9.5% in 2021). Only few ethnic Macedonians see the EU as greatest influence (7.8%).

- The citizens' perception of the EU as the biggest ally to the country has fallen from 43.2% in 2019 to 13.1% in 2021. In the same time, the percentage of responders that refuse to answer this question have raised from 1.3% in 2020 to 17.6% in 2021.
- More than a half of responders (56%) support a closer alliance between the current Open Balkan partners within the EU integration process.
- 53% of the responders do not see Eurasian Union as an alternative to the EU.
- More than a third of the responders (35%) are not aware or do not recognize the greatest donor that provides financial support for development in North Macedonia. The percentage of citizens who recognize the EU as the greatest donor has fallen from 44.8% in 2020 to 21.6% in 2021.
- The majority of the responders (46.1%) believe that North Macedonia should not have any preferences where the assistance is coming from, and therefore be open to all financial opportunities.
- Serbia (30.6%) has been recognized by a third of the surveyed citizens as the biggest donor of vaccines and medical equipment, followed by 25% of the citizens who do not know. The responders almost equally perceive the assistance from EU (13.9%) and China (11.8%) during the pandemic.

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Information about KAS

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

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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