



# New Global Uncertainties, Old European Commitments: Public Perception on EU Accession in 2025

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# Impressum

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# Introduction

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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.

Several questions are repeated annually, enabling the identification of long-term trends, shifts in public sentiment, and reactions to major political developments.

The 2025 edition of the survey examines public opinion across four core dimensions that reflect both domestic and international dynamics shaping the country's European trajectory. First, it explores how citizens perceive the EU accession process through an internal lens, including their preferred next steps, views on constitutional amendments, and reform priorities. Second, it assesses perceptions of the EU's readiness for enlargement, including support for different models of integration and expectations for EU preparedness by 2030.

The third segment investigates North Macedonia's place in a shifting world order by analysing citizens' geopolitical priorities, preferred foreign policy alignment, and strategic identity. Finally, the survey evaluates public perceptions of external economic influence and trusted partners, including the role of the EU, the United States, and other global actors in shaping the country's economic and political direction.

Together, these components provide a comprehensive overview of public attitudes toward the EU accession process, reform expectations, geopolitical positioning, and the broader strategic environment. Where relevant, the analysis disaggregates responses by political orientation and ethnicity to uncover deeper patterns and structural divides.

The survey was conducted through fieldwork carried out between October 22 and November 5, 2025, using a sample of 1003 respondents.

# Executive Summary

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## The Internal Lens on EU Accession

- Citizens remain divided on the next steps in the EU accession process. The largest share (27%) prefers renegotiating the negotiation framework ("French Proposal"), while 24% support constitutional amendments.
- Support for constitutional changes has remained stable over three years (20–24%), indicating long-term attitudinal consistency.
- Support for changing the negotiation framework has more than doubled since 2023 (13% -> 27%), reflecting growing frustration with external conditions rather than the EU itself.
- Political disengagement has decreased: the share of citizens who believe the country should "do nothing" declined from 29% in 2023 to 21% in 2025.
- Opinion is deeply polarized along ethnic lines: 57% of ethnic Albanians support constitutional amendments, compared to only 11% of ethnic Macedonians.
- A growing share of citizens (51%) now views EU negotiations as a process of improving legislation and standards—up from 33% in 2024—indicating a maturing understanding of the technical nature of accession.
- Citizens' reform priorities mirror the EU Growth Plan: environmental protection ranks as the top priority (44%), while judicial reform and anti-corruption hold consistent cross-priority importance.
- Constitutional amendments are viewed as necessary but not urgent, with 52% placing them as a second priority.
- Awareness of the EU Growth Plan and Reform Agenda remains low: 43% have never heard of them, pointing to a major communication gap.
- Citizens express cautious optimism regarding the economic benefits of the Growth Plan: 44% expect partial improvements in living standards, while 25% expect minimal impact.

## **Is the EU Prepared for Enlargement?**

- 40% of citizens support full-fledged EU membership, while 29% favor gradual integration that ends with membership within 10–15 years. Another 19% support staged integration without immediate membership.
- Optimism about the EU's readiness to enlarge by 2030 has rebounded, returning to roughly 50%, after dropping to 33% in 2024—indicating that citizens respond strongly to EU political signals.
- Perceptions of EU fairness remain mixed: 45% believe the EU is not fair or consistent, while 40% view it as partially fair. This reflects broader concerns over credibility and bilateral obstacles.  
Shifting world order – Where do we stand geopolitically?

## **Shifting world order – Where do we stand geopolitically?**

- Citizens do not exhibit a unified geopolitical priority. The top-ranked issues are: migration (23%), followed by security and regional stability (20%) and human rights and democratic values (18%). This fragmentation suggests an unclear geopolitical narrative in public debate.
- On foreign policy alignment, citizens prefer strategic flexibility: 47% favour partial alignment with the West while keeping national priorities. 30% prefer full independence and 23% support full alignment with EU/Western positions.
- Identity perceptions remain split but are shifting westward: 47% see North Macedonia as part of the Western world. 38% prefer a more independent geopolitical identity. The increase in Western orientation is likely tied to global instability and security concerns.

## **The Economic Course in Times of Challenges**

- Longitudinal data show that perceptions of US influence have risen by approximately 6% since 2024, continuing a trend of the United States being viewed as a key external factor of influence.
- The EU remains consistently perceived as one of the most influential and trustworthy partners, maintaining its position in the “best ally” category over the years.
- Russia continues to be perceived as having low influence and low ally potential, a trend stable for nearly a decade.
- Citizens clearly associate economic security and strategic stability with Western partners, reaffirming the country's long-term orientation despite domestic and political fluctuations.

# Overview of Political Developments in 2025

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The political developments in North Macedonia in 2025 represented a dynamic mix of (un)expected twists, old conflicts in a new guise, and a struggle for influence that revealed the true architecture of power in the country.

On October 19 and November 2, the eighth local elections since the country's independence were held, in which the ruling party VMRO-DPMNE achieved a dominant result, winning 55 mayoral positions out of a total of 82 municipalities, including the mayoralty of the capital city, Skopje<sup>1</sup>. In terms of political implications, this local election victory strengthened the position of the central government and provided additional political momentum to VMRO-DPMNE in implementing its programmatic priorities at both national and local levels, particularly in areas such as municipal policy, infrastructure, and local economic development. However, on the other hand, such a stronger political position at both national and local levels requires careful management to avoid circumstances that could gradually create the impression of excessive party dominance.

In 2025, the process of accession to the European Union continued to be complex and challenging. The European Commission's annual report on North Macedonia<sup>2</sup>, published in November, noted moderate progress in certain areas, while also highlighting serious and long-standing weaknesses. Among these, the need for more substantial reforms in the rule of law, insufficient institutional transparency, and the failure to implement the OSCE/ODIHR and Venice Commission recommendations regarding amendments to the Electoral Code, which have been recurring over an extended period stood out. In this way, the European Commission once again reaffirmed its principled position that the European path is not a formality, but a process that requires tangible, structural, and systemic changes.

From a political perspective, European integration remains high on the agenda, as emphasized in government programs, strategies, and programmatic documents of the ruling majority. However, behind the declarative support for the European course lies the fact that key reforms—particularly in the judiciary, the fight against corruption, the rule of law, and the provision of adequate administrative resources—remain essential prerequisites for tangible progress in the negotiations. This creates a clear contrast between political commitments and the pace of implementation of the necessary reforms.<sup>3</sup>

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<sup>1</sup> State Election Commission: Conclusion on the Completion of the 2025 Local Elections – <https://www.sec.mk/zakluchok-za-zavrshuvanje-na-lokalnite-izbori-2025-godina/>

<sup>2</sup> EC: North Macedonia Report 2025 – [https://enlargement.ec.europa.eu/north-macedonia-report-2025\\_en](https://enlargement.ec.europa.eu/north-macedonia-report-2025_en)

<sup>3</sup> 2025 Communication on EU enlargement policy - [https://enlargement.ec.europa.eu/document/download/eb69a890-40d6-4696-801e-612d51709fdd\\_en?filename=2025%20Communication%20on%20EU%20Enlargement%20Policy.pdf](https://enlargement.ec.europa.eu/document/download/eb69a890-40d6-4696-801e-612d51709fdd_en?filename=2025%20Communication%20on%20EU%20Enlargement%20Policy.pdf)

Also, North Macedonia has not yet adopted the necessary constitutional changes with a view to including in the Constitution citizens who live within the borders of the state and who are part of other people, such as Bulgarians, referred to in the Council Conclusions of July 2022, which the country committed to launch and achieve<sup>4</sup>.

North Macedonia actively engaged in the new Growth Plan<sup>5</sup> for the Western Balkans and began implementing the four pillars of the plan: gradual integration with the EU single market, regional economic integration, fundamental reforms, and increased financial support. Within the framework of the Reform and Growth Instrument, an EU performance-based tool supporting the EU accession process, the country adopted its Reform Agenda<sup>6</sup>, which covers reforms in the following areas: (1) governance, public administration reform, and public finance management; (2) green and digital transition; (3) human capital; (4) private sector development and business environment; and (5) fundamental rights and the rule of law.

Parallel to the European integration process, economic developments in 2025 further shaped the political dynamics. The macroeconomic context was marked by increased fiscal pressure: the budget deficit<sup>7</sup> re-emerged as a significant issue in the first half of the year, while inflationary fluctuations created uncertainty in public finances.<sup>8</sup> These trends highlighted the need for greater stability and predictability, particularly given their impact on the long-term credibility of economic policy.

In such circumstances, foreign direct investment remained a sensitive issue. Data for the first quarter of 2025 showed lower inflows compared to the same period in the previous year<sup>9</sup>, intensifying concerns regarding the current investment climate. Although such short-term variations are not unusual, they are significant for the labor market and for the country's positioning as an attractive destination for capital, especially at a time when reform processes are closely monitored by international partners.

In response, the government implemented a series of measures aimed at stimulating economic activity, including initiatives to adjust customs policies to strengthen trade relations. Particular

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<sup>4</sup> Ibid

<sup>5</sup> Directorate-General for Neighborhood and Enlargement Negotiations: Growth Plan for the Western Balkans – [https://enlargement.ec.europa.eu/2023-communication-new-growth-plan-western-balkans\\_en](https://enlargement.ec.europa.eu/2023-communication-new-growth-plan-western-balkans_en)

<sup>6</sup> Ministry of European Affairs: <https://mep.gov.mk/en/post/?id=15800>

<sup>7</sup> IMF Executive Board Concludes 2025 Article IV Consultation with the Republic of North Macedonia - [https://www.imf.org/en/news/articles/2025/05/06/pr-25129-republic-of-north-macedonia-imf-concludes-2025-article-iv-consultation?utm\\_](https://www.imf.org/en/news/articles/2025/05/06/pr-25129-republic-of-north-macedonia-imf-concludes-2025-article-iv-consultation?utm_)

<sup>8</sup> The 2025 budget, adopted by Parliament, includes a deficit of 4% of GDP" - <https://new.mia.mk/story/parliament-approves-2025-budget>

<sup>9</sup> NBRM, Press Release, 29.08.2025 – [https://www.nbrm.mk/content/statistika/Soopstenija/PB/2025/Soopstenie\\_PB\\_kv2\\_2025\\_m.pdf](https://www.nbrm.mk/content/statistika/Soopstenija/PB/2025/Soopstenie_PB_kv2_2025_m.pdf)

attention was drawn to the announcement of reduced import duties on American products, which was interpreted as a signal of deepening economic-diplomatic cooperation with the United States. These steps reflect the government's determination to attract new partners and create conditions for stronger economic momentum amid complex political and economic challenges.

At the global level, 2025 brought significant geopolitical disruptions: the return of Donald Trump to the White House reinforced the "America First"<sup>10</sup> agenda, generating tensions with traditional allies and prompting revised trade and security policies. Within the European Union, the focus was on internal reforms, strengthening common security and economic policies, and adapting institutions to the new cycle of European leadership resulting from the 2024 European Parliament elections.<sup>11</sup> Continued support for Ukraine<sup>12</sup> remained a key priority, through ongoing financial and military assistance and coordinated policies to address the war's impact on European security and energy stability.

In the next part, we explore the perception of the citizens for four critical annual developments. Firstly, we dive into the EU accession road internally, then we focus on the EU itself and the possible scenarios, followed by perception of broader geopolitical actors, and finally we delve into the perception for economic indicators.

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<sup>10</sup> President Trump's America First Priorities - <https://www.whitehouse.gov/briefings-statements/2025/01/president-trumps-america-first-priorities/>

<sup>11</sup> Council of the EU: Strategic agenda 2024-2029 – [https://www.consilium.europa.eu/en/european-council/strategic-agenda-2024-2029/?utm\\_source=chatgpt.com](https://www.consilium.europa.eu/en/european-council/strategic-agenda-2024-2029/?utm_source=chatgpt.com)

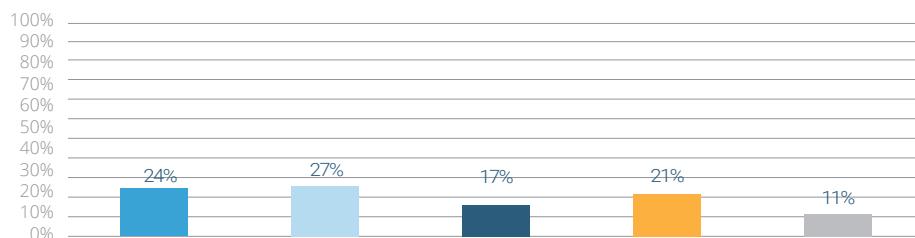
<sup>12</sup> EC: Commission steps up support for Ukraine's energy security and paves the way for full market integration – [https://enlargement.ec.europa.eu/news/commission-steps-support-ukraines-energy-security-and-paves-way-full-market-integration-2025-02-24\\_en?utm\\_source=chatgpt.com](https://enlargement.ec.europa.eu/news/commission-steps-support-ukraines-energy-security-and-paves-way-full-market-integration-2025-02-24_en?utm_source=chatgpt.com)

# The Internal Lens on EU Accession

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Entering 2025, North Macedonia's EU journey was increasingly influenced by internal dilemmas, from constitutional changes to reform priorities, rather than procedural steps alone. The central question in the EU accession debate continued to be the constitutional amendments required to advance to the next negotiating stage. The Government in place since 2024 maintained the position that constitutional changes will not be made without firm guarantees from the EU that future blockages will not occur. Yet, the EU remains fixed on the stance that the constitutional amendments are the only way to continue with the negotiation and to start opening clusters. Against this contradictory, the survey explored what citizens perceive as the next necessary steps toward the EU.

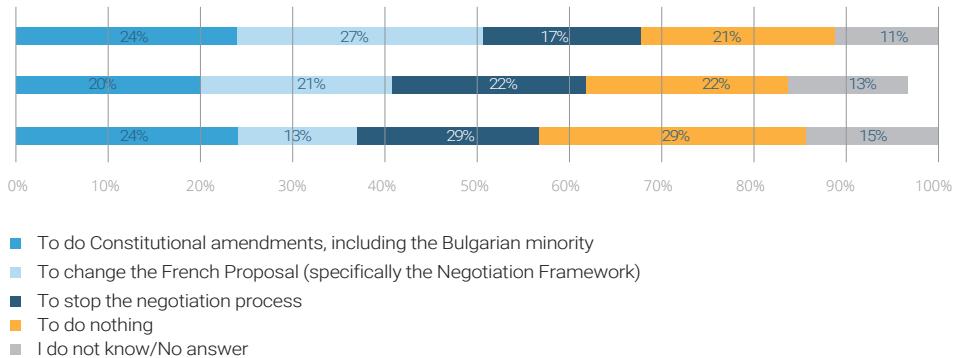
## Which changes do you think should be made on the path towards the European Union?



- To do Constitutional amendments, including the Bulgarian minority
- To change the French Proposal (specifically the Negotiation Framework)
- To stop the negotiation process
- To do nothing
- I do not know/No answer

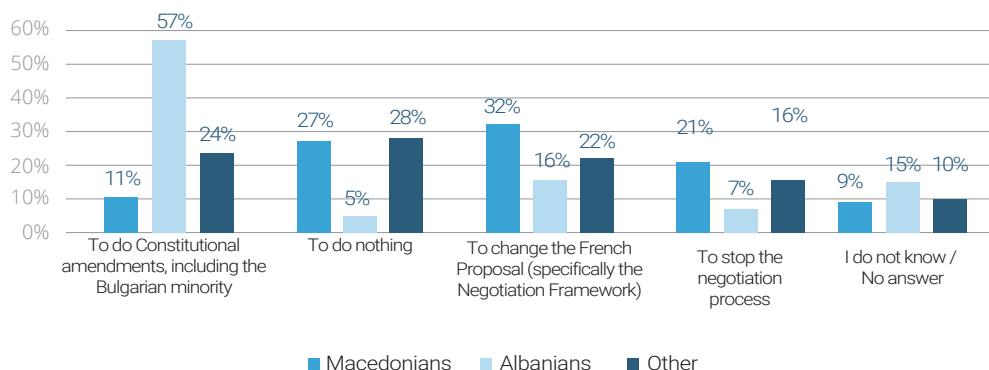
The data demonstrate the absence of consensus. The most preferred option, supported by 27% of citizens is to renegotiate or change the current negotiation framework ("French Proposal"), despite this being the least feasible scenario. Constitutional amendments follow with 24%. More pessimistic or passive attitudes of doing nothing (21%) or stopping the process entirely (17%), also carry significant weight.

### Which changes you think should be made on the path towards the European Union? (2023-2025)



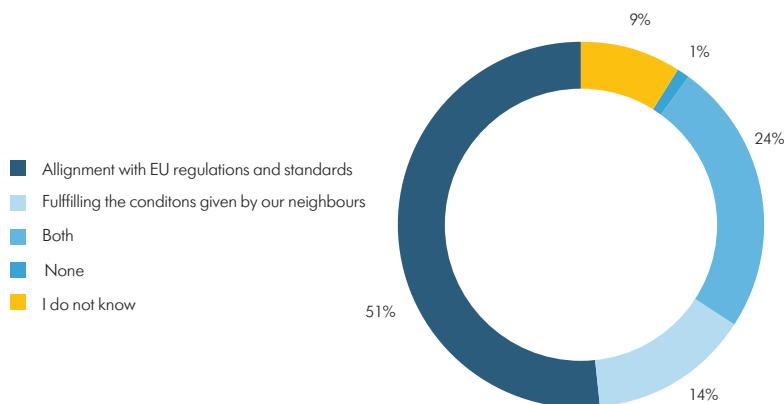
Public opinion on constitutional changes has remained remarkably stable across the last three years, fluctuating only between 20% and 24%. In contrast, support for changing the negotiation framework ('French Proposal') has more than doubled since 2023 (from 13% to 27%), indicating growing frustration with the external conditions of the accession process. At the same time, passive attitudes ('do nothing') have declined significantly (from 29% in 2023 to 21% in 2025), suggesting decreasing political fatigue and greater public engagement. Importantly, support for stopping the negotiation process remains in decline confirming that Euroscepticism has not increased. Overall, the trend shows a public increasingly critical of the negotiation framework rather than of EU membership itself.

### Which changes you think should be made on the path towards the European Union? (ethnicity)



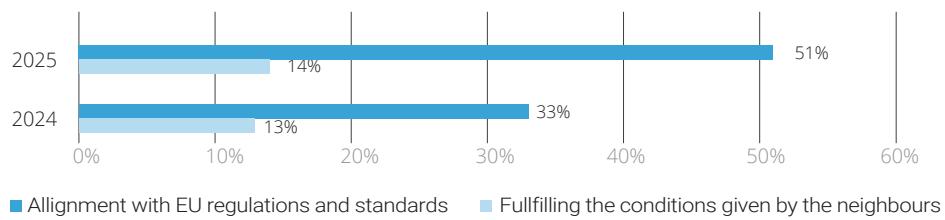
Differences become much sharper when the data is viewed through the lens of ethnicity. A majority of ethnic Albanians (57%) support constitutional amendments as the next step. In sharp contrast, only 11% of ethnic Macedonians support this option. For ethnic Macedonians, the dominant preference (32%) is changing the negotiation framework, followed by 27% choosing "do nothing." These findings reflect the deep ethnic polarization surrounding the constitutional amendments and the broader EU integration debate.

#### How do you perceive the EU negotiation process?



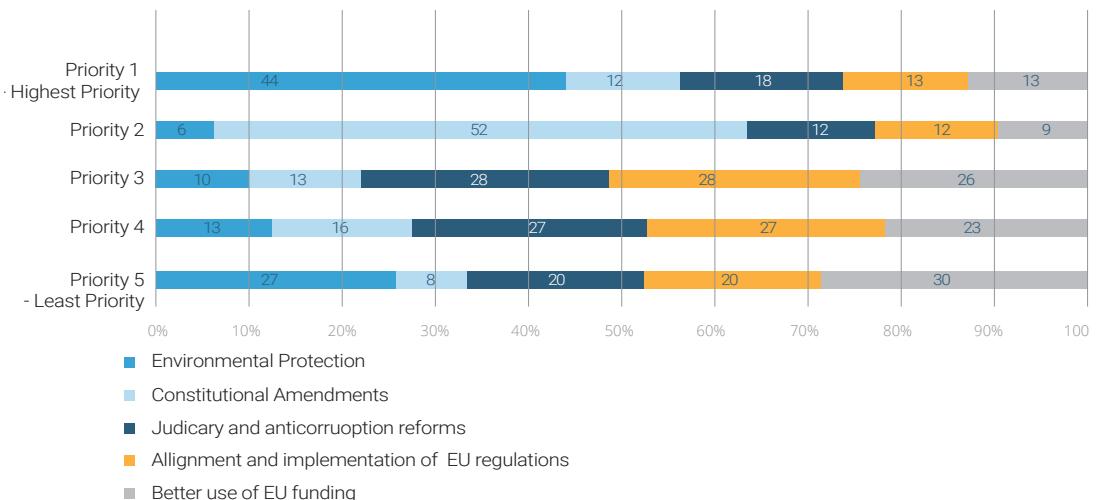
#### How do you perceive the EU negotiation process?

2024-2025



Although public discourse has been heavily focused on constitutional amendments, the survey shows that most citizens (51%) primarily associate the EU negotiation process with improving legislation and standards. This marks a strong increase from 33% last year, indicating a shift from perceiving the process as primarily political to recognizing its technical and reform-driven nature. Importantly, this view is consistent across ethnic communities and party affiliations.

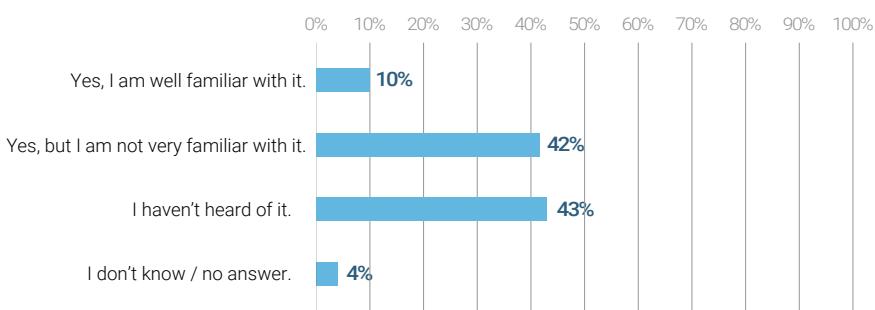
### List of priorities in the accession process



When asked to rank priorities for the country within the accession process, citizens demonstrate strong support for environmental protection, with 44% ranking it as the top priority. Constitutional amendments, although central in political discourse, are predominantly ranked as a second priority (52%), indicating that citizens see them as necessary but not urgent. Judicial reform and anti-corruption efforts show consistently high importance across all rankings, suggesting broad but diffuse support. In contrast, alignment with EU legislation and the utilization of EU funds are perceived as mid- to low-level priorities, reflecting their more technical and less visible nature.

The priority ranking provided by citizens closely mirrors the structure of the EU Growth Plan and its Reform Agenda. Environmental protection, citizens' strongest priority corresponds directly to the reform agenda green transition pillar. Likewise, the consistently high importance placed on judicial reform aligns with the rule of law and anti-corruption conditionalities that determine reform-linked financing.

### Have you heard about the European Union's Growth Plan and the reform agendas for the Western Balkan countries?

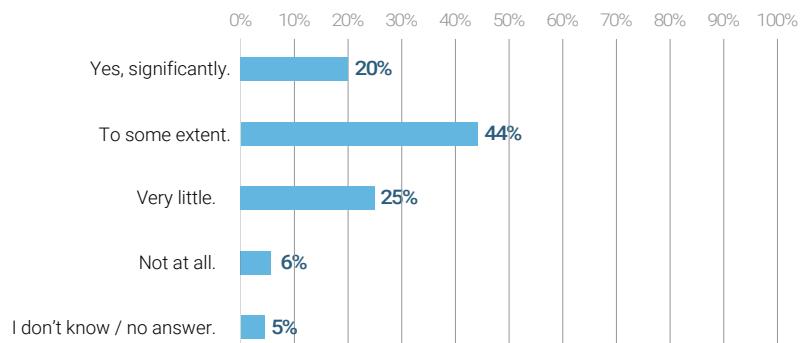


Despite the financial and strategic importance of the Growth Plan, public awareness of the instrument remains limited. While some respondents report having heard about the Reform Agenda, they lack clarity regarding its purpose and content. Notably, 43% of citizens have not heard about the Reform Agenda at all, indicating that the instrument has not yet penetrated public discourse.

This low level of awareness highlights a significant communication gap. Given that the Growth Plan directly supports many of the reform's citizens priorities—such as environmental protection, judicial reform, and legislation alignment—there is a clear need for targeted communication efforts to explain how these reforms translate into financial support, tangible benefits, and progress toward EU integration.

The mismatch between citizens' reform priorities and their limited awareness of the Growth Plan suggests that the public is supportive of the reforms themselves, but unfamiliar with the EU instruments that fund and incentivize them.

**Do you think that the funds from the Growth Plan will contribute to improving the standard of living in North Macedonia?**



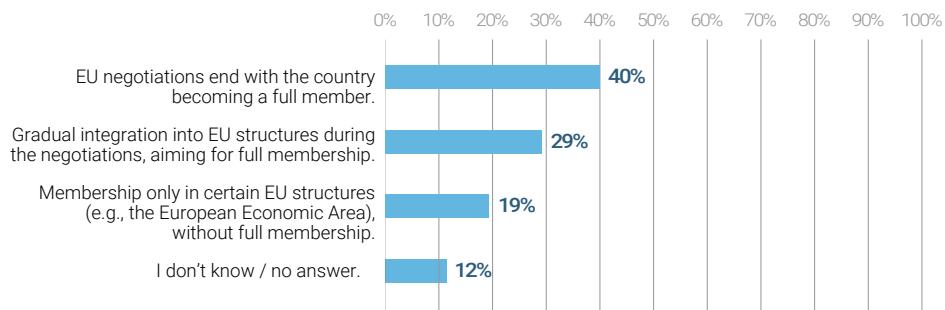
Citizens are divided on whether the Growth Plan and Reform Agenda funds will meaningfully improve living standards in North Macedonia. A plurality—44%—believe the funds will contribute only partially, while an additional 25% think the impact will be minimal. This distribution suggests cautious optimism, but also reflects a broader skepticism about the state's capacity to translate external financial support into visible improvements in everyday life.

# Is the EU prepared for enlargement?

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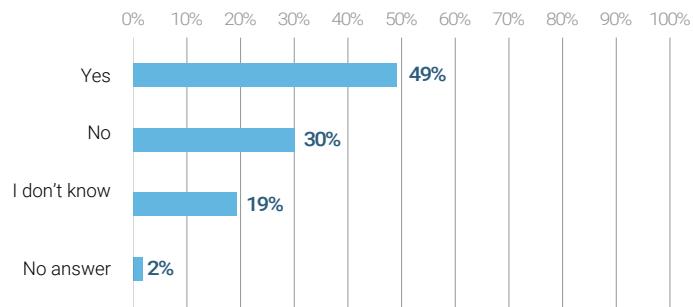
Debates on the future of enlargement increasingly focus on the EU's capacity to absorb new members and whether internal reforms, particularly related to decision-making, budget allocation, and institutional functioning must precede further expansion. In addition, new models of membership and phased integration have gained prominence in recent years, reflecting the EU's search for ways to keep the enlargement process credible while addressing internal constraints. These models include gradual or staged integration, participation in the Single Market before full membership, or accession with limited political rights until institutional reforms are completed. In that regard, citizens were asked which model of integration they support.

## Which model of integration with the EU do you support?

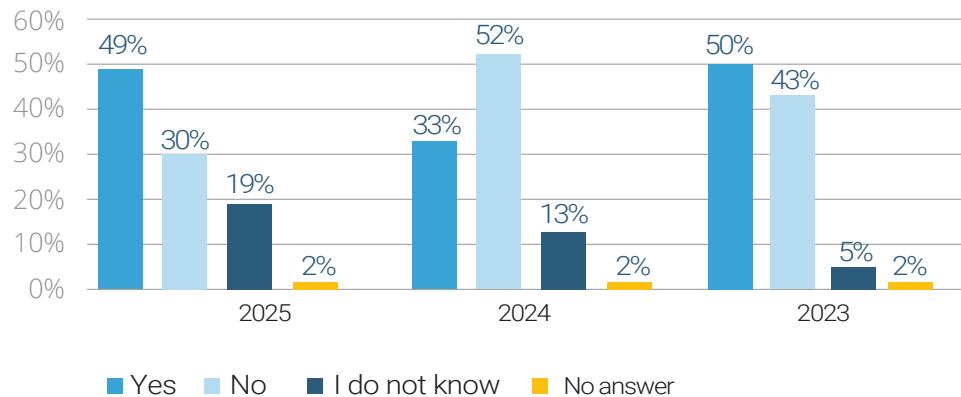


The results show that 40% favour full-fledged EU membership, reflecting the continued appeal of full accession as the ultimate goal. Meanwhile, 29% support gradual integration that would eventually lead to membership within 10–15 years, and 19% support gradual integration without immediate full membership. These findings indicate that while the majority ultimately prefer traditional enlargement, a substantial share of citizens is open to phased or sectoral integration pathways, particularly those that provide earlier access to the Single Market.

## Do you think that EU will be ready to accept WB countries as Member States by 2030?

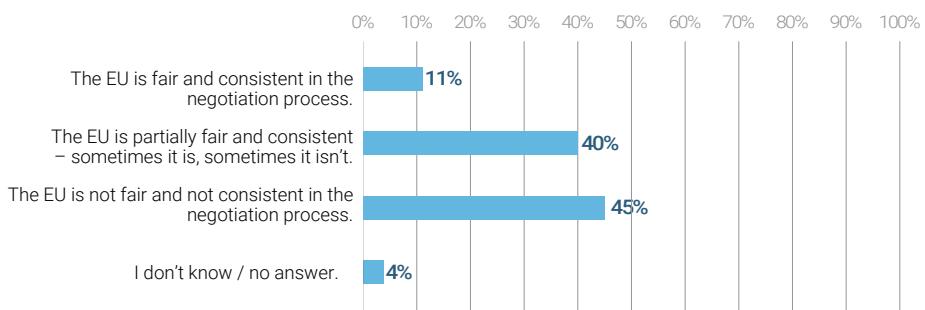


**Do you think that the EU will be ready to accept the WB countries as Member States by 2030?  
(2023-2025)**



With 2030 increasingly referenced as a possible horizon for the European Union's next enlargement, the year has become both a political benchmark and a test of whether candidate countries and the EU itself can deliver the reforms needed for a credible accession process. Almost most of the responders believe that the EU will be prepared to accept WB countries by 2030. This percentage has risen to the level of 2023 when 50% agreed that EU will be ready to accept new members, and only a third (33%) last year supported this statement.

**What is the European Union's stance toward the country regarding the negotiation process?**



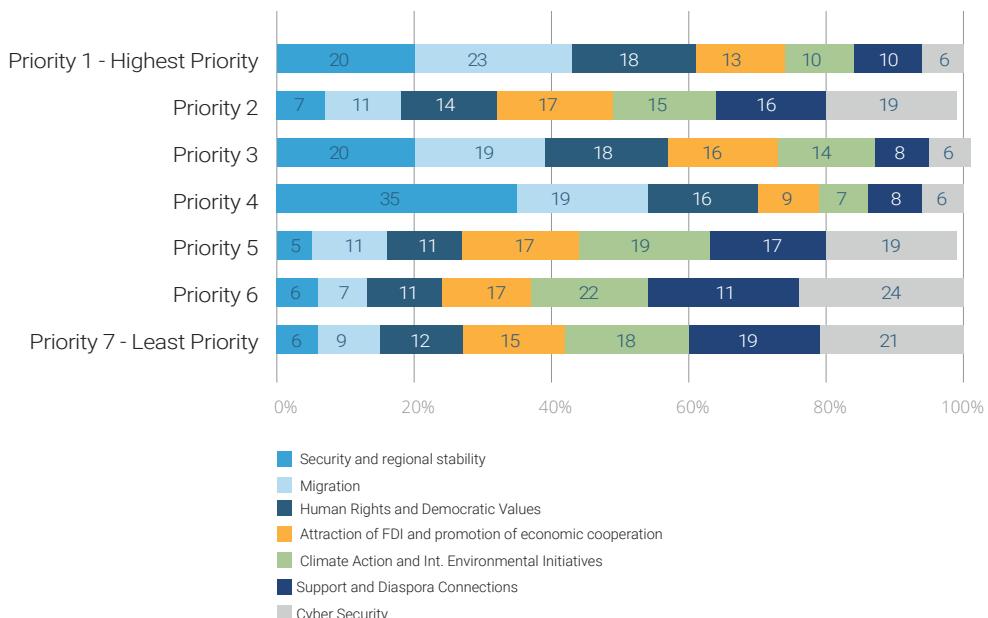
Finally, the analysis investigates how the relationship from the EU is perceived by the citizens. The answers portray a divided picture with 40% believing EU is partially fair, in some aspects yes, in some no, which might implicate on the technical vs. political issues, and 45% believe that EU is not fair and consistent at all which puts some shade on the credibility of EU in this country.

# Shifting world order – Where do we stand geopolitically?

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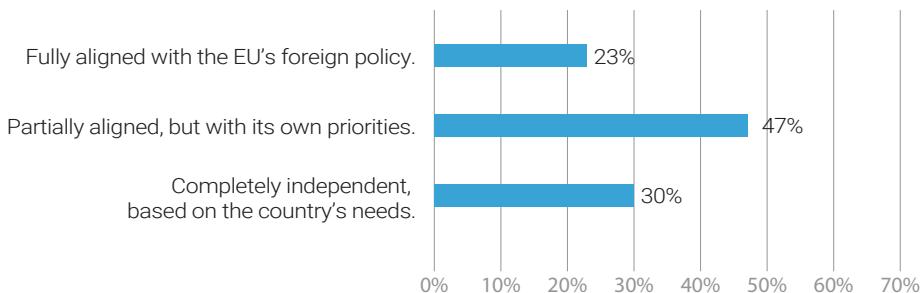
To better understand North Macedonia's geopolitical positioning, the survey asked citizens to rank several global priorities. The results reveal an absence of a single, dominant priority among respondents, indicating that the public debate on foreign policy remains fragmented and unsystematic. Citizens were asked to prioritize areas in foreign policy.

## List the priorities of the following areas in the Government's foreign policy



When identifying the top national priority, migration leads with 23%, followed by regional stability and security with 20%, and human rights and democracy with 18%. The nearly even distribution across categories suggests citizens do not share a unified view on where North Macedonia should position itself globally—likely a reflection of competing narratives in the public sphere and the lack of a consistent national geopolitical storyline.

## What should be the Government's approach regarding the country's foreign policy?

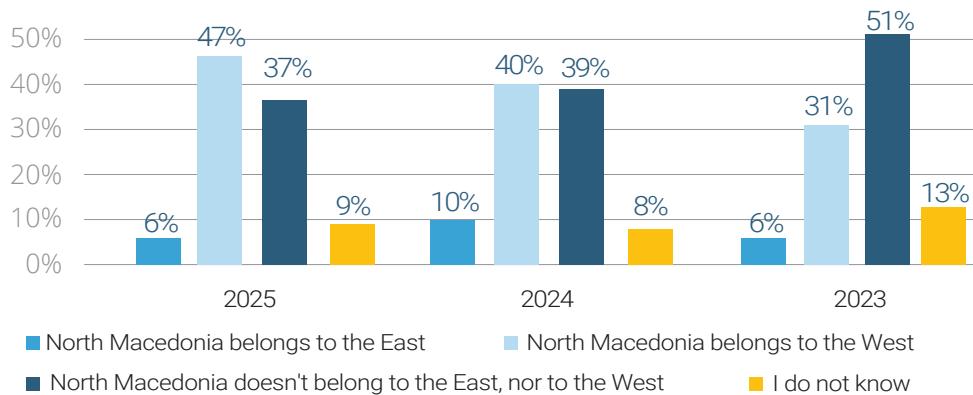


North Macedonia is often praised internationally for its full alignment with the EU's Common Foreign and Security Policy (CFSP). The country has fully aligned with EU sanctions on Russia and generally follows the strategic orientation of the broader Western community. The survey examines to what extent citizens agree with this direction.

The findings show nuanced but telling preferences:

- 47% support *partial alignment* with the West—maintaining a Western orientation while safeguarding specific national interests.
- 30% believe that North Macedonia should pursue a *completely independent* foreign policy.
- 23% support *full alignment* with Western foreign policy positions.

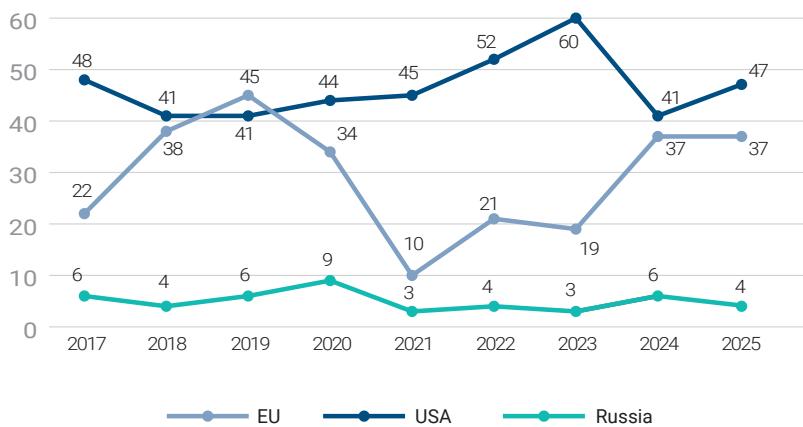
## Do you agree with the following: (2023-2025)



This division is further reflected in how citizens perceive the country's geopolitical identity. While 47% continue to see North Macedonia as part of the "Western world," 38% emphasize an "independent" stance. The increase in the perception of belonging to the West, compared to previous years, may be linked to heightened global insecurity and the perceived need for reliable alliances.

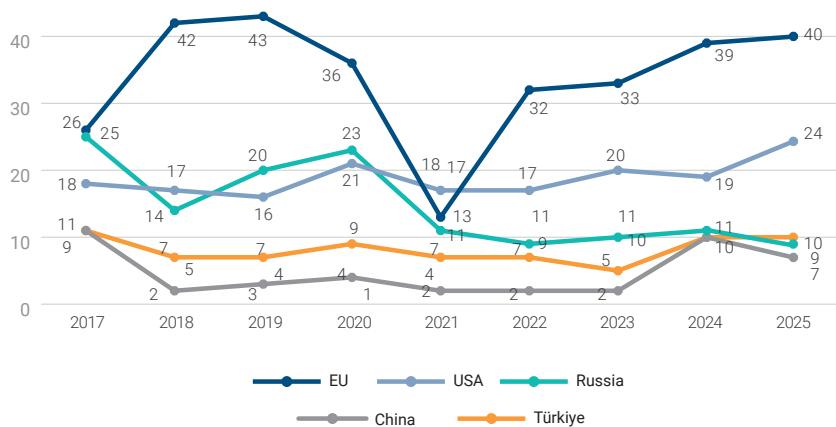
Two long-standing questions in the survey track public perceptions of North Macedonia's most influential foreign actor and its closest ally. Over the past nine years, several patterns stand out.

#### In your view, which external factor has the greatest influence in our country? (2017 - 2025)



Perceptions of the United States as the greatest influence on the country have continued to rise, increasing by 6 percentage points since 2024. Meanwhile, views of the EU as the leading actor of influence remain stable, preserving the significant jump observed last year. Throughout the entire period, the perception of Russia's influence remains consistently low, demonstrating limited public resonance despite intensifying global geopolitical competition.

#### In your opinion, who would be the greatest ally of our country? (2017 - 2025)



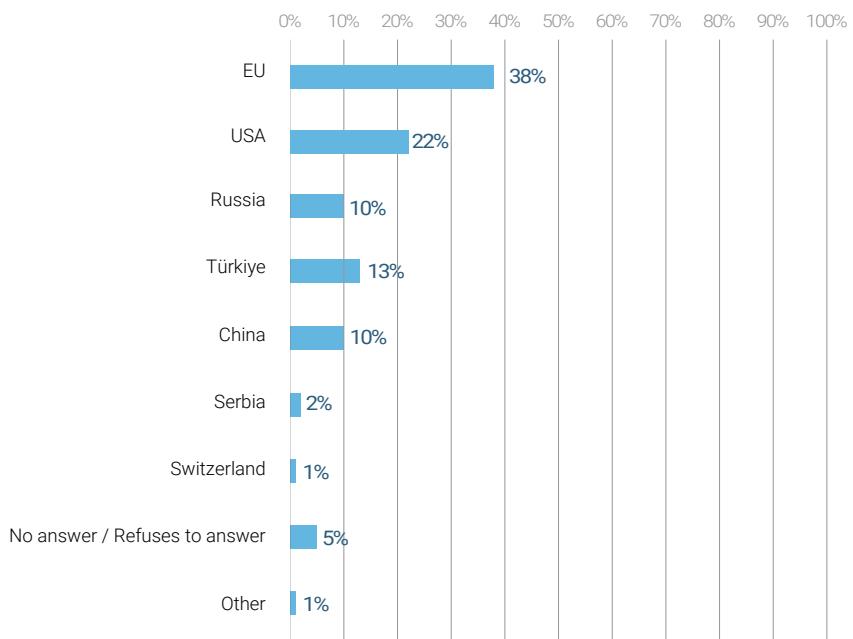
When it comes to identifying the best ally, the EU maintains its long-standing position as the most trusted partner. However, there is a modest increase in citizens naming the United States as North Macedonia's best ally, likely reflecting the heightened diplomatic visibility and intensified bilateral interactions that followed the political transition in Washington and the renewed focus on Western Balkan stability.

# The Economic Course in Times of Challenges

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In 2025, the economy faced a set of complex challenges, ranging from fiscal pressure and inflationary fluctuations to reduced inflows of foreign direct investments. The government's measures to stimulate economic activity and its economic-diplomatic moves aimed to ensure stability and create conditions for long-term growth. Economic issues are of essential importance to citizens. For this reason, the research focuses on economic partnerships through questions posed over the past seven years, enabling longitudinal monitoring.

## Who do you think should be the main economic partner of our country?

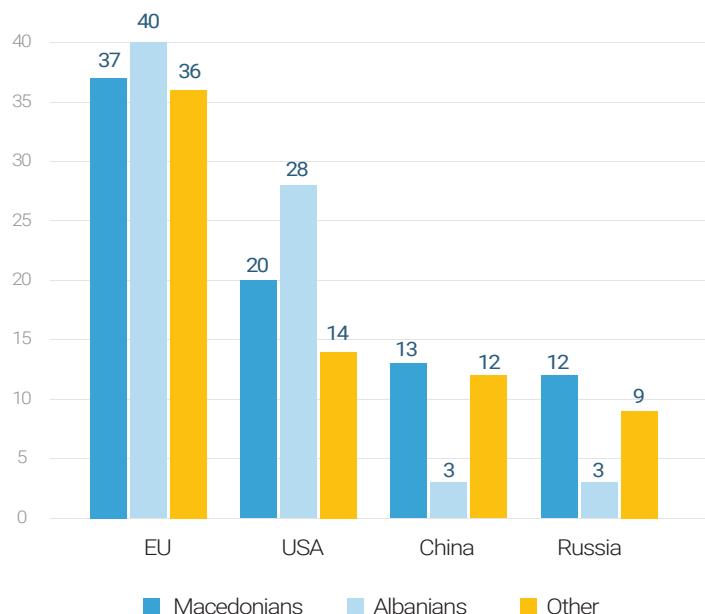


In 2025, citizens expressed the highest level of trust in the European Union as the country's key economic partner, with 38%, followed by the United States with 22%. The EU's dominant role reflects not only the country's Euro-integration aspirations but also its trade dependency on EU member states, while the high trust in the United States confirms the significance of the transatlantic connection and the impact of American support on economic and political development. After the EU and the U.S., Turkey stands out as an important partner with 13%, followed by China and Russia with 10% each. Compared to 2023 and 2024, citizens' trust in the European Union as the country's main economic partner remains largely the same: 38% in 2023 and slightly lower, 33%, in 2024. Trust in the United States as the main economic partner increased from 15% in 2023 to 22% in 2024, and remained at the same level in 2025.

This level of trust expressed by citizens does not differ from the actual situation. Namely, in the period January–September 2025, the EU accounted for 59.6% of the country's total trade exchange.

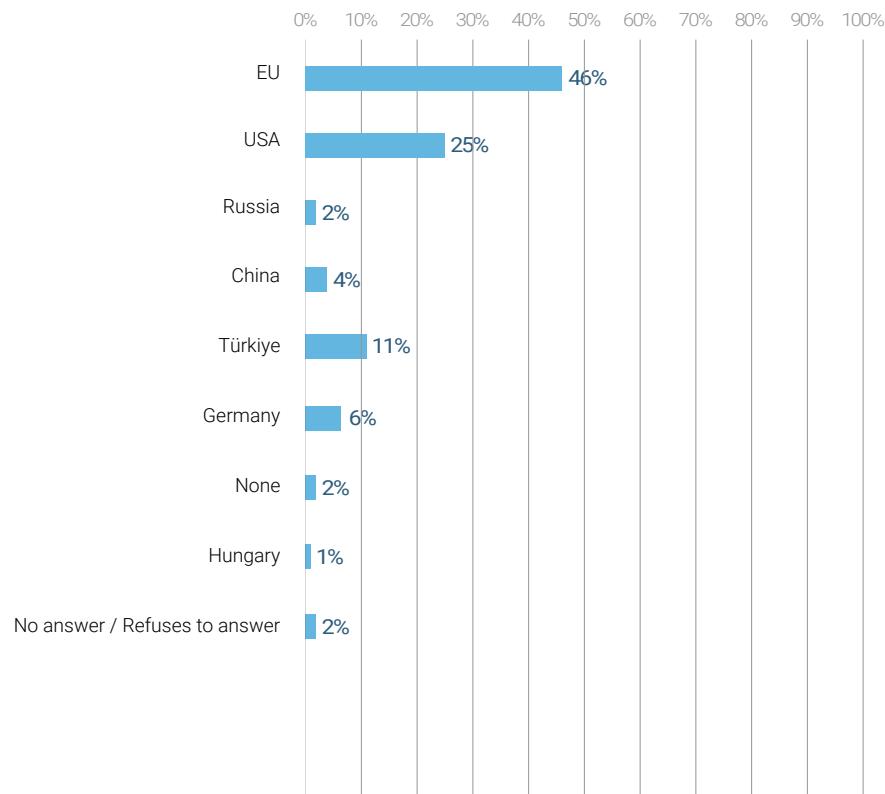
This shows that the high level of citizens' trust in the EU and the USA is consistent with the actual economic dependence and trade cooperation, which further underscores the rationale behind their role as the country's key partners.

#### Who do you think should be the main economic partner of our country? (ethnic affiliation)



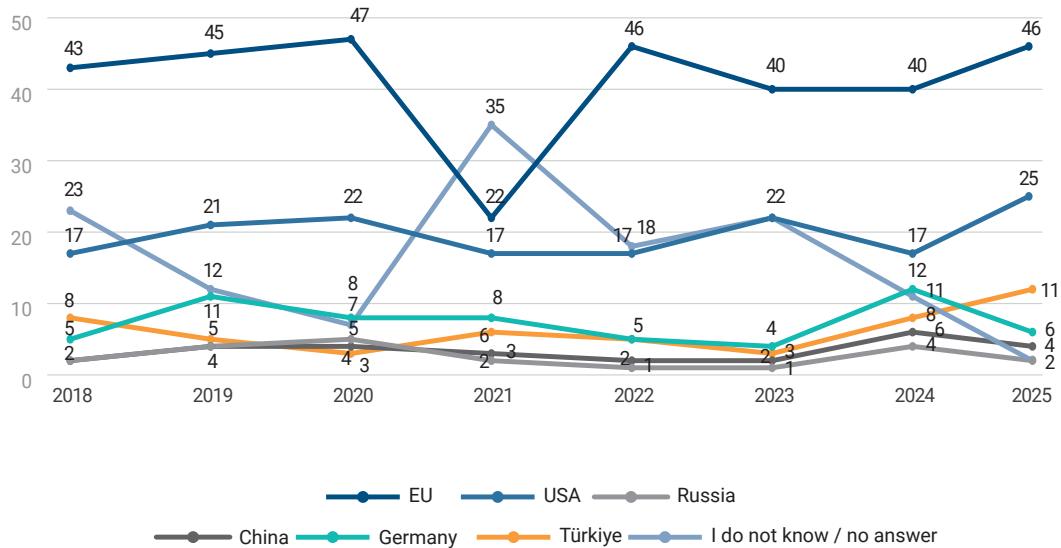
From the perspective of ethnic affiliation, both ethnic Macedonians and ethnic Albanians perceive the EU and the USA as the main economic partners of the country. Among ethnic Macedonians, trust in the EU as the main economic partner stands at 37%, and in the USA at 20%. Ethnic Macedonians also perceive China as a main economic partner with 13% and Russia with 12%. The Albanian ethnic community likewise identifies the EU as the state's main economic partner with 40%, followed by the USA with 28%, while China and Russia are perceived as main partners by only 3% each.

### Who is the largest donor (providing development funds) in North Macedonia?



The largest share of respondents, 46%, consider the European Union to be the country's biggest donor, followed by the United States with 25%, Turkey with 11%, and Germany with 6%. Data from previous years show a stable perception of the EU's role, with 40% of respondents identifying it as the main donor in both 2023 and 2024, increasing to 46% in 2025. Perceptions of the United States as a donor fluctuate, from 22% in 2023, decreasing to 17% in 2024, and rising again to 25% in 2025.

### Who is the country's largest donor (providing development funds)? (2018 - 2025)



The continuous support of the EU is also evident in practice. In July 2025, a multiannual financing decision was adopted under the EU Instrument for Pre-accession Assistance (IPA III) 2025–2027, allocating 67 million euros for North Macedonia. This complements the support from July 2024, when three financing decisions were adopted totaling 160 million euros for the operational programs for transport, environment, and human capital for the period 2024–2027.

# Conclusion

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In 2025, public opinion in North Macedonia reflects a complex mix of optimism, skepticism, and geopolitical recalibration. While domestic debates revolve around constitutional amendments and bilateral obstacles, citizens continue to view EU membership as the country's strategic anchor in an increasingly uncertain global environment. The survey shows strong support for integration, but also growing frustration with external conditionality, particularly the terms of the negotiation framework.

Internally, citizens prioritize reforms that correspond almost directly to the EU Growth Plan: environmental protection, judicial integrity, anti-corruption, and the adoption of EU standards. Yet awareness of the Growth Plan itself remains low, revealing a communication gap that prevents the public from linking reforms to their tangible benefits.

Geopolitically, citizens do not articulate a unified foreign-policy agenda. Migration, security, human rights, and climate action compete for priority, reflecting a crowded and often contradictory national discourse. Still, the country's strategic orientation remains Western: most respondents see North Macedonia as part of the Western world and prefer partial or full alignment with EU foreign policy. Across all longitudinal indicators, the EU and the United States retain their positions as the most trusted allies, most influential partners, and most relevant economic actors. Russia, despite global turbulence, continues to rank low in perceived influence and partnership. The overall picture is that of a society navigating global shifts but maintaining a steady commitment to the EU path, even when the road is long, conditions are contested, and public trust in fairness fluctuates.

## Information about KAS

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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

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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

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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.

## Contact information about IDSCS

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