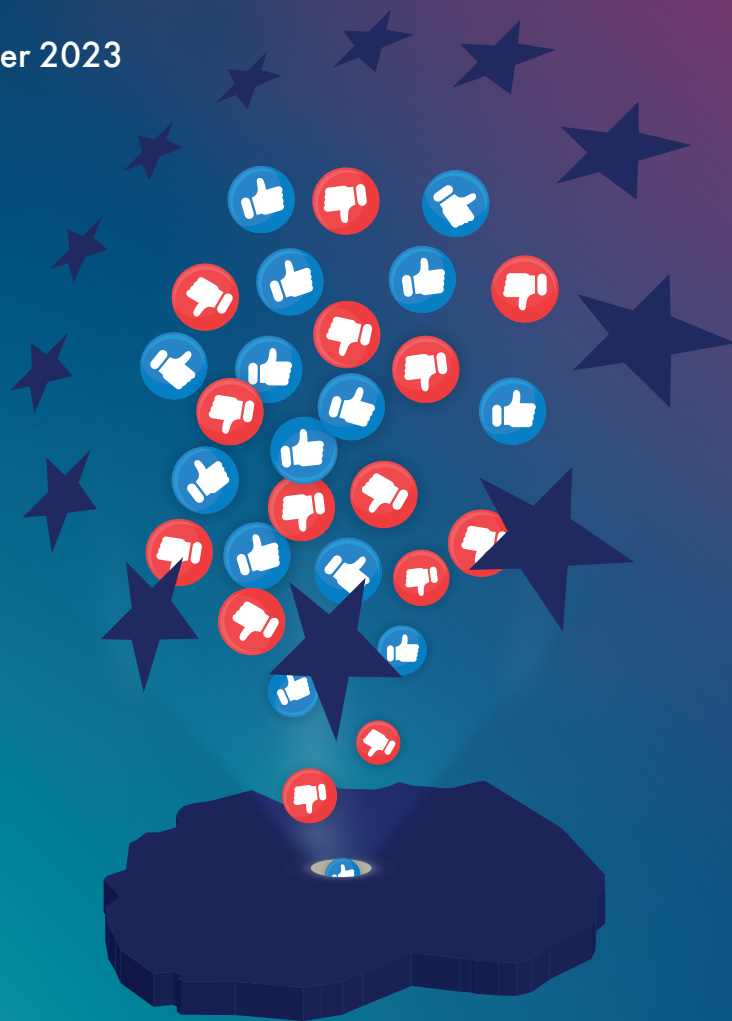


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Analysis of public opinion on North Macedonia's accession to the European Union (2014-2023)

Author: Ivan Damjanovski

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Impressum

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Author: Ivan Damjanovski

Translator: Gordan Tanaskov

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Summary of results

- The encouraging trends for EU enlargement and the accession perspectives of the region didn't have a positive effect on the support for EU membership in the country.
- In 2023, 60% of the Macedonian population support the country's perspectives for EU membership, the lowest percentage of support to date.
- The decline of the support for EU membership didn't have any effects on the Eurosceptic attitudes of the population as only 12% of the population is openly Eurosceptic.
- The population of undecided and apathetic respondents in the past three years has grown to roughly 30%.
- There is a considerable gap between the two largest ethnic communities, the ethnic Macedonians and the ethnic Albanians in the country in the levels of support for EU membership.
- 57% of ethnic Macedonians support EU membership.
- A significantly higher percent of Albanians (78%) are in favour of EU membership.
- There is a growing number of undecided respondents within both ethnic groups.
- Respondents with higher education and high income tend to be more supportive for the country's membership in the EU.
- Only 53% of the young population (18-24 years) is supportive of EU membership.
- EU membership is highly important for 40% of the population.
- For 20% of the population, EU membership is not important at all.
- The ethnic Macedonians in general are more pessimistic and critical of the accession process when compared to the ethnic Albanians.
- 66% of the population thinks that the country is not ready for EU membership.

- The general population lacks comprehensive knowledge of EU's conditionality mechanisms and due to information deficits is not capable to provide a realistic and consistent evaluation of the compliance record of the country.
- A slight majority of the population has detected at least some progress in the accession process in 2023.
- More than a third of the population shares the opinion that there has been no progress at all in the accession process.
- 44% of the population thinks that the country's inability to provide a satisfactory track record of reforms has become the most important reason why the country cannot obtain EU membership.
- One third of the population believe in the more realistic perspective of North Macedonia becoming a member of the EU within the next 10 years.
- One third of the population is pessimistic and doesn't believe that the country will ever become a member of the EU.
- Economic expectations continue to be the main determinants for the support of EU membership.
- Majority of respondents that support North Macedonia's EU membership base their preference on the anticipation of future material gains from the European integration process.
- The most frequent reason for the decision to support EU membership is the expectation that it will improve the standard of living in the country in the future.
- A significant part of the population continuously bases its support for EU membership on non-materialist expectations.
- A relatively low number of respondents (13%) base their support for EU membership on the predicament that EU membership would improve the quality of democracy in the country

- Majority of the population believes that the biggest positive effects of the EU integration process will come in the economic domain.
- 90% of respondents does not believe that North Macedonia's EU membership will reduce the emigration of the young population abroad.
- Identity and value-based factors are key determinants of Euroscepticism.
- The support for EU membership among SDSM supporters fully reflects the cues of the party leadership, and is 90%
- The percentage of Eurosceptic attitudes among VMRO-DPMNE supporters is declining.
- More than a third of the VMRO-DPMNE supporters are either undecided (20%) or wouldn't vote at a hypothetical referendum for membership in the EU.
- There are significant disparities between the perceptions of the supporters of the two largest political parties on the state of the EU accession process.
- 93% of SDSM voters think that the country has progressed in the European integration process in 2023. 70% of VMRO-DPMNE supporters believe that the country has not progressed at all or that it has regressed in the past year.
- While 60% of SDSM voters share the opinion that the country is ready for EU membership, more than 83% of VMRO-DPMNE supporters believe in the opposite.

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 data bases 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 Macedonian EU accession process which are addressed in every annual survey, and whose measurement is obtained by utilization of identical batteries of survey questions. 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 Macedonian EU accession process 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

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

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.

² For a wider theoretical explication of the model, cf. *ibid*, pages 13-24

About the survey

This public opinion analysis on the Macedonian process of accession to the European Union conducted in 2023 is a continuation of the research done in 2014, 2016, 2017, 2018, 2019, 2020, 2021 and 2022. 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 a public opinion survey research conducted in November 2023 on a sample of 1000 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 the 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 nine years. In addition, the questionnaire for this year's research has been slightly updated with the introduction of one completely new question and amendments of 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 2014-2023.

General trends

The low credibility of North Macedonia's EU accession perspective in the past decade has been the key factor behind the continuous decline of public support for EU membership in the country. These trends were initiated by the long-lasting Greek blockade of the accession process based on the name dispute between the two countries. Whilst the lifting of this blockade which came as a result of the ratification of the Prespa agreement in 2019 was supposed to give a new impetus to the accession process, this enthusiasm was short-lived. The anticipated start of the accession negotiations between North Macedonia and the EU was initially blocked in 2020 due to the French demands for a more comprehensive reform of EU's enlargement policy, which were eventually met with the adoption of the "New methodology" on EU enlargement by the European Council in March 2020. However, this didn't unlock North Macedonia's progress in the accession process, as towards the end of 2020, the start of the accession negotiations was blocked once again, this time as a consequence of a Bulgarian veto on the adoption of the EU negotiation framework with North Macedonia due to a new bilateral dispute based on questions of national identity, history and language. The developments in 2021 have had an ambiguous effect on the Macedonian accession process. A way out of the deadlock was presented in June 2022 by the French Presidency of the EU Council in a controversial document, dubbed the French proposal. The document envisaged the lifting of the Bulgarian blockade conditioned with several concessions in regard to Bulgarian demands, most notably the inclusion of a Bulgarian minority in the Macedonian Constitution and the introduction of hate-speech legislation related to the treatment of the forementioned minority group. In July 2022, the Macedonian government decided to approve the French proposal despite a string of massive popular rallies in Skopje against the proposal and fierce disapproval from the opposition political parties and criticism from civil society organizations and parts of the expert public. These developments have temporarily put the accession process back on track, as the adoption of the French proposal enabled the start of the accession negotiations with the initiation of the screening process.

In addition, the credibility of the accession prospects of the Western Balkan countries has been enhanced by the recent geopolitical developments in Europe which came as a consequence of the war in the Ukraine. The war sparked a new impetus for EU enlargement in EU circles and within the EU member states. This reinvigorated interest in EU enlargement provoked serious discussions on the possibilities for EU membership of the Western Balkan candidates by the end of the decade and

induced the EU Commission to come up with an ambitious Growth plan for the Western Balkans aiming at accelerated EU integration of the region.

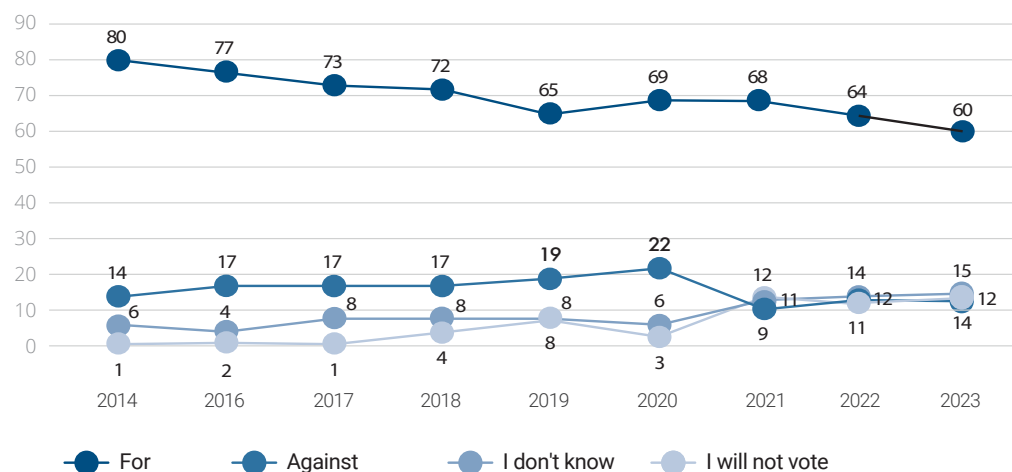
On the other hand, domestically the progress in the accession negotiations has been conditioned with amendments of the Constitution aiming towards recognition of Bulgarian minority, which, despite several attempts in 2023, couldn't garner support from the opposition parties whose votes are necessary to meet the threshold for Constitutional changes.

However, the encouraging trends for EU enlargement and the accession perspectives of the region didn't have a positive effect on the support for EU membership in the country. In 2023, 60% of the Macedonian population support the country's perspectives for EU membership. These results constitute a drop of 4 % compared to the previous year and mark the lowest percentage of support to date. The most probable reason for the recent decline in support for EU membership is the ongoing deadlock in the accession process which comes as a consequence of the dispute with Bulgaria. However, similar to the trends in the previous two years, the decline of the percentages of support for EU membership didn't transfer into Eurosceptic votes. As can be seen in graph 1, the percentage of Eurosceptic respondents remains low (12%). At the same time, we can detect a steady percentage of the population of undecided and apathetic respondents, which in the past three years has grown to roughly 30%.

The tendency of growing inter-ethnic gaps in the level of support for EU membership among the ethnic Macedonians and the ethnic Albanians which has been evident in the past decade, is also visible in the results of the 2023 survey. While a slight majority of the ethnic Macedonians (53%, 4% less than in 2022), support the country's aspirations for EU membership, the support among the ethnic Albanians is significantly higher at 78%. However, in a similar distribution of attitudes as with the general results, the decline of support for EU membership among the ethnic Macedonians does not have a significant effect on Eurosceptic attitudes among this cohort, as the percentage of the openly Eurosceptic ethnic Macedonians is only 14%. Similar to previous years, there is a growing number of undecided respondents within both ethnic groups.

Finally, educational achievement and income continue to be the most indicative positive predictors of support for EU membership. On the other hand, only 53% of the young population (18-24 years) is supportive of EU membership. Together with the group of middle-aged respondents (45-54 years) they constitute the largest category of undecided citizens.

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?



The results from the 2023 survey indicate towards a notable shift in some of the attitudes towards the question how much EU accession is personally important for the respondent (table 1). The biggest change in comparison to the results from 2022 is evident among the respondents that attach a very high importance to the prospect of EU membership. Thus, in 2023, EU membership is highly important for roughly 40% of the population, which is a decline of 15% compared to the previous year. In contrast, the population for which EU membership carries no importance at all has grown to almost 20%. The previously mentioned inter-ethnic gap is also evident in the distribution of attitudes in this section. Thus, EU membership is highly important for roughly half of the ethnic Albanians, compared to 32% of ethnic Macedonians who share the same sentiment. For 23% of the ethnic Macedonian respondents, North Macedonia's bid for membership in the EU is not important at all.

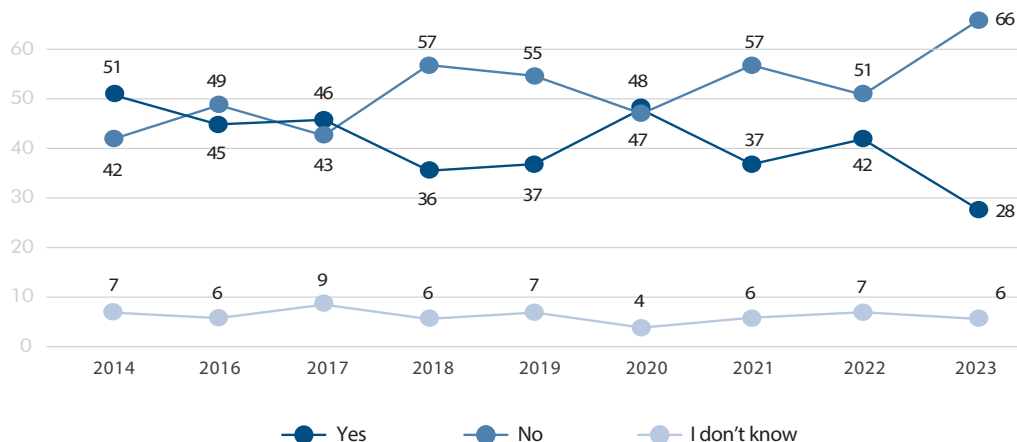
³ As the decimal numbers were rounded off, the total may not be 100% (this remark applies to all graphs and tables).

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

A large shift in respondent opinion is evident regarding the assessment of North Macedonia's preparedness for EU membership. 66% percent of the population shares the opinion that the country is not ready to become a member of the Union. These results mark a significant shift in public opinion on this issue, as this distribution of attitudes is 15% higher than the previous year. It also constitutes the highest value of dissatisfaction with the level of preparedness within the whole longitudinal dataset. At the same time, the percentage of respondents that think that the country is ready for membership has conversely dropped from 42% in 2022 to 28%, which is the lowest value within this variable to date. The divergent distribution of attitudes among the two biggest ethnic groups in the country is also evident in this case. The ethnic Macedonians tend to be more skeptical, as 70% of respondents within this group think that the country is not ready for membership. On the other hand, roughly 40% of the ethnic Albanians are convinced of the opposite. As can be seen in graph 2, there is a notable inconsistency in the longitudinal distribution of data, which further confirms the argument on the lack of popular knowledge and information deficits on the mechanisms of the accession process and EU's assessment of the country' progress in the integration process.

Graph 2. ⁴ Do you believe that North Macedonia is ready for EU membership?



On the other hand, we can detect a more coherent distribution of results in the past three years regarding the country's annual progress in the EU integration process. A majority of the population has detected at least some progress in the accession process in 2023 (table 2). While only 6% think that the country has progressed a lot in the past year, 22% believe that the country has somewhat progressed, with additional 24% that think that there was limited progress. On the contrary, 35% of the respondents have not detected any progress at all, while 10% of the population thinks that the country has regressed in the accession process. Similar to the analysis of the previous questions, the tendency among ethnic Macedonians to have a more pessimistic outlook on the country's EU integration performance is confirmed in this case as well. Thus, a majority of respondents within this demographic category think that either there was no progress at all or that the country has regressed in the EU integration process. On the other hand, less than 30% of the ethnic Albanian respondents share the same sentiments, while roughly 70% are convinced that there was some progress in the accession process in the past year.

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 1%

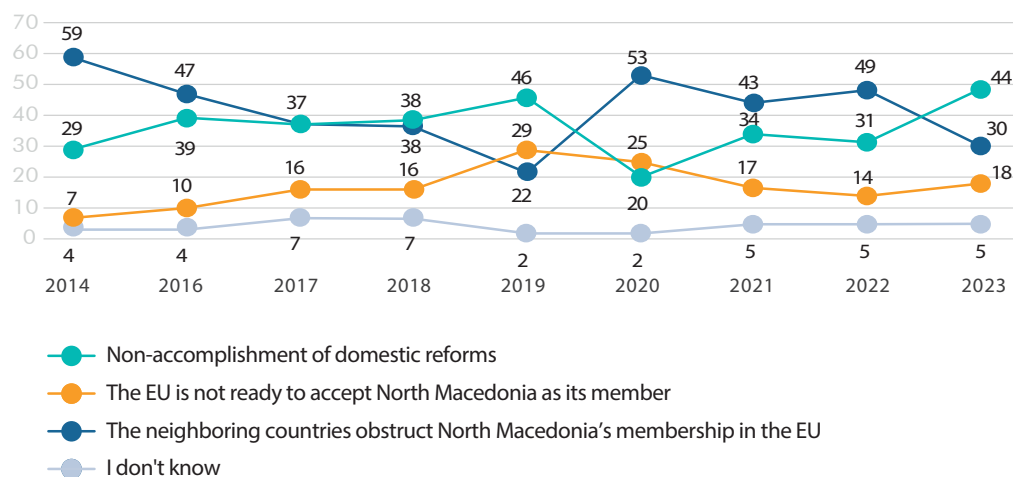
Table 2

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

Another significant shift in the Macedonian public opinion can be observed among the perceptions on the biggest obstacles to the country's EU membership prospects. In the previous three years, there has been a consistency in opinions directing towards the obstructions from the neighboring states as the biggest culprit for the lack of progress in North Macedonia's accession to the EU. These sentiments have been based on the present and previous cases of blockings of the accession negotiations by neighboring countries which are members of the EU. However, in 2023 we detect a significant declination of roughly 20% in the population that indicates the obstructions from neighboring countries as the main obstacle to EU membership. While in 2022, almost half of the population shared that sentiment, in 2023 this number has dropped to 30%. On the other hand, the results from the 2023 survey pinpoint the domestic performance in compliance with EU conditionality as the biggest obstacle in the accession process. Thus, 44% of the population thinks that the country's inability to provide a satisfactory track record of reforms has become the most important reason why the country cannot obtain EU membership. Finally, less than 20% of

the population blame EU's unwillingness to accept the country within its ranks as the principal factor why the country is still not a member of the EU. In regard to the demographic distribution of attitudes, there is a consistency with the general results across all demographic categories.

Graph 3 . ⁵ In your opinion, what is the main reason why North Macedonia is still not a member of the EU?



Lastly, in the past two years a more realistic outlook is observable in regard to public projections on the possible time-frame for North Macedonia's full membership into the EU (table 3). Thus, there is a decline in the rather unrealistic expectations that North Macedonia could become a member in the next three to five years. Although this opinion is still shared by roughly 20% of the population, this is significantly less than the trends prior to 2021. On the other hand, one third of the population believe in the more realistic perspective of North Macedonia becoming a member of the EU within the next 10 years. Additional 11% share the opinion that the country will become a member of the EU within the next 20 years. In contrast, one third of the population is pessimistic and doesn't believe that the country will ever become a member of the EU. This pessimism is particularly emphasized among the ethnic Macedonian respondents, whereby almost 40% within this cohort assume that the country will never obtain EU membership.

⁵ 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 2%

Table 3

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

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 bases 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 egoist 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 materialist gains that will benefit the Macedonian society as a whole and not necessarily themselves personally.

These assumptions are again largely confirmed by the results of the 2023 survey. As noted in table 4, a majority of the population indicates economic factors as principal predictors of their support for EU membership. Since the initial survey in 2014, the expectations of improved standard of living have been consistently the most frequent determinant of support for EU membership. In 2023, this reasoning has been shared by 25% of the population. Additional 15% would vote for EU membership because of the belief that it will bring easier access to jobs abroad, while 14% attach their support for EU membership with expectations of reduced unemployment. In this sense, the cumulative sum of percentages of respondents who base their support for EU membership on materialist expectations slightly exceeds 50% of the population. On the other hand, non-materialist factors as predictors of support for EU membership have gained importance in the past five years. Thus, almost 20% of the respondents base their support of EU membership on the expectation that it will improve the security and the stability of the country, while 14% believe that North Macedonia belongs to the "European family of countries".

A relatively low number of respondents (13%) base their support for EU membership on the predicament that EU membership would improve the quality of democracy in the country.

Table 4

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

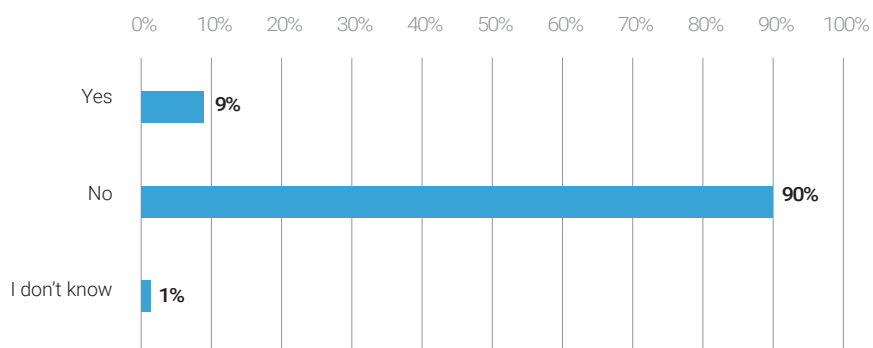
Economic predictors are also most frequently favored among perceptions on the societal areas which would be most positively affected by North Macedonia’s membership in the EU (table 5). The highest portion of respondents (19%) expect that future membership in the EU will most positively influence the quality of life as a whole. In addition, 18% of the population pinpoints economic development as the area which would generate most positive gains from EU membership, while 14% expect further reduction of unemployment. In contrast, non-material expectations are less frequent. Thus, only 12% expect positive gains in the area of human rights and freedoms. An equal number of respondents identify increased stability as the most important benefit from EU membership, which is 5% less than the previous year.

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 %
Economic development	23	25	25	20	18	19	19	21	18
Stability	13	15	15	13	14	12	13	17	12
Reduction of unemployment	23	18	21	19	20	21	15	17	14
Human rights and freedoms	12	9	12	14	12	11	12	12	12
Improvement of infrastructure	6	5	5	9	11	13	11	9	13
Quality of life as a whole	16	18	11	13	17	16	15	18	19
Strengthening of national identity	3	4	4	7	3	5	9	6	7
Other	1	3	2	1	2	2	3	0	2
I do not know	3	3	6	3	3	1	2	0	4

Finally, within the framework of this year's (2023) survey, we have introduced a new variable that aims to measure public perception on the problem of excessive migration of the young population and brain drain in North Macedonia. Despite popular expectations of positive economic gains from the processes of European integration, a massive majority of the population does not believe that EU accession will prevent the progression of depopulation and emigration of the young population in the country. A staggering number of 90% of respondents does not believe that North Macedonia's EU membership will reduce the emigration of the young population abroad (graph 4).

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

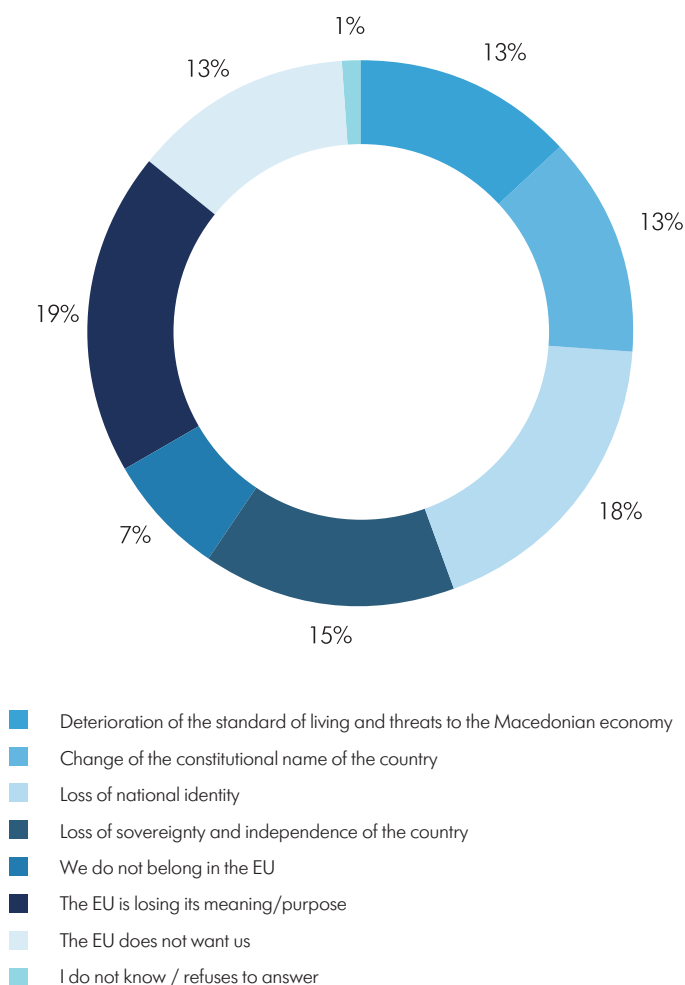


Identity and value-based factors

Whilst material factors have been established as the primary predictors of support for EU membership in North Macedonia, the longitudinal analysis indicates towards a tendency of consolidation of identity and value-based factors as principal determinants in the formation of Eurosceptic attitudes among the Macedonian public. Thus, identity and value-based factors such as perceptions of cultural threats that stem from the supranational character of the process of European integration or fear of loss of sovereignty as an eventual outcome of the accession process have been gradually imposed as key determinants of opposition towards EU membership.

These arguments are confirmed in the results of the 2023 survey (graph 5). The analysis of the attitudes of the Eurosceptic respondents indicates that only 13% within this group base their opposition to EU membership on economic grievances, i.e. expectations of deterioration of the standard of living and threats to the Macedonian economy. In contrast, a majority of the Eurosceptic respondents indicate various aspects of cultural threats as the principal factors for their opposition towards EU membership. Thus, loss of national identity (18%), loss of sovereignty and independence of the country (15%) and the change of the constitutional name of the country (13%) are among the most frequent predictors of opposition to EU membership among the Eurosceptic respondents. A relatively high percentage of respondents (20%) don't support EU membership due to the belief that the EU is losing its meaning and purpose.

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



In 2023, a slight shift in public opinion can be seen in the self-perception of the Macedonian population in relation to their identity. While in 2022, the controversies with North Macedonia's accession process and the introduction of another set of conditions based on questions of national identity had a probable effect on the significant rise of individuals that declare exclusive identity, in 2023 the percentage of this category of respondents has dropped to 71% which is 6% less than the previous year (table 6). Conversely, the number of respondents that declare a dual identity, i.e. ethnic and European, has risen to 20%. The number of respondents that put their European identity first or have self-perceptions of exclusive European identity remain insignificant (3% and 4% accordingly).

Table 6

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

However, in 2023 there is a discrepancy with the longitudinal trends established in the previous surveys, where there was no significant correlation between the declaration of exclusive ethnic identity and Euroscepticism, as the distribution of attitudes among this category has been very similar to the general distribution. Namely, those respondents who declare exclusive ethnic identity are less enthusiastic about EU membership compared to previous years as 50% from this group openly support EU membership, which is for example 10% less than the previous year. Similar to the trend in the general distribution of attitudes indicated in graph 1, this declination in support, didn't transmit into Eurosceptic votes, but rather has resulted into increased percentages of undecided voters.

Cues from political parties

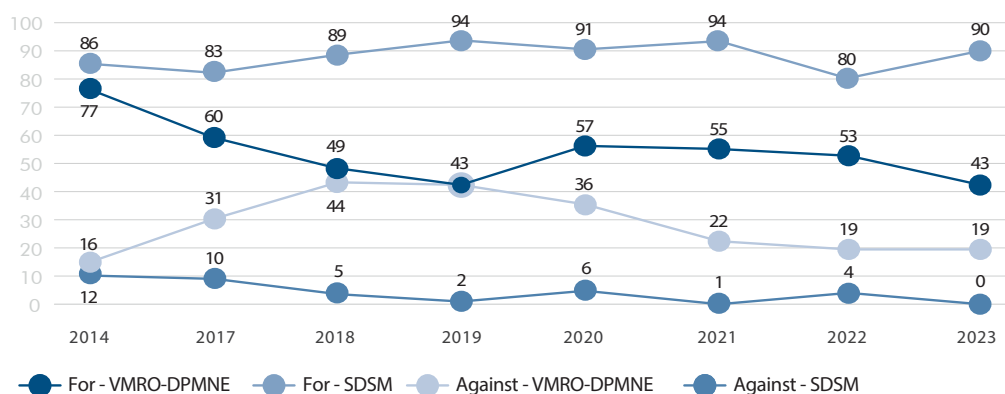
Finally, we measure the impact of cues from political parties as factors of attitude formation regarding the European integration process in North Macedonia. The role of party cues as predictors of public opinion is based on the hypothesis that due to informational deficits on complex political processes 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 confirms the party cue hypothesis.

Throughout the time period 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. On one hand, the biggest political party in the ruling coalition, SDSM, has been continuously placing European integration as the highest priority on its political agenda. In this sense, progress in the accession process and the start of accession negotiations have been the driving force behind the government's decision to accept the 'French proposal' and pursue compliance with the conditions set by the proposal despite widespread criticism from the opposition parties and some civil society organizations. On the other hand, the main opposition party, VMRO-DPMNE, which is also a strong supporter of the country's accession to the EU, has however been very critical of the concessions that the government has made in relation to the Bulgarian demands and the conditions laid out in the 'French proposal'. To this end, the official position of the party is that it won't support the constitutional changes regarding the inclusion of the Bulgarian minority in the Constitution as the key EU demand for further progress in the accession negotiations until there are firm guarantees from the EU that the accession process will not be burdened with additional conditions and obstructions from the Bulgarian side.

Based on these developments, 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 their opposition of the French proposal. This assumption is confirmed by the results from the 2023 survey (graph 6). Compared

to 2022, there are divergent shifts in opinions in the two party camps. The dip in support for EU membership in 2022 among SDSM supporters appears to have been temporary, as the percentage of SDSM sympathizers that support EU membership has increased by 10% reaching an extremely high threshold of 90%. In contrast the number of VMRO-DPMNE sympathizers that support EU membership is much lower at 43%, which is 10% less than the previous year. However, this decline in support didn't have any effects on the number of Eurosceptic VMRO-DPMNE sympathizers as the percentage of the VMRO-DPMNE supporters who openly oppose EU membership has remained the same as the previous year (19%). More than a third of the VMRO-DPMNE supporters are either undecided (20%) or wouldn't vote at a hypothetical referendum for membership in the EU (18%).

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



⁶ 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.

The opposing trends in opinions regarding the qualities of the accession process between the supporters of the two dominant parties in North Macedonia are also detectable in the distribution of attitudes across other variables covered in the survey. Similar to the previous two years, the ruling vs opposition party dynamics is reflected in a substantial divergence in the assessment of the progress achieved in the accession process in the past year. While a massive 93 % of SDSM supporters (27% more than the previous year) think that the country has progressed in the European integration process in 2023, 70% of VMRO-DPMNE supporters believe that the country has not progressed at all or that it has regressed in the past year. A similar variation in results can be observed in the assessment of North Macedonia's readiness for membership in the EU. Whereas 60% of SDSM voters share the opinion that the country is ready for EU membership, 83% of VMRO-DPMNE supporters believe in the opposite.

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

Контакт податоци за KAC

Address: Risto Ravanovski No 8,
1000 Skopje

Phone number: +389 2 321 70 75
+389 23 21 70 76

E-Mail: Skopje@kas.de

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.

Contact information about IDSCS

Address: Str. Miroslav Krlezha No.
52/1 /2, 1000 Skopje

Phone number: +389 2 3094 760

E-Mail: contact@idscs.org.mk

Information about the authors

Ivan Damjanovski is a professor at the Department of Political Science, Faculty of Law 'Iustinianus Primus', Ss. Cyril and Methodius University in Skopje. His research interests are focused on democratization, Europeanisation of candidate countries, EU enlargement, EU integration theory and ethnic identities.

