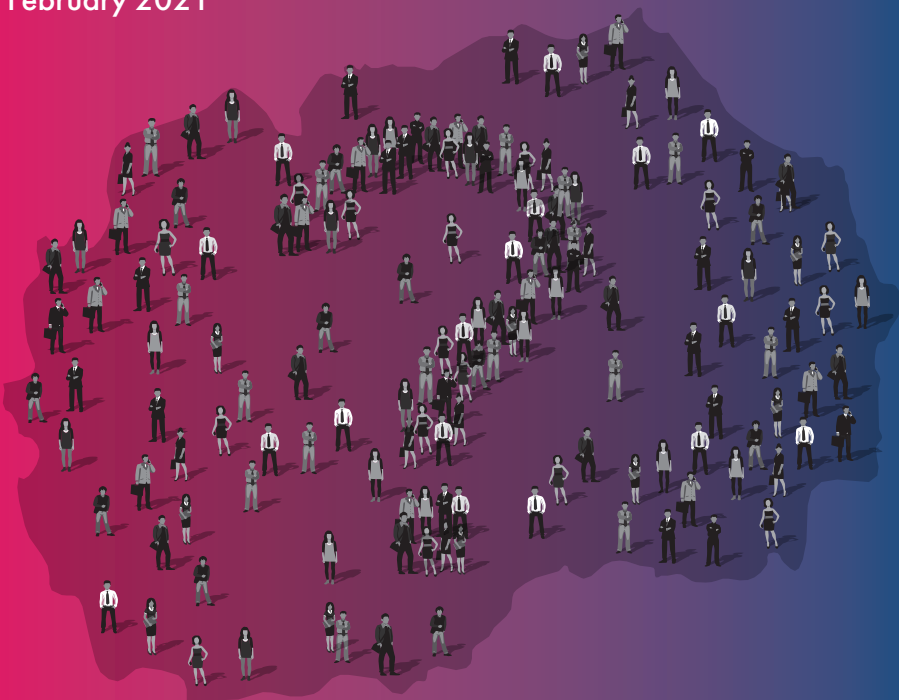


Public Opinion Analysis Paper No.02/2021

Political Rollercoaster. An eventful year for North Macedonia on its EU path

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Introduction

Since 2016, the Institute for Democracy and the Konrad-Adenauer-Foundation (IDSCS and KAS) have conducted a nationwide, representative opinion poll on questions relevant to the EU integration process of the country. While certain questions have remained the same over the years, others are accustomed to specific events of the corresponding year. That way, the research allows both comparative analyses of trends and changes in public opinion (the most significant of which are discussed further down), while also looking at the general attitude on relevant political occurrences of the recent year. In 2020, the public opinion analysis throws light at bilateral relations of North Macedonia with partner countries crucial to advancing on the prospect towards opening accession negotiations.

To understand the results of the poll and divergence in the Macedonian society better, the analysis tests relevant questions for 1) *political orientation/ partisanship* and

2) *ethnicity of respondents*. This allows drawing clean lines between different political and ethnic groups in the country, offering insights into the level of politicization among the general public.

The public opinion survey 2020 has been conducted between **11.11.2019** and **20.11.2020** and is based on a representative sample of **1006 respondents**. The survey has been conducted by telephone.

If your interest is sparked in the detailed analyses of previous years we invite you to give them a read at the IDSCS webpage.

Political context

In terms of EU integration, 2020, like 2019, was also a bitter-sweet year for North Macedonia. Overshadowed by the notorious outcomes of the COVID-19 pandemic which have been hitting the headlines ever since, the first half of 2020 will be remembered in the other news by North Macedonia's NATO membership and the green light for the start of the accession negotiations with the EU. The joy did not last for long nevertheless. Despite expecting to finally exit the 'eternal' waiting room, the country's EU membership prospects were once again postponed by Bulgaria's veto on the proposed negotiating framework and hence the accession

process itself, based on a dispute over national history, identity, and the Macedonian language.¹ Ironically, the veto came just after the two countries marked the end of their joint co-presidency with the Berlin Process in late November.

2020 was an election year for North Macedonia as well. Following the French 'non' from October 2019, Prime Minister Zoran Zaev resigned and an interim government tasked with carrying out the early parliamentary elections was appointed. After being postponed due to the coronavirus outbreak, the elections finally took place on July 15 resulting in a formation of the old-new government between the Social Democratic Union of Macedonia (SDSM), supported by the "We Can" coalition,² and

¹ Council of Ministers of the Republic of Bulgaria, "Ramkova pozitsiya odnosno razshiravane na ES i procesa na stabilizirane i asociirane: Republika Severna Makedonija i Albanija [Framework position on EU enlargement and the Stabilization and Association Process: Republic of North Macedonia and Albania]," October 2019, <https://www.gov.bg/bg/presentsentari/novini/ramkova-pozitsia>; Ivan Kolejkovski, "Bulgaria Objects to 'State-Sponsored Anti-Bulgarian Ideology' in North Macedonia," September 16, 2020, <https://mia.mk/bulgaria-objects-to-state-sponsored-anti-bulgarian-ideology-in-north-macedonia/?lang=en>.

² The „We Can“ coalition is formed by 25 political parties including SDSM, BESA, (operating in the Albanian bloc), the New Social Democratic Party (NSDP), the Liberal Democratic Party (LDP), the Party for a European Future (PEI), the United Party for Roma Equality (OPER), the Party for the Movement of the Turks in Macedonia (PDT), the Democratic Union of Vlachs in Macedonia (DSVM), the New Alternative (NA), the Party for Economic Changes 21 (PEP 21), the Party for Social and Economic Progress (POEN), the Democratic Union (DS), the Political Party "Dignity" (PPD), the Democratic Party of Turks in Macedonia, the Serbian Party in Macedonia (SSM), the Democratic League of Bosniaks, the Party of Pensioners (PP), the Party for Democratic Prosperity of the Roma (PDPR), VMRO-People's Party (VMRO-NP), Democratic Renewal of Macedonia (DOM), United for Macedonia (OM), the Party for Full Emancipation of the Roma in the Republic of North Macedonia (CER in RNM), and the Union of Roma in Macedonia. See more Marko Pankovski et al., "The Republic of North Macedonia's 2020 Parliamentary Elections Handbook Second Updated Edition" (Institute for Democracy "Societas Civilis" - Skopje and Konrad Adenauer Foundation, 2020), https://izbornaarhiva.mk/dokumentacija/priracnici/Priracnik_za_parlamentarni_izbori_2020_ENG.pdf.

the Democratic Union for Integration (DUI), the major party from the so-called Albanian bloc.³ The Internal Macedonian Revolutionary Organization – Democratic Party for Macedonian National Unity (VMRO-DPMNE) as the leader of the coalition ‘Renewal for Macedonia’,⁴ alongside with the Left Party, and the Alliance for the Albanians, and the Alternative (Alternativa) form the parliamentary opposition.⁵ It is noteworthy to mention that the Left Party made a debut in the Macedonian Parliament and, so far, is the only parliamentary party that opposes North Macedonia’s NATO membership and advocates for closer ties with Russia and China.⁶ Overall, with a turnout of 52.02%, these elections will be marked by a large decrease compared to the turnout of 66.79% at the last parliamentary elections in 2016.⁷

Both SDSM and VMRO-DPMNE, as major political parties, lost a significant number of seats.⁸ Consequently, the parliamentary majority is very tight with only 61 out of 120 MPs, often resulting in a lack of quorum.

The snap elections’ outcome, as well as the series of unfortunate events related to North Macedonia’s EU integration, have additionally entangled the country’s already fragile social fabric – suggested by the 2020 IDSCS and KAS Public Opinion Analysis too. As expected, the survey shows trends of further growing Euroscepticism, negative perception of the neighbours, taking into consideration primarily Bulgaria’s veto and the long-lingering name dispute with Greece, and political polarization across ethnic and partisan lines.

³ Ibid.

⁴ Ibid, the ‘Renewal for Macedonia’ includes the Citizen Option for Macedonia (GROM), the Movement for Turkish National Union, the Democratic Party of the Serbs in Macedonia, the Democratic Party of the Roma, the Democratic Forces of the Roma, Macedonian Action (MAAK), the New Liberal Party, the Party of the Vlachs from Macedonia, the Party of the United Democrats of Macedonia, the United Party of the Roma in Macedonia, the Workers’ Agricultural Party of Macedonia, the Socialist Party of Macedonia, the Serbian Progressive Party, the Party of Democratic Action of Macedonia, Tito’s Left Forces, as well as the independent candidates Adnan Arsovski, Adnan Kahil, Bajram Berat, and Salko Kuch.

⁵ Ibid.

⁶ Mahir Sijamija et al., “Foreign Authoritarian Influence in the Western Balkans” (Political Capital Policy Research & Consultancy Institute, 2020), 35.

⁷ Ibid.

⁸ Ibid.

General Trends

The trends that stood out in the 2019 public opinion analysis,⁹ are noticed this year as well. The first one is related to the attitude towards the EU membership prospect, while the other concerns the sentiments towards Russia as a potential ally and the non-Western rival powers as preferred economic aid providers of the country – a newly added category in this year's edition.

While the respondents still see the European Union as the best foreign ally of the country as shown in Chart 5, in comparison to the last year, the preference for this alliance decreased by 7.6% - the second lowest ranking since 2016. Furthermore, the EU is no longer seen as the foreign factor with the greatest influence, falling behind US again with the second lowest ranking since 2016 too. There is a slight increase in the perception of the EU as the greatest donor in the country. Yet, both the EU and all the stakeholders included (China, Russia and the EU) fall within the margin of error when looking at the most preferred sources of economic aid with little over one-third of the respondents choosing each of the two options.

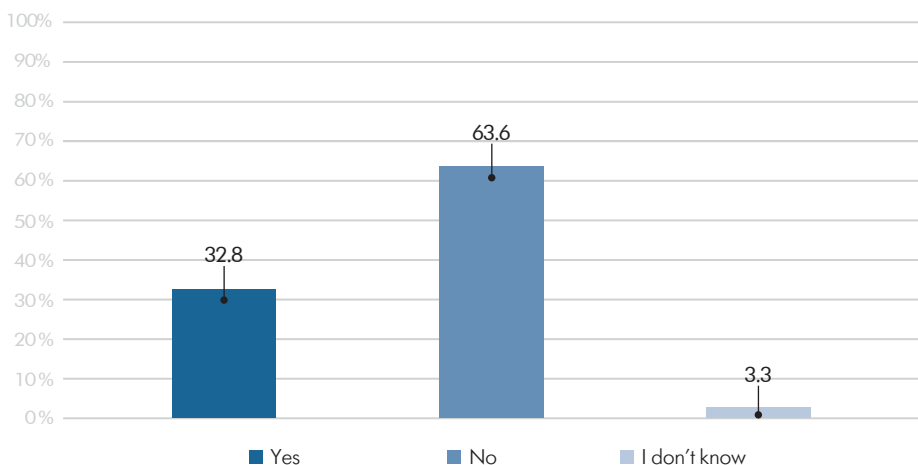
Compared to last year, predominantly the non-voters, but also VMRO-DPMNE and the Left Party supporters are turning eastwards with growing support for the Eurasian Union (EAU) as an alternative to the EU membership. For instance, if we take into account the past voting record, the increase in support for the EAU among VMRO-DPMNE electorate is from 39.8% in 2019 to 55.5% in 2020. In the case of the non-voters, the increase in support for the EAU is from 21.4% in 2019 to 43.8% in 2020. Furthermore, Russia has received the second best ranking as a foreign ally since 2016 with 23%, with a trend of growing support among ethnic Albanians and the parties from the so-called Albanian bloc. Moreover, the support for the EAU as an alternative to EU membership has increased by 13% from last year. On the other hand, the support for Turkey as North Macedonia's greatest foreign ally ranks second among the supporters of the Albanian opposition – the Alliance for Albanians and Alternativa. With the start of accession negotiations indefinitely postponed, one could expect that these numbers will grow.

One of the most counterintuitive findings is that Russia is the second most preferred economic aid provider among ethnic Albanians and the voters from the so-called Albanian political bloc.

⁹ See Ivan Nikolovski and Marie Jelenka Kirchner, "What Now? The Uncertainty of North Macedonia's EU Accession in 2019" (Skopje: Institute for Democracy "Societas Civilis" - Skopje, 2020), https://idsos.org.mk/wp-content/uploads/2020/02/A5_What-now-The-uncertaintyof-North-Macedonias-EUaccession-in-2019WhatENG-1.pdf.

Friends, foes and everything in between. Stress test for neighbourly relations

Chart 1. Do you expect that Greece will help the country in the EU accession negotiations process?



One way or the other, most respondents have a clear opinion on whether or not to expect help from Greece on their way into the EU. Two-thirds of the survey participants, a clear majority (63.6%), do not believe that the country will receive any help, with only one third (32.8%) being more optimistic regarding Greek

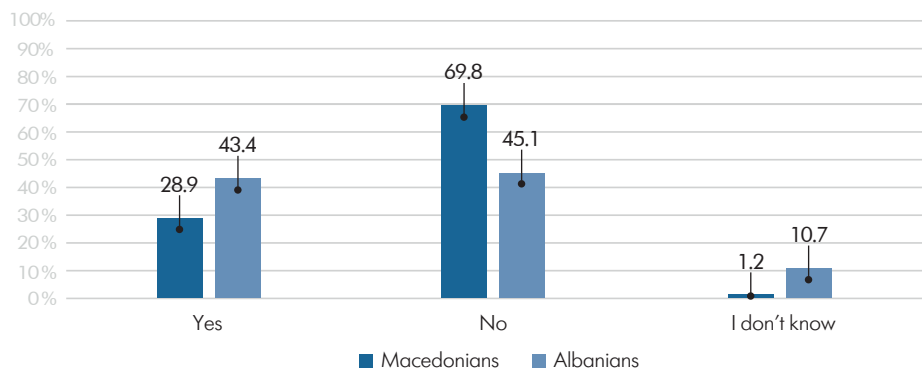
support. The results should come as no surprise given that the contentiousness of the name change persists among many Macedonian citizens, facing additional opposition from many socio-political actors and movements, but also from some mainstream political parties, such as VMRO-DPMNE and the Left Party.¹⁰

¹⁰ VMRO-DPMNE's leader Hristijan Mickovski stated that the party would accept the „reality“ but it will fight to correct the injustices that North Macedonia inherited with this agreement. For more information see 360 Degrees, “Mickoski za Prespanskiot dogovor: Nema da ja ignorirame realnosta, ama ke se borime da ja ispravime nepravdata [Mickoski on the Prespa Agreement: We won't ignore the reality but we will fight to correct the injustice],” February 5, 2020, <https://360stepeni.mk/mitskoski-za-prespanskiot-dogovor-nema-da-ja-ignorirame-realnosta-ama-ke-se-borime-da-ja-ispravime-nepravdata/>.

On the other hand, the findings may be analysed in the context of the improved post-Prespa bilateral relations. After signing the Prespa Agreement, North Macedonia and Greece committed to a strategic partnership, especially in terms of Skopje's Euro-Atlantic integration. Greece was the first country to ratify North Macedonia's NATO accession protocol. Furthermore, Athens has become a fervent supporter of North

Macedonia's EU membership and consequently approved the start of the accession negotiations, despite the government change and Kyriakos Mitsotakis's pre-election opposition to the Prespa Agreement.¹¹ It is also noteworthy to mention that the Hellenic Air Force F-16 fighter jets have been policing North Macedonia's airspace after the country joined the North-Atlantic Alliance.¹²

Chart 1.1. Do you expect that Greece will help the country in the EU accession negotiations process? (controlled for ethnicity)



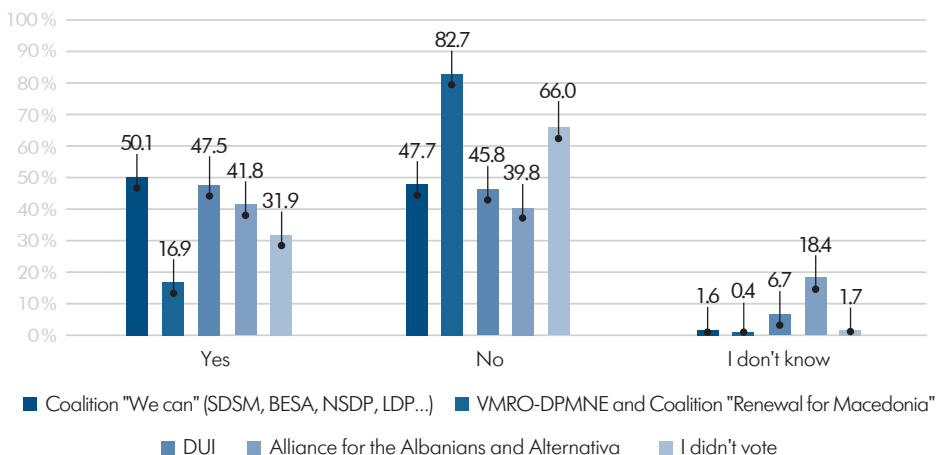
¹¹ Tom Ellis, "North Macedonia Decides Its Future," July 9, 2020, <http://www.ekathimerini.com/254511/opinion/ekathimerini/comment/north-macedonia-decides-its-future>; Government of the Republic of North Macedonia, "Od sredbata na premierite Zaev i Micotakis: Partnerstvoto zasnovano na doverba i prijatelstvo go transformiravme vo sojuzništvo so členstvoto na našata zemja vo NATO, a Grcija ostanuva silen lobist i poddržuvač na našata zemja [From the meeting of PMs Zaev and Mitsotakis: We have transformed the partnership based on trust and friendship in an alliance with our country's membership in NATO, while Greece remains a strong lobbyist and supporter of our country]," September 16, 2020, <https://vlada.mk/node/22499>; Government of the Republic of North Macedonia, "Prime Minister Zaev met with Greek Prime Minister Mitsotakis in New York: Maximum focus on building partnership for a prosperous region in the interest of the citizens of both countries," September 24, 2019, <https://vlada.mk/node/19120?ln=en-gb>.

¹² Tom Ellis, "Greek F-16s Protect North Macedonia," June 2, 2020, <http://www.ekathimerini.com/253290/opinion/ekathimerini/comment/greek-f-16s-protect-north-macedonia>.

This constellation adds to a more positive and visible image of Greece in North Macedonia. That notwithstanding, the trust in Athens' intentions and role in North Macedonia's EU accession process is still low and will pretty much depend on Greece's positioning vis-à-vis Bulgaria's veto in the future.

Looking here at ethnic groups is quite interesting. In past surveys, there has often been a very clear divide between ethnicities when it came to highly politicized issues touching upon national identity, such as the opposition to the name change as a condition for EU membership or the perception of the Prespa Agreement.¹³

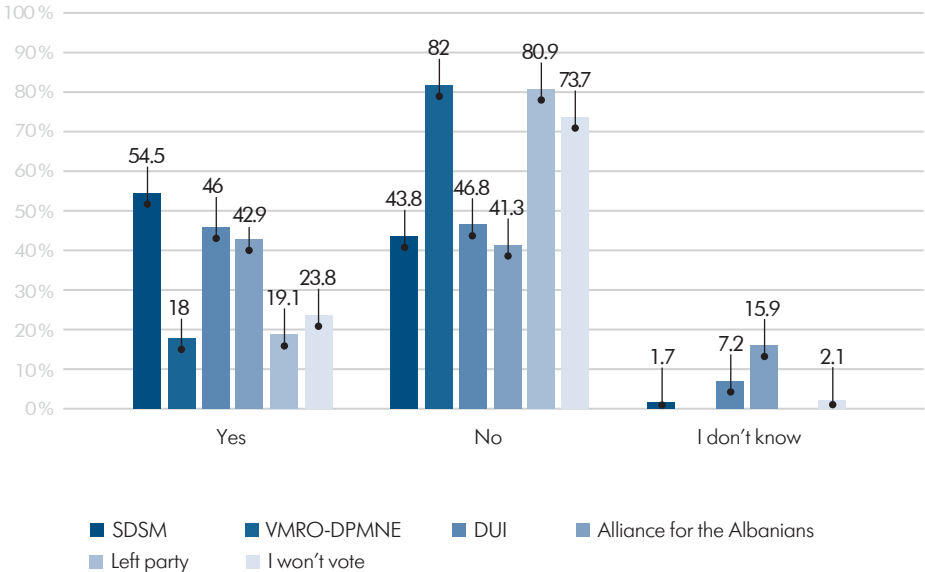
Chart 1.2. Do you expect that Greece will help the country in the EU accession negotiations process? (controlled for partisanship - how did you vote on the last parliamentary elections?)¹⁴



¹³ Zoran Nechev, Ivan Nikolovski, and Marie Jelenka Kirchner, "Sailing through Stormy Weather - Macedonia and the EU in 2018" (Institute for Democracy "Societas Civilis" - Skopje and Konrad Adenauer Foundation, February 2019), https://idscs.org.mk/wp-content/uploads/2019/02/A5_Sailing-through-stormy-weather-Macedonia-and-the-EU-in-2018ENG.pdf; Ivan Damjanovski and Marie Jelenka Kirchner, "Analysis of Public Opinion on Macedonia's Accession to the European Union (2014-2018)" (Institute for Democracy "Societas Civilis" - Skopje and Konrad Adenauer Foundation, February 2019), <https://www.kas.de/documents/281657/281706/Public+Opinion+Analysis+2018%28ENG%29.pdf/af2eb07b-0e39-1005-af51-c2fd2490cfcc?version=1.1&t=1550738995025>.

¹⁴ The questionnaire included all the political parties competing in the elections. However, DPA, the Left Party, Integra – Macedonian Conservative Party, the Social Democratic Union (SDU), MORO – Workers' Party, as well as the "I annulled the ballot" option were omitted due to statistical insignificance. The "I refuse to answer" option was removed as missing data.

Chart 1.3. Do you expect that Greece will help the country in the EU accession negotiations process? (controlled for partisanship - if parliamentary elections take place tomorrow, how will you vote?)



In this case, however, the original graph reflects the majorities and ratio of the ethnic Macedonian respondents (if with a few digits shifted in favour of a very decisive 69.8% for “No”). Among the ethnic Albanian respondents, almost 11% are unsure how to feel about Greece, while the

response for yes and no are balanced, with slight favour for “no”.

North Macedonia has a multi-party democracy in which, traditionally, parties served (rather) one of the two ethnicities. Within this system, the Social

Democratic Party SDSM and the national-conservative/ centre-right party VMRO-DPMNE have had their turns to form a coalition government with one of the smaller Albanian parties.¹⁵ In 2020, the (snap) elections were complicated by the outbreak of the Corona pandemic. In the end, the coalition “We Can” won by an extremely tight margin (35,89%), followed closely by VMRO-DPMNE and the Coalition “Renewal for Macedonia” (34,57%). The third biggest party is DUI (11.48%), followed by the Alliance for the Albanians (8.95%) and the Left Party (4.1%) which won 2 seats in parliament for the first time in 2020.¹⁶ Last, once major party from the Albanian political bloc, the Democratic Party of the Albanians (DPA), won 1.53% of the votes and hence only one MP.¹⁷ This small excursion to Macedonian parliamentary power relations is crucial to understand the cross-tabulation on partisanship in the right context.

When checking for partisanship, unsurprisingly, the vast majority of supporters of VMRO-DPMNE and the Coalition “Renewal for Macedonia” (82.7%) do not expect much help from the Greek side (and one might suspect that they would be reluctant to admit being in favour of receiving support from the country forcing a constitutional name change). Equally, following trends from recent years, non-voters show similar, if attenuated patterns and ratios to VMRO-DPMNE/ Coalition “Renewal for Macedonia”-supporters with 66% being pessimistic towards Greece and 31.9% being optimistic. Voters of the other parties are more divided in their expectations towards Greece with only a few percentage points difference between proponents of “yes” and “no”. Overall, only among the voters of the Alliance for the Albanians/Alternativa are many who cannot yet quite wrap their head around these bilateral affairs and ticked “I don’t know” (18.4%).

¹⁵ For more information, please turn to Pankovski et al., “The Republic of North Macedonia’s 2020 Parliamentary Elections Handbook Second Updated Edition,” 138–39.

¹⁶ Ibid.

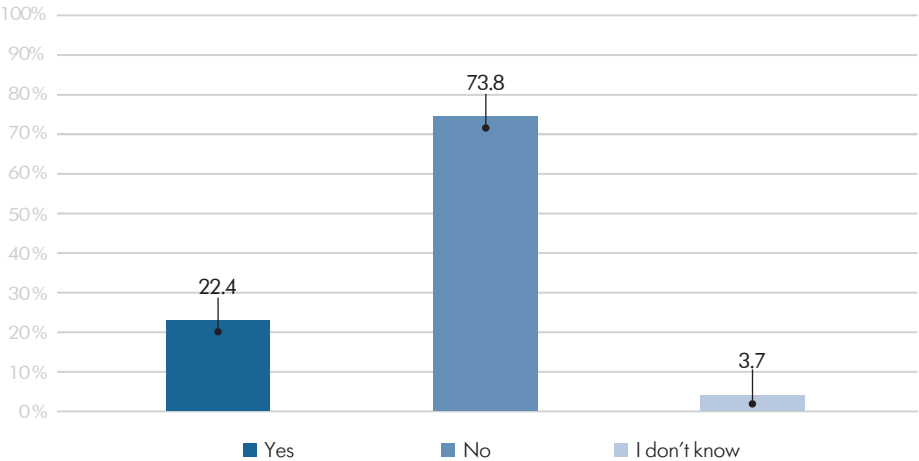
¹⁷ Ibid.

¹⁸ Ibid.

In regards to future voting behaviour, majorities do not change significantly. As a party of new significance, after gaining a foothold in parliament during the 2020 elections, the Left Party

has been included in this chart. Those respondents attracted to the Left Party show the following decision patterns: 80.9% pessimistic about Greek support, and 19.1% optimistic.

Chart 2. Do you expect that Bulgaria will help the country in the EU accession negotiations process?



Turning to the Eastern neighbour, respondents are even more pessimistic. The clear majority of the surveyed participants (73.8%) do not believe in Bulgarian support in the EU accession negotiation process. Less than a quarter of the participants (22.4%) feels optimistic regarding Bulgaria.

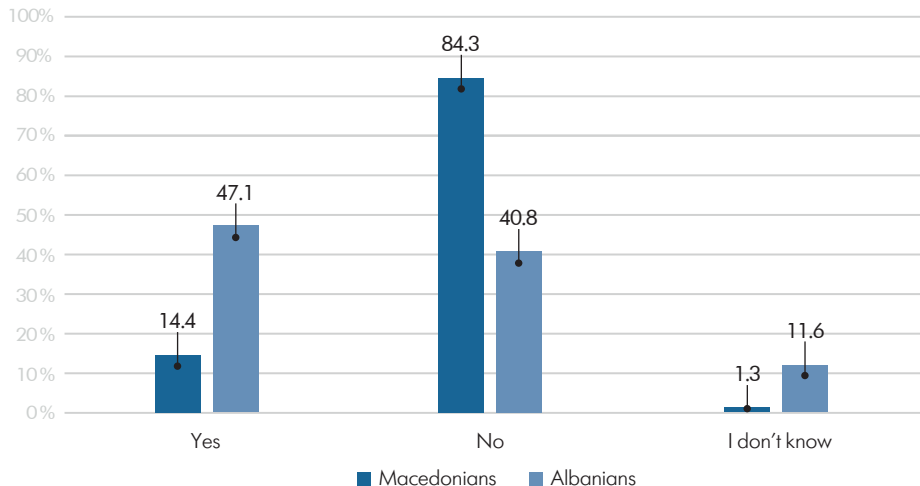
Such results were expected as well given Bulgaria's ambiguous position towards

the start of the accession negotiations with North Macedonia. Namely, Sofia supported and has repeatedly advocated for the start of the accession talks yet vetoed the negotiating framework and thus the first inter-governmental conference planned for December. Bulgaria insists the provisions of the Agreement for friendship, good neighbourly relations, and cooperation to be incorporated in the negotiating framework proposed by the European Commission.

At the same time, Sofia set additional conditions beyond the Friendship and Good Neighborly Relations Agreement deriving from the 2019 Framework position on North Macedonia and Albania, as well as the explanatory memorandum sent to the EU member states ahead of the decision on the start of the accession negotiations. These include referring to the Macedonian language as the 'official language of the Republic of North Macedonia' in the official EU correspondence; recognising the 'historical truth' about the 'Bulgarian roots' of the Macedonian language,

national history, and identity; combatting the state-sponsored 'anti-Bulgarian' ideology and hate speech, etc.¹⁹ Besides, months before the General Affairs Council Meeting organized on November 17 by the German Presidency with the Council of the EU, the Bulgarian officials from both the government and the opposition were repeating these claims and conditions on daily basis. The statements were generally perceived as inflammatory, provocative, and humiliating by their Macedonian counterparts and public resulting in growing anti-Bulgarian sentiment and domestic political polarization.

Chart 2.1. Do you expect that Bulgaria will help the country in the EU accession negotiations process? (controlled for ethnicity)

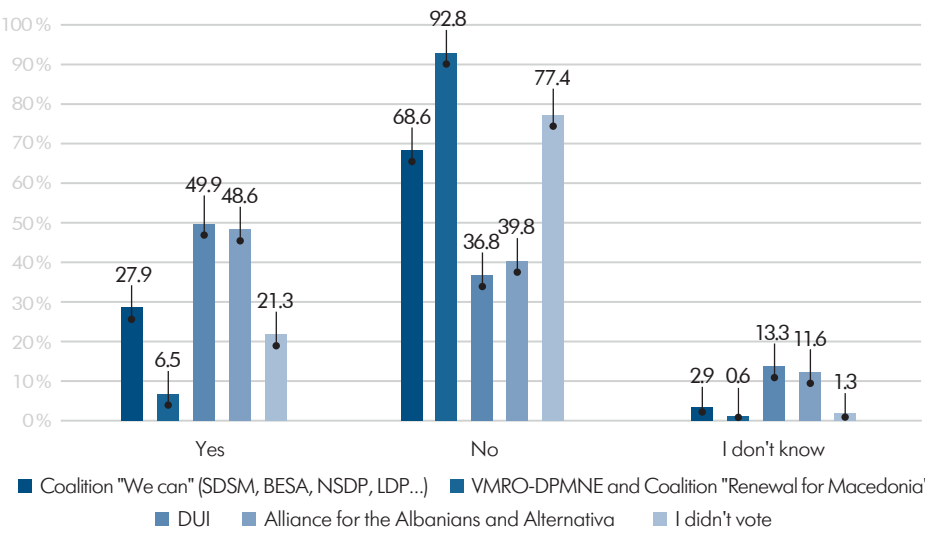


¹⁹ Council of Ministers of the Republic of Bulgaria, "Ramkova pozitsiya otnosno razshiryavane na ES i procesa na stabilizirane i asociirane: Republika Severna Makedoniya i Albaniya [Framework position on EU enlargement and the Stabilization and Association Process: Republic of North Macedonia and Albania]"; Kolekjevski, "Bulgaria Objects to 'State-Sponsored Anti-Bulgarian Ideology' in North Macedonia."

Again, ethnic Macedonians have stronger negative feelings towards Bulgaria, with an overwhelming 84.3% not believing in Bulgarian support. The group of Albanian respondents is less decided, however swinging slightly towards being more optimistic (47.1%) towards Bulgaria than being pessimistic (40.8%). Again, a bigger group of Albanians does not know how to feel about the question. These results just add to the existing differences across ethnic lines over the understanding and perceived salience of North Macedonia's national identity and

interests in the context of the country's EU accession. A similar situation was observed before, in the context of the name change. For instance, in 2016, 74% of ethnic Macedonians objected to EU-membership on the terms of a name change compared to 36% of ethnic Albanians even though this gap decreased over time.²⁰ They could also be explained by the rather pragmatic approach to the identity-related dispute with Bulgaria by the Albanian political elites and officials in the country, including the Foreign Affairs Minister Bujar Osmani.

Chart 2.2. Do you expect that Bulgaria will help the country in the EU accession negotiations process? (controlled for partisanship - how did you vote on the last parliamentary elections?)



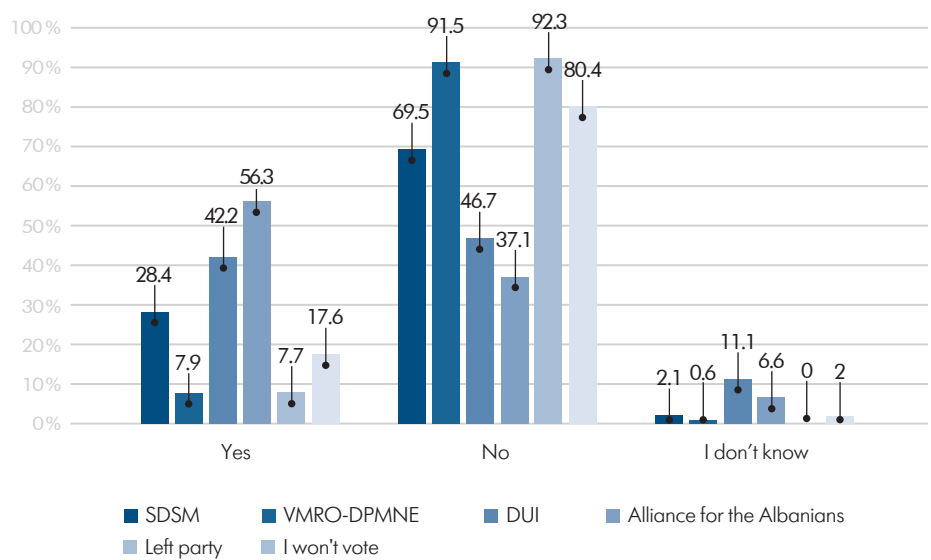
²⁰ Damjanovski and Kirchner, "Analysis of Public Opinion on Macedonia's Accession to the European Union (2014-2018)," 19.

Checking the results for partisanship does not bear any surprises and very well reflect the results from the ethnic divergence in the graph before. On the side of the Macedonian bloc, 92.8% of VMRO-DPMNE voters do not expect any support from the Eastern neighbour. Voters of the Coalition “We can” are more differentiated on this question, however, still strongly leaning towards the two-third majority of “no”. Between those two partisan results lie the results of non-voters. Voters of both

groups (“We can” and non-voters) can be expected to be heterogeneous, yet consisting of a majority of Macedonian ethnicity.

Voters of the Albanian parties, who can be expected to be mostly Albanians, are firstly more uncertain on the matter and secondly more prone to believe in Bulgarian support, if with only 13.1% (DUI) respectively 9.2% (Alliance for the Albanians/ Alternativa) margins.

Chart 2.3. Do you expect that Bulgaria will help the country in the EU accession negotiations process? (controlled for partisanship - if parliamentary elections take place tomorrow, how will you vote?)



All results referring to partisanship always check for voting behaviour in the past parliamentary elections as well as current party preference ("how would you vote if elections were to take place tomorrow"). Often enough, the changes between former and anticipated future elections are very small. This is different in this question, not only because there is a new party (the Left Party) included.

Despite everything which has tensed relations between North Macedonia and Bulgaria in 2020, more voters who expect Bulgarian support, are drawn to the Alliance for the Albanians. On the other hand, proportions among DUI supporters shift with a small majority being now less optimistic towards Bulgaria (4.5% margin). VMRO-DPMNE and the Left Party voters, as well as non-voters are the most pessimistic about Bulgaria. Although being

positioned on the opposite sides of the ideological spectre, both VMRO-DPMNE and the Left Party have objected to the Prespa and the Friendship and Good Neighbourly Relations agreements. However, VMRO-DPMNE stated that it would accept the (post-Prespa) "reality",²¹ while the Left Party has repeatedly called for Prespa Agreement's annulment.²² Furthermore, VMRO-DPMNE has insisted on joint national 'red lines', in response to Bulgaria's explanatory memorandum.²³ On the other hand, the Left Party proposed a Declaration for condemnation of Bulgaria's 'nationalist-chauvinist pretensions'.²⁴

²¹ 360 Degrees, "Мицкоски за Преспанскиот договор."

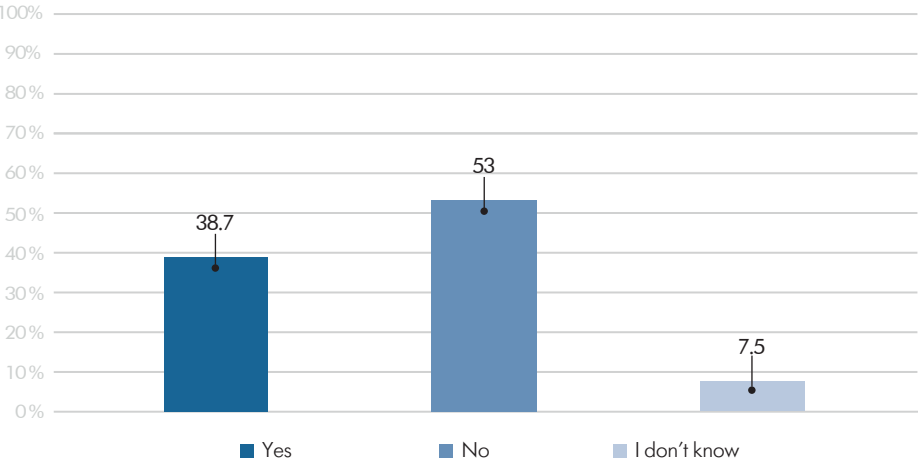
²² The Left, "Programa [Manifesto]," accessed December 16, 2020, <https://levica.mk/kratka-agitaciska-programa/>.

²³ 360 Degrees, "Milošoski na sednicata na sobraniskata komisija donese maketa od Dimitrov [Milosovski brought a model of Dimitrov at the session of the parliamentary committee]," December 11, 2020, <https://360stepeni.mk/miloshoski-na-sednitsata-na-sobraniskata-komisija-donese-maketa-od-dimitrov/>.

²⁴ The Left, "Levica podnese predlog Deklaracija za osuda na bugarskite nacional-šovinistički pretenzii [The Left submits draft Declaration condemning Bulgarian national-chauvinist claims]," October 22, 2020, <https://levica.mk/2020/10/22/levica-podnese-predlog-deklaracija-za-osuda-na-bugarskite-nacional-sovinisticki-pretenzii/>.

Go East? The Eurasian temptation

Chart 3. Will you support a membership in the EAU, led by Russia, as an alternative to the membership in the EU?



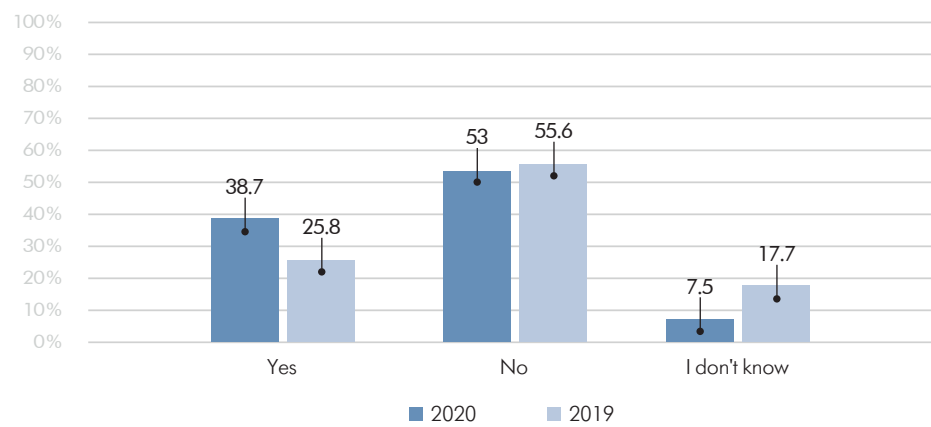
The question about a potential membership in the Eurasian Economic Union was first posed in 2019, a year which had been characterized by bitter disappointments regarding North Macedonia's EU aspirations. 2020, on the other hand, had been anticipated as a year of European opportunity when in March the country had

finally been given the green light to start accession negotiations. Unfortunately, as autumn came, the Bulgarian veto has again stalled the progress on developing a negotiating framework for the country or progressing in any other way. Nonetheless, the EU has signalled continuous support throughout the tumultuous year, including

generous financial recovery funds²⁵ within the – yet to be approved – Multiannual Financial Framework 2021-2027. In this context the ratios in this graph are a matter for some serious reflections. While in 2019, a fourth of respondents – most of them belonging to the Macedonian VMRO-DPMNE supporters – favouring the EAU over the EU seemed to be a surprisingly high number, this digit rose to 38.7% in this year's survey, slowly catching up with the 53% uncompromisingly standing

with the EU. While these results do not allow the reverse argument that only half of the Macedonian population remains in favour of EU membership, they should be considered by policymakers in the country and the EU alike. In fact, in 2020, 68.8% of Macedonians would still vote “yes” if a referendum on EU membership would take place tomorrow.²⁶ Overwhelming support, however, looks differently. A growing number of Macedonians seems well aware of – and tempted by – different foreign policy objectives than European integration.

Chart 3.1. Will you support a membership in the EAU, led by Russia, as an alternative to the membership in the EU? (compared with 2019)



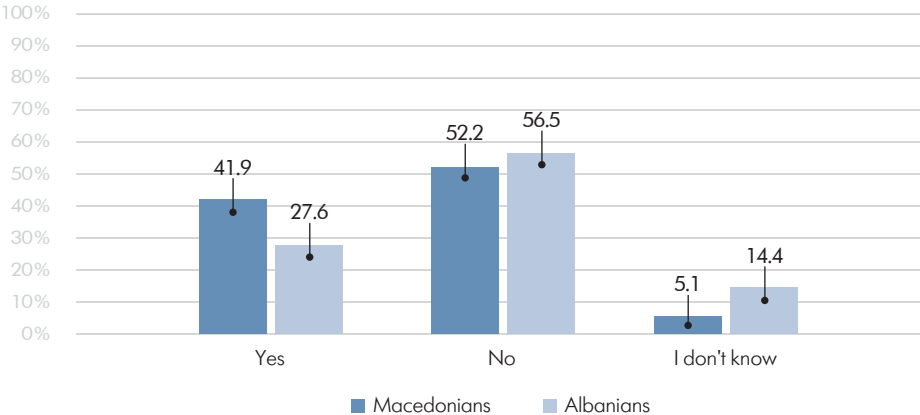
²⁵ European Commission, “An Economic and Investment Plan for the Western Balkans,” Text, European Commission - European Commission, October 6, 2020, https://ec.europa.eu/commission/presscorner/detail/en/ip_20_1811.

²⁶ Ivan Damjanovski, “Analysis of Public Opinion on North Macedonia’s Accession to the European Union (2014-2020)” (Institute for Democracy “Societas Civilis” - Skopje and Konrad Adenauer Foundation, 2020).

As mentioned above, the increase among EAU supporters is quite significant, considering that there are only two values to compare at this point. Interestingly, the support for EU membership (in this context) has only dropped by about 3% from 2019.

The remaining 10% explaining the 13% increase between the years are likely to be drawn from the pool of formerly undecided respondents. Respondents not knowing what to answer have dropped by 10% to only 7.5% in 2020.

Chart 3.2. Will you support a membership in the EAU, led by Russia, as an alternative to the membership in the EU (controlled for ethnicity)



Following the 2019 trends, ethnic Macedonians are more likely to favour the EAU over the EU than ethnic Albanians, while both ethnicities are almost level pegging at 52.2% (Macedonians) respectively 56.6% (Albanians) in their opposition to EAU. Again here, ethnic Albanians are more likely to be undecided

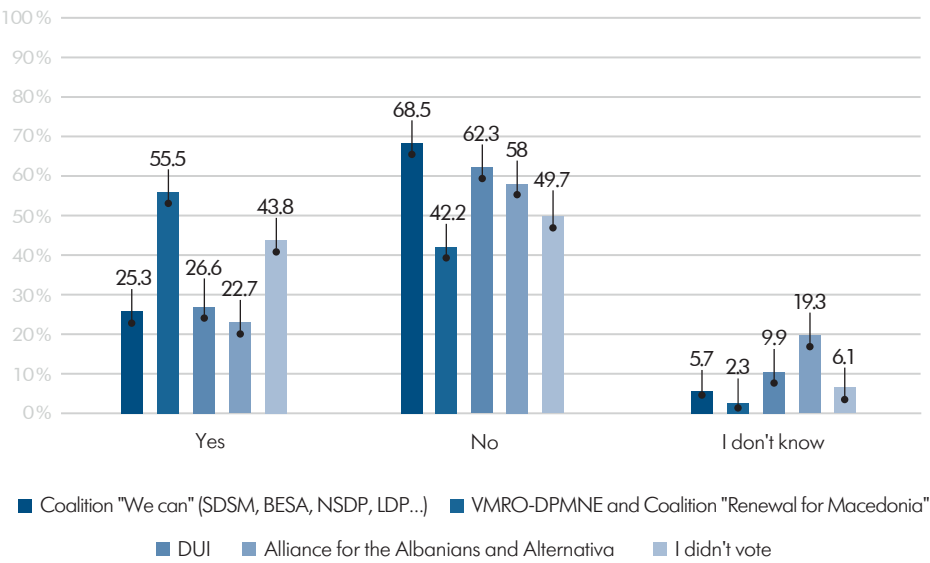
on the matter than ethnic Macedonians.

Comparing the results to last year, it becomes visible that ethnic Macedonians have made up their minds, compared to last year. Again, as is often the case with formerly undecided groups, as well as non-voters, the drop in “I don’t know”-answers

falls in favour of “less EU, more North Macedonia”, bluntly put. On the other hand, there has been a sharp drop in the formerly

high opposition to EAU membership among the Albanian respondents, again, in favour of more support for EAU membership.

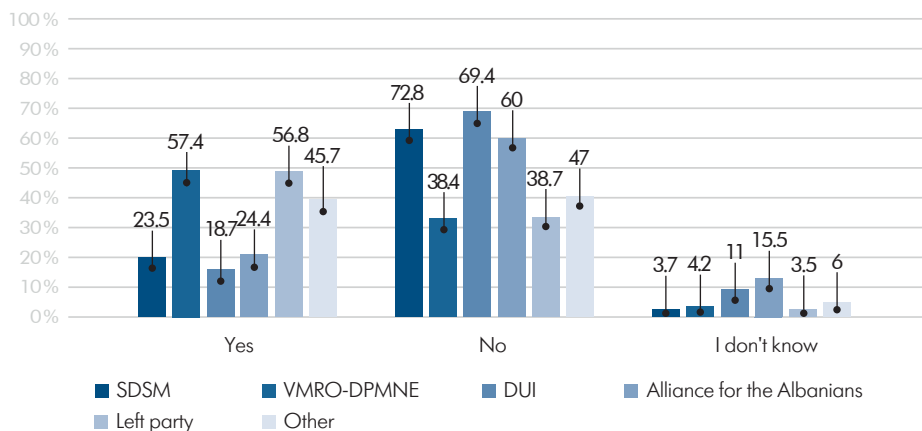
Chart 3.3. Will you support a membership in the EAU, led by Russia, as an alternative to the membership in the EU? (controlled for partisanship - how did you vote in the last parliamentary elections?)



Controlling for partisanship, the results do not offer great surprises and show a similar picture to the 2019 survey (if with different numbers): The biggest support for an EAU alternative can be found among the electorate of VMRO-DPMNE (55.5% in “voted in past elections” vs. 57.4% in “would vote”), followed by non-voters (43.8% in “voted

in past elections” vs 45.7% in “will vote”). The majorities for “no” among the other groups are more distinctive, accounting for 68.5% vs 72.8% among “We can”/ SDSM-supporters, 62.3% vs 69.4% among the past and expectant DUI electorate, and 58% vs 60% among the Alliance for the Albanians electorate.

Chart 3.4. Will you support a membership in the EAU, led by Russia, as an alternative to the membership in the EU? (controlled for partisanship - if parliamentary elections take place tomorrow, how will you vote?)



When including the Left Party in the questionnaire, their results should not come as a surprise. Looking at their anti-NATO, anti-Albanian, and pro-Macedonian party stance, their eastwards leaning is expected.²⁷ While the Left Party certainly demands its country-specific analysis, their anti-imperialist stance and “open attitude” towards Russia can to some extent also be found among e.g. the German Left Party

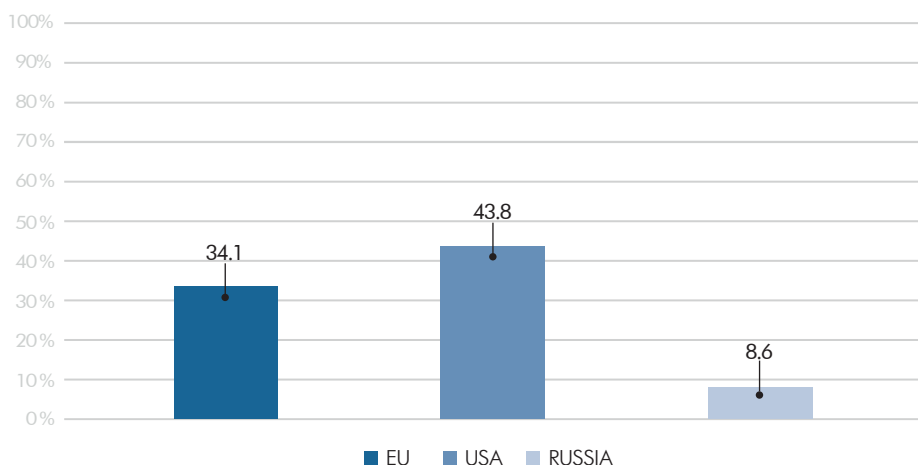
whose members are often criticized to be *Russlandverstehers*, hence “understanding of Russia”.²⁸ That said, of course, it is important to keep in mind to what extent the Left Party is being supported at this point. Nonetheless, from a democratic perspective and European interest it is worth noticing the upturn of a party with a seemingly more radical, less Europeanized electorate.

²⁷ Sinisa Jakov Marusic, “North Macedonia’s Left Party Borrows Heavily From Right,” *Balkan Insight* (blog), July 31, 2020, <https://balkaninsight.com/2020/07/31/north-macedonias-left-party-borrows-heavily-from-right/>.

²⁸ Justus Bender, “AfD und Linke: Die Russland-Versteher,” *FAZ.NET*, September 13, 2020, <https://www.faz.net/1.6948883>.

International mingling: foreign factor influence and global partnerships

Chart 4. According to you, which foreign factor has the greatest influence in North Macedonia?²⁹



Respondents of the IDSCS and KAS public opinion survey have been asked about foreign factor influence in North Macedonia since the beginning, hence this graph allows to talk about trends. The trend has been a steady gain of recognition for the European

Union which had originally started at 21.8% compared to the US being considered strikingly more influential by more than double the respondents (48.1%). In 2019, the EU overtook the US for the first time, only to be now again lagging by almost 10%.

²⁹ The remaining percentages are divided between other, statistically insignificant foreign factors.

As for other foreign factors, Russia is very slowly registering a comeback to original (small) heights of almost 9% after its recognition had dropped in 2018. Interestingly, the values for recognition of

the US as most influential grew only slightly in comparison to the past year (less than 3%), yet a visible shift is to be found in the drop of the EU (from 44.8% in 2019 to 34.1% in 2020). Russia gained another 2.7%.

Chart 4.1. According to you, who which foreign factor has the greatest influence in North Macedonia? (previous years)

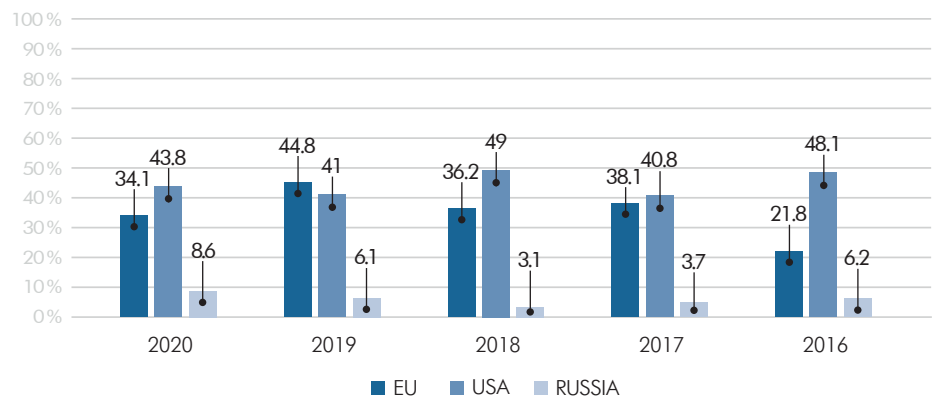
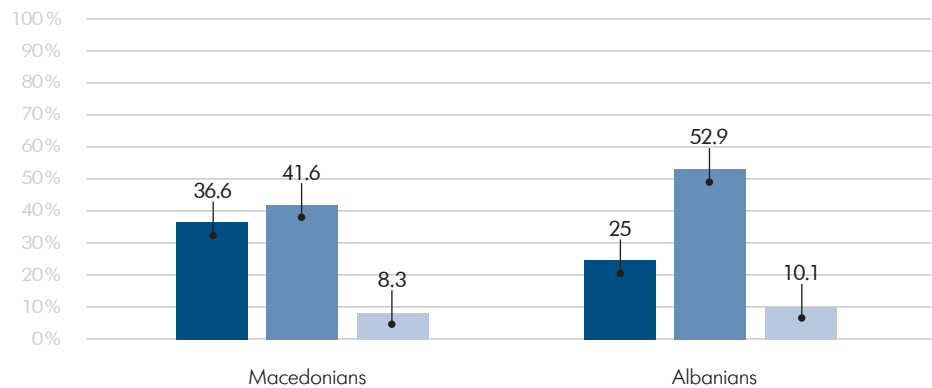


Chart 4.2. According to you, which foreign factor has the greatest influence in North Macedonia? (controlled for ethnicity)

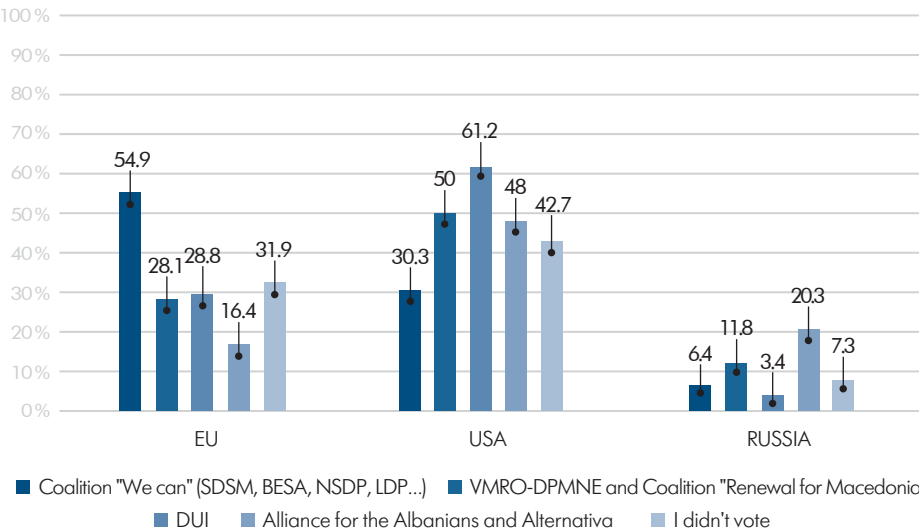


Traditionally, ethnic Albanians have been more supportive of the US and have expressed the country's perceived influence in this survey. Therefore, it had been interesting to see that in 2019 their majorities had shifted in favour of the EU. This year, this is turned around again and more than half the Albanian respondents (compared to only a good third in 2019) consider the US to be, again, the most influential. More striking here is however the doubled support for Russia as most influential. This recognition of Russia is a fairly new trend (to this extent) among ethnic Albanians which had been rather sceptical towards the big Eastern power in

the past. Now, with 10.1% of respondents choosing Russia as most influential, this digit overtakes even the 8.3% of ethnic Macedonians. The chart does, however, no conclusions as to whether this would be considered positive or negative. That said, with almost a third of Albanians supporting the EAU alternative membership an overall shift in the Albanian attitude towards Russia must be noticed.

As the chart assumes, ethnic Macedonians have not changed their opinion quite as radically as the Albanians, nonetheless, the drop for the EU is visible.

Chart 4.3. According to you, which foreign factor has the greatest influence in North Macedonia? (controlled for partisanship - how did you vote in the last parliamentary elections?)

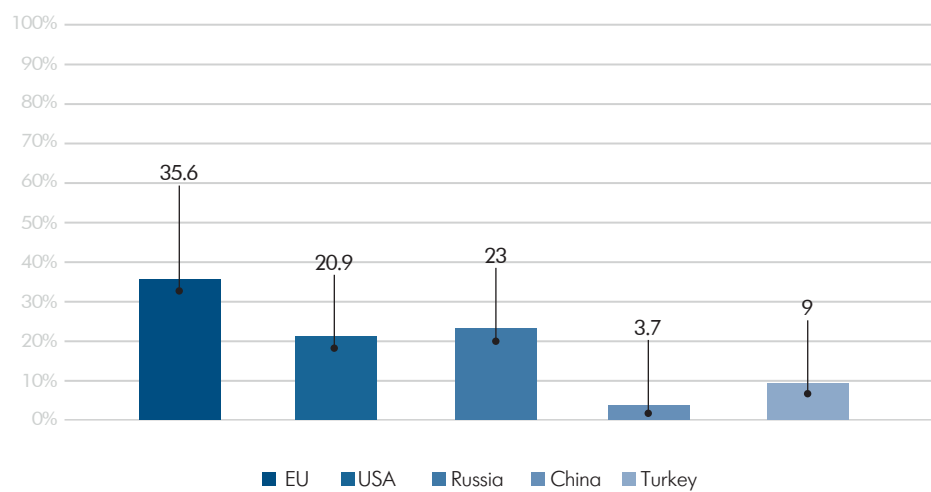


Among the different parties, the “We can” electorate most clearly (yet, still with only 54.8%) considers the EU to be most influential, while on the other side, the DUI electorate (more clearly with 61.2%) draws towards the US. Following the thought from above, regarding ethnic Albanians and Russia, the strong feeling towards Russia, similarly to last year, can be found among the electorate of the Alliance for the Albanians/ Alternative where 20.3% consider Russia most influential, compared

to 16.4% who chose the EU. The second-biggest Russia support can be found among “Renewal for Macedonia”/ VMRO-DPMNE voters at 11.8%.

Among the Left Party electorate, on the other hand – quite pro-Russian as explained above – not many (8.5%) consider Russia to be the most influential. Quite the opposite: The (“imperial power”) US won the race in this group (41.7%) possibly showing that “Foreign Factor Influence” is considered negatively.

Chart 5. According to you, who would be North Macedonia’s greatest ally?³⁰



³⁰ The remaining percentages are divided between other, statistically insignificant preferred foreign allies.

Also reminiscent of past editions, “foreign factor influence” and “greatest ally” often do not match. Since the beginning, the EU has been considered North Macedonia’s greatest ally, yet the numbers have before been significantly higher than in 2020. This year, they represent only a little more than a third of respondents (35.6%). On the other hand, Russia (23%) is increasingly getting stronger, but so is the US (20.9%) who is levelling up with Russia. Turkey (9%) is slowly registering a small comeback and China, a new actor on the scene, manages baby steps towards being considered a greater ally by some (3.7%).

Out of all the graphs looking at foreign factors and North Macedonia, this one allows the most interpretation since “ally” comes likely with an emotional element. Each of the five actors listed above represents a very different set of values, world order (especially considering that the US has been headed by Donald Trump for the past 4 years), and approach to North Macedonia. While the EU offers the promise of membership, democracy, and economic stability, the US represents a strong security agenda (with NATO). Russia, on the other hand, lures with the promise of strength, self-determination and national power, while China offers loans without democratic conditions and the like.

Chart 5.1. According to you, who would be North Macedonia’s greatest ally? (previous years)

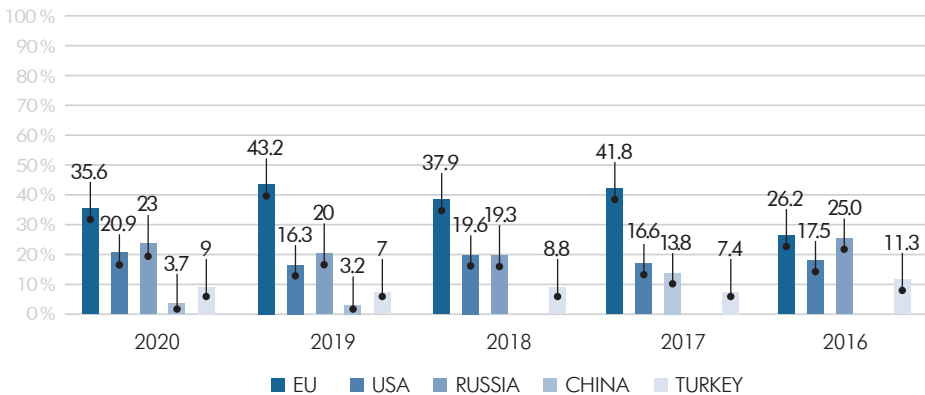
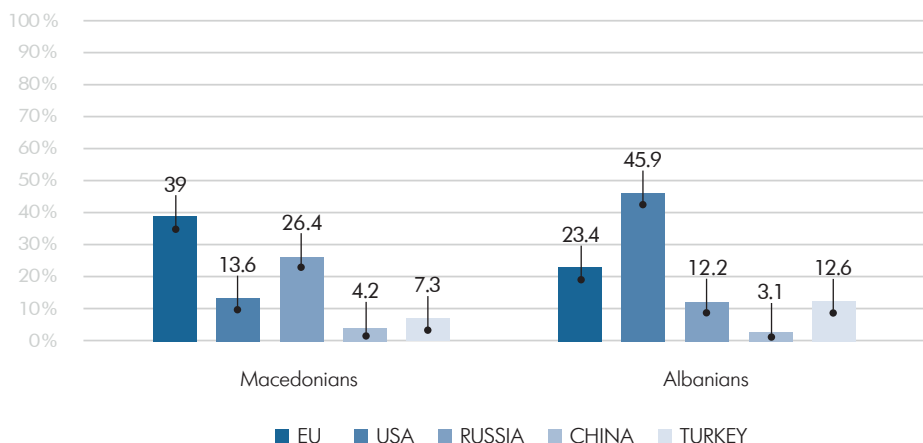


Chart 5.2. According to you, who would be North Macedonia's greatest ally? (controlled for ethnicity)

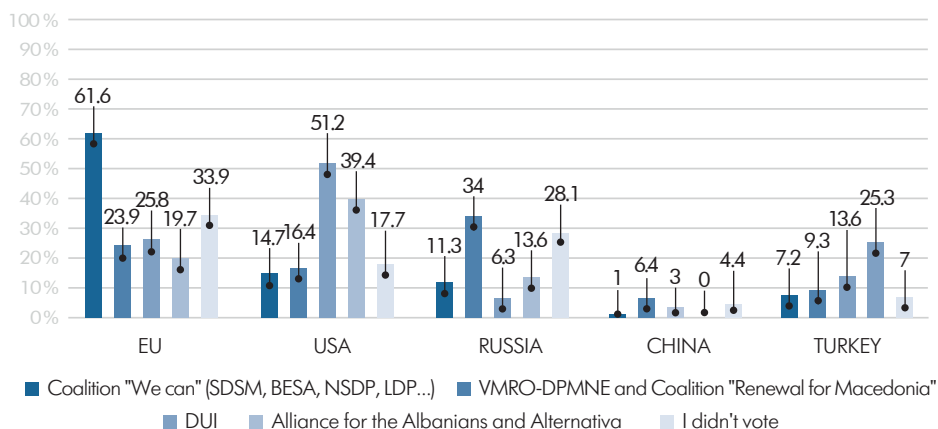


Ethnic Macedonians are separated mostly into two (differently sized) groups: Those who see their greatest ally in the EU (39%), and those who hope for more support from Russia (26.4%). The US lies in this ethnic group at 13.6% and Turkey (7.3%) and China (4.2%) come in last. This reflects almost no change in comparison to 2019.

Ethnic Albanians, on the other hand, have had – again – a shift in their perception. The Albanian perception of the greatest ally has from the beginning been subject to variation and ups and downs between

the EU and the US. The jump for the EU to almost 60% vs. a weak 22% for the US in 2019 seemed unexpected. Surprising is however the reversal of majorities in 2020 where now 45.9% (overreaching the 2018 peak of almost 42%) of Albanians see their greatest ally in the US, while only 23.4% consider the EU the like, the lowest value so far. Russia, on the other hand, succeeds its former best value (from 2016) with 12.2%, and Turkey, a big supporter of the Muslim (Albanian) community in the country, regains recognition (12.6%).

Chart 5.3. According to you, who would be North Macedonia's greatest ally? (controlled for partisanship - how did you vote in the last parliamentary elections?)



Among parties, the "We Can"-coalition (and SDSM more specifically) are drawing the pro-European electorate. The EU-supportive electorate is to be found in this group (61.6%), compared to 23.9% of VMRO-DPMNE voters. The highest support for the US can be found within the Albanian electorate, on the other hand. Non-voters are undecided on this question and do not give much reason to speculate. It simply shows that non-voters are made up of a heterogeneous group.

Last but not least, the Alliance for Albanians/Alternative is worth a more detailed look. Their electorate is split between all possible answers except China, yet while the majority

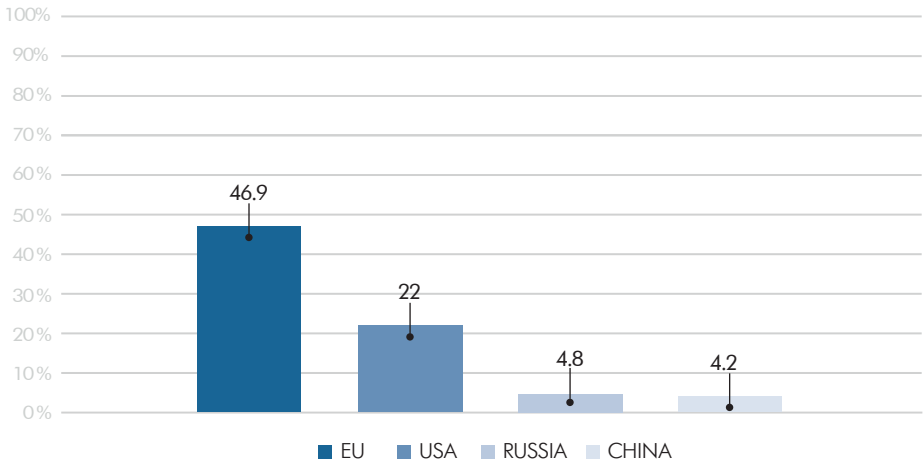
feels drawn towards the US (39.4%), the most interesting value here is the 25.3% perception of Turkey as the greatest ally. It has been touched upon briefly before that Turkey has been greatly supporting the Muslim (Albanian) community in North Macedonia for years³¹ and this value well represent the fruits these efforts.

Both China and Turkey were disregarded in the 2019 survey for insignificance, yet apart from that, ratios have not shifted much among the big party coalitions. As must be expected looking at the ethnic cross-tabulation, ratios have turned around within the Albanian party electorate in favour of the US.

³¹ Asli Aydintasbas, "From Myth to Reality: How to Understand Turkey's Role in the Western Balkans," ECFR, March 13, 2019, https://ecfr.eu/publication/from_myth_to_reality_how_to_understand_turkeys_role_in_the_western_balkans/.

Talking money

Chart 6. Who's the greatest donor (provides money for development) in North Macedonia?



Almost half of the participants (46.9%) consider the EU to be the greatest donor for North Macedonia, followed by the US (22%) and closed by distant Russia (4.8%) and China (4.2%). First of all, this shows that – apparently – influence (remember the strong US position) is not equated with funding. In reverse, this also means that – while the EU is considered by many the greatest donor this money does not

translate into them being considered most influential (and, on top, they are losing recognition as an ally). Russia, on the other hand, is considered a great ally despite its lack of financial support, showing clearly that – depending on group – money is not all that counts. Instead, it can be assumed, that among some respondents, ideological feelings (or simply, wishful thinking) tick the boxes.

Chart 6.1. According to you, Who's the greatest donor (provides money for development) in North Macedonia ? (previous years)

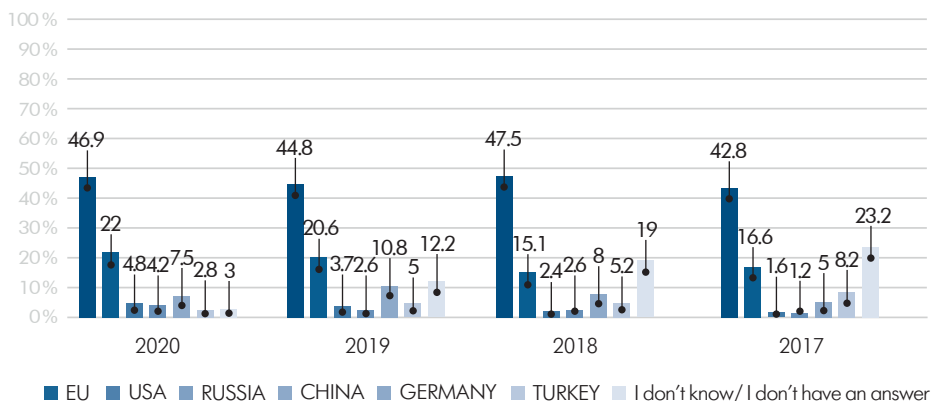
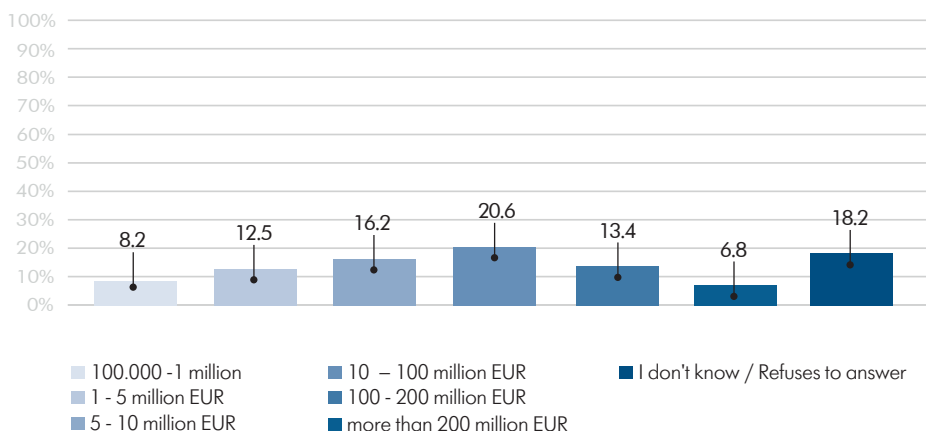


Chart 7. According to you, how much money annually do you think the EU gives North Macedonia annually?



For a few years, respondents have been asked about their knowledge of EU funds allocated to North Macedonia. These results can show the level of knowledge or awareness among the Macedonian society on the volume of EU financial support

which is invested in a variety of areas including infrastructure, civil society, and the strengthening of democratic and legal structures. Those funds are allocated within the Multiannual Financial Framework and therefore are budgeted for 7 years. Between

2014 and 2020 the EU budgeted 608.7 million Euros within the Instrument for Pre-Accession Assistance (IPA II).³² For this question, one could argue that therefore the country receives around 87 million Euros annually, falling right into the centre of the graph (10-11 million Euros annually) as 20.6% of respondents know – or assume – correctly. That said, responses are spread all over the

spectrum, with only the edges falling off with single percentages of supporters. Similar to recent years, the number of respondents unsure or refusing to answer remains high at 18.2%, however visibly dropping each year. While these numbers give reason to hope that respondents are increasingly aware of the actual volume of EU funds to the country, this poll does not allow such conclusions.

Chart 7.1 According to you, how much money annually do you think the EU gives North Macedonia annually? (previous years)

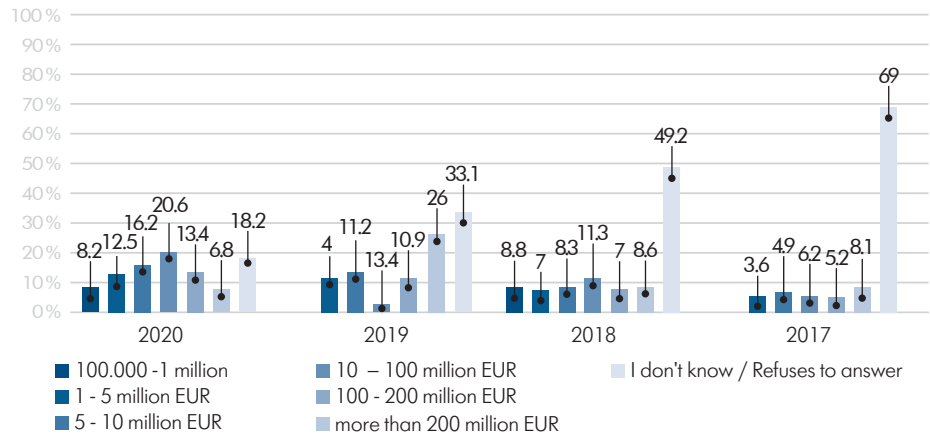
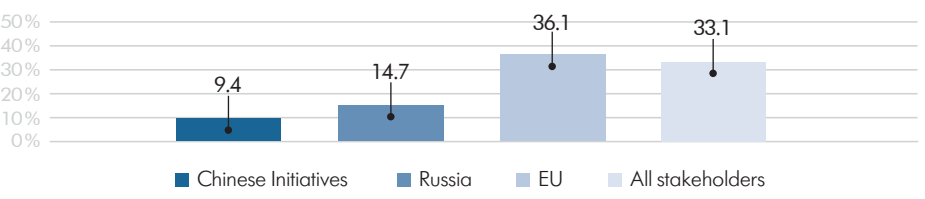


Chart 8. From which country should North Macedonia receive major economic aid?



³² European Commission, "North Macedonia - Financial Assistance under IPA II," Text, European Neighbourhood Policy And Enlargement Negotiations - European Commission, December 6, 2016, https://ec.europa.eu/neighbourhood-enlargement/instruments/funding-by-country/north-macedonia_en.

This question has been introduced freshly in 2020, as a response to growing foreign interest in the Western Balkan region, especially from China. Within the margin of error, both the EU and all the stakeholders included (Chinese initiatives, Russia, and the EU) are seen as the most preferred sources of economic aid with little over one-third of the respondents choosing each of the two options. Although the EU is perceived as the country's greatest ally and donor providing the largest amount of cumulative FDIs in the country in the period between 2010 and

2018 (3.2 billion EUR),³³ North Macedonia has been open to investments and economic cooperation with the other global and regional powers present in the Western Balkans. Even the pro-EU government of SDSM has professed close economic relations, especially with China, describing the 17+1 initiative³⁴ as complementary with North Macedonia's Euro-Atlantic aspirations.³⁵ Told with the words of Prime Minister Zoran Zaev, "North Macedonia is a beautiful crossroad of American, European and Chinese interests", with a potential for economic growth.³⁶

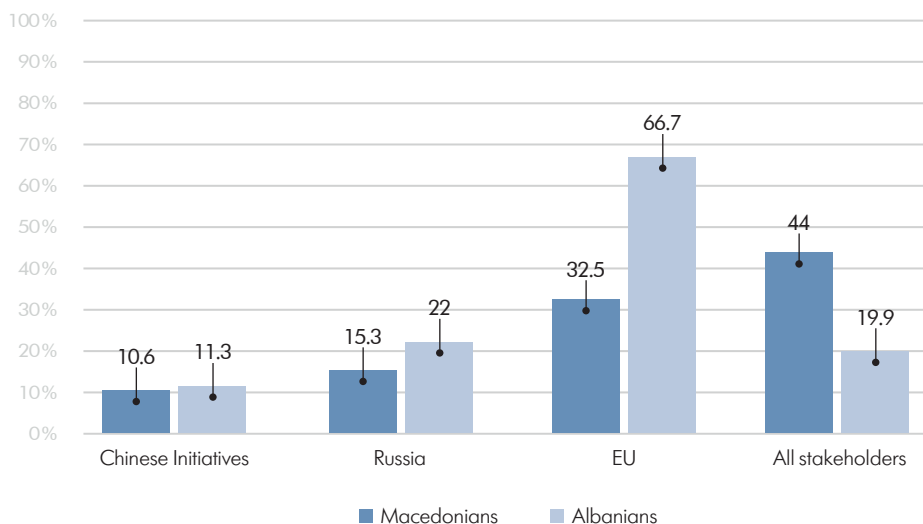
³³ National Bank of the Republic of North Macedonia, "Direct Investment in the Republic of North Macedonia," 2018, <https://www.nbrm.mk/ns-newsarticle-direktni-investicii-vo-republika-makedonija--metodologija-bpm6-en.nspix>.

³⁴ 17+1 is a Chinese initiative for promotion of business and investment relations between China and 17 countries of CEE (CEEC) – Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, North Macedonia, Montenegro, Poland, Romania, Serbia, Slovakia and Slovenia.

³⁵ Government of the Republic of North Macedonia, "Premierot Zaev na Samitot 16+1 vo Sofija: So novite inicijativi od ovoj samit ja zacvrstuvame i unapreduvame vzaemnata sorabotka [Prime Minister Zaev during the 16+1 Summit in Sofia: With the new initiatives from this summit we reinforce and upgrade the joint cooperation]," July 7, 2018, <https://vlada.mk/node/15133>; Government of the Republic of North Macedonia, "Premierot Zaev od 8-ot Samit na Shefovi na Vladi na zemjite od CIE i NR Kina 16+1: Ja unapreduvame ekonomskata sorabotka so NR Kina, potpishavme Akcionen plan za sorabotka vo oblasta na zemjodelstvoto [The Prime Minister Zaev from the 8th Summit of Heads of Governments of the CEE and PR China 16+1: We upgrade the economic cooperation with PR China, we signed an Action plan for cooperation in the field of agriculture]," April 12, 2019, <https://vlada.mk/node/17469>; Government of the Republic of North Macedonia, "Premierot Zaev od plenarnata sesija na Shefovi na Vladi od CIE i NR Kina 16+1: Silno ja poddrzhuvame inicijativata 16+1, imame ogroman potencijal da gi unapredime ekonomskite i biznis partnerstvata [The Prime Minister Zaev from the plenary session of the heads of governments of CEE and PR China 16+1: We strongly support the 16+1 initiative, we have a great potential to upgrade the economic and business partnerships]," April 12, 2019, <https://vlada.mk/node/17465>.

³⁶ Quoted in Mirce Jovanovski, "Od prodazhba na zemjodelsko zemjishte Zaev очекува 200 до 300 милиони евра. Popova Shapka mozhe da odi vo 'paket' so Brezovica [Zaev expects from 200 to 300 million euros from an agricultural estate's sale. Popova Shapka can be sold together with Brezovica]," November 15, 2020, <https://nezavisen.mk/od-prodazhba-na-zemjodelsko-zemjishte-zaev-ochekuva-200-do-300-milioni-evra-popova-shapka-mozhe-da-odi-vo-paket-so-brezovica/>.

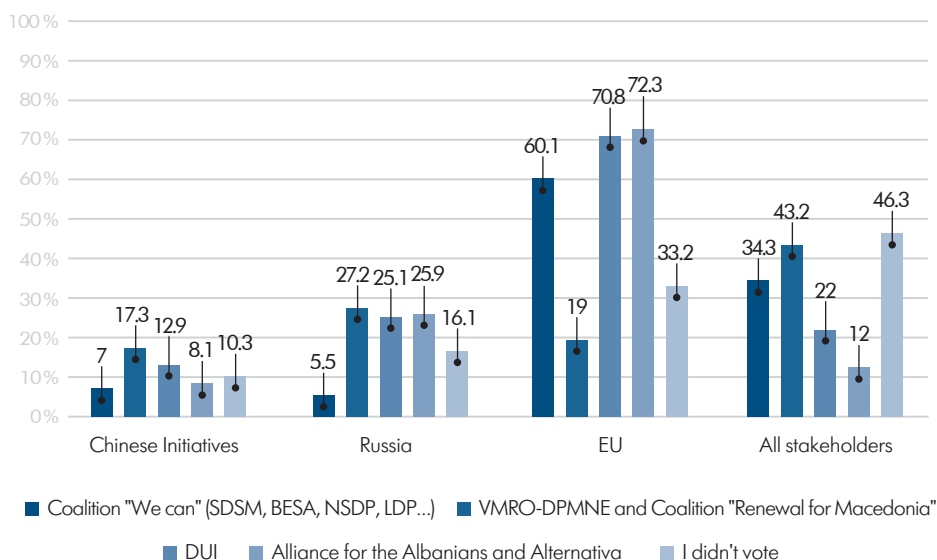
Chart 8.1. From which country should North Macedonia receive major economic aid?
(controlled for ethnicity)



When controlling for ethnicity, the survey demonstrates puzzling findings. Unsurprisingly, the EU enjoys greater support among the ethnic Albanian respondents with 66.7%, which is almost double the support received by their ethnic Macedonian counterparts who are more open to economic aid coming from various sources. However, it is counterintuitive, at least judging from the perspective of desired alliance with the foreign powers, that the preference for China

is almost equated (within the margin of error), while Russia enjoys greater support among ethnic Albanians. This could suggest that, when controlling for ethnicity, the perceptions about North Macedonia's greatest ally, despite the growing pro-Russian sentiment, do not necessarily mirror the perceptions about the preferred economic aid provider. Therefore, the reasons behind such perceptions should be tracked beyond the respondents' ethnicity.

Chart 8.2. From which country should North Macedonia receive major economic aid? (controlled for partisanship - how did you vote on the last parliamentary elections?)



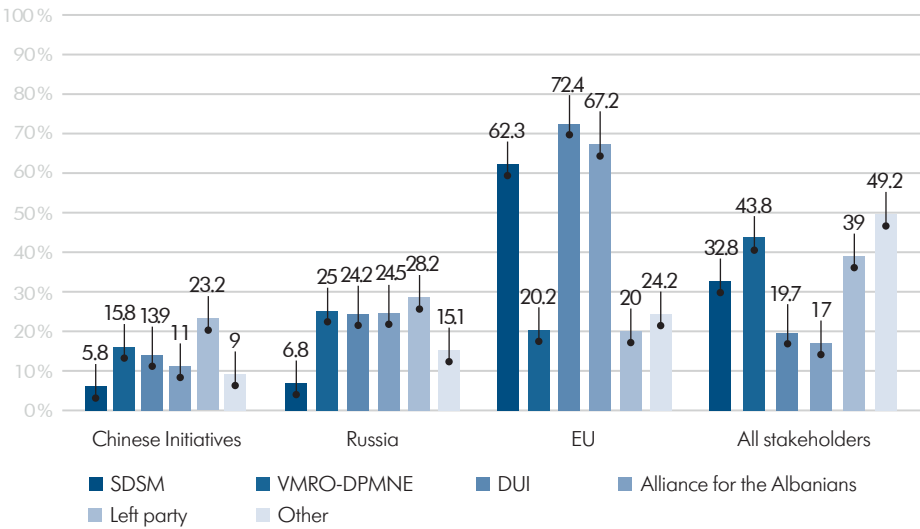
Similar trends can be seen when controlling for partisanship (both voting behaviour in the past parliamentary elections as well as current party preference). Namely, the support for the EU is greater in the so-called Albanian political bloc as the relevant political parties of the ethnic Albanians are more likely to support economic aid coming exclusively from the EU. The only exception within the so-called Macedonian political

bloc is SDSM whose supporters are most inclined towards economic aid coming from the EU only. VMRO-DPMNE voters, on the other hand, are most likely to support economic aid coming from all stakeholders combined. This can be explained by the growing Euroscepticism in VMRO-DPMNE's pool of supporters and voters, detected in other categories throughout the years, such as preferred foreign alliance or the support

for alternatives to the EU membership like the Eurasian Union. Surprisingly, the most striking result is the ranking of Russia as the second most preferred economic aid provider among the Albanian parties whose voters are more likely to choose Moscow than Beijing or all other stakeholders combined as their second choice. Again,

a similar conclusion can be drawn, that is, the perceptions about the preferred foreign alliance do not necessarily correspond with the perceptions about the preferred foreign aid provider when controlling for partisanship notwithstanding the increased pro-Russian attitudes.

Chart 8.3. From which country should North Macedonia receive major economic aid? (controlled for partisanship - if parliamentary elections take place tomorrow, which party you are going to vote for ?)



Conclusion

Notwithstanding the promising start, 2020 turned out to be as unpredictable for North Macedonia's EU path as the dynamic of the coronavirus on a global level. In fact, the future of North Macedonia is even more unpredictable at this point than it was last year, which provides a fertile ground for rival powers' power of attraction and malign influence.³⁷ The pro-Russian sentiments continue with their growing trends among ethnic Macedonians, the supporters of VMRO-DPMNE, non-voters, and the Left Party's electorate, but also ethnic Albanians and Albanian political parties. Moreover, Turkey is perceived as the country's second greatest ally by the voters of Alliance for the Albanians and Alternativa – the major opposition parties in the Albanian bloc. This

trend is mirrored in the support for the membership in the Moscow-led Eurasian Union, which also goes upwards, as well as in the case of the preferred economic aid provider.

Overall, following the trends from previous years, the results of the 2020 IDSCS Public Opinion Poll show growing polarization and rising Euroscepticism in the context of blocked EU accession. This, however, should not surprise us given that the EU, once again, fails to speak with one voice on North Macedonia's EU membership prospects. What is more, the efforts that the country has made given the conditions set by single member states – unprecedented in the history of the EU enlargement – were 'rewarded' with sticks instead of carrots.

³⁷ Zoran Nechev and Ivan Nikolovski, "Hustled Into a Dead End: The Delusional Belief In Chinese Corrosive Capital for the Construction of North Macedonia's Highways," 39 (Skopje: Institute for Democracy "Societas Civilis" - Skopje, September 28, 2020); Zoran Nechev and Ivan Nikolovski, "North Macedonia: A Fertile Ground for External Influences," in *The Western Balkans in the World: Linkages and Relations with Non-Western Countries*, ed. Florian Bieber and Nikolaos Tzifakis (Taylor & Francis, 2020), 126–45; Dimitar Bechev, "Despite Good News, the Western Balkans Are in Trouble," April 1, 2020, <https://www.aljazeera.com/opinions/2020/4/1/despite-good-news-the-western-balkans-are-in-trouble>; Ivan Nikolovski, "Russia Still Has Cards to Play in North Macedonia," Balkan Insight (blog), July 3, 2019, <https://balkaninsight.com/2019/07/03/russia-still-has-cards-to-play-in-north-macedonia/>; Wouter Zweers et al., "China and the EU in the Western Balkans A Zero-Sum Game?," Clingendael Report (Clingendael Netherlands Institute of International Relations, August 2020), <https://www.clingendael.org/sites/default/files/2020-08/china-and-the-eu-in-the-western-balkans.pdf>; "Southeast Europe in Focus," External Actors Series: Turkey (Südosteuropa-Gesellschaft, 2020).

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Information about KAS

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

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IDSCS is a think-tank organisation researching the development of good governance, rule of law and North Macedonia's European integration. IDSCS has the mission to support citizens' involvement in the decision-making process and strengthen the participatory political culture. By strengthening liberal values, IDSCS contributes towards coexistence of diversities.

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