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Analysis of public opinion on North Macedonia's accession to the European Union (2014-2022)

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Summary of results

- The developments in 2022 in the Macedonian accession process have had a slight negative effect on public support for EU membership.
- In 2022, 64% of the population would vote positively for North Macedonia's membership in the EU, equalling the results from 2019, which has had the lowest values for positive support in the longitudinal dataset.
- These dynamics didn't have any effects on the Eurosceptic attitudes of the population as only 11% of the population is openly Eurosceptic.
- 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 (79%) are in favour of EU membership
- Respondents with higher education and high income tend to be more supportive for the country's membership in the EU.
- For more than half of the population EU membership is highly important.
- For roughly a quarter of the population, EU membership is not an important issue in their lives.
- EU membership is highly important for 75% of the ethnic Albanians, which is 30% more than in the case of the ethnic Macedonian respondents.
- The ethnic Macedonians in general are more pessimistic and critical of the accession process when compared to the ethnic Albanians.
- Almost half 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.
- There is a slight dissatisfaction with how much the country has progressed in the accession process in the past year.
- A third of the population shares the opinion that there has been no progress at all in the accession process.
- Almost half of the population indicates the obstructions from neighbouring EU member states as the main barrier to EU membership.
- A growing number of respondents (more than a third in 2022) believe in a 10 to 20 years period as a viable timeframe for obtaining membership.
- One third of the population believes that North Macedonia will never become a member of the EU.
- Almost a third of the population shares a rather unrealistic expectation of EU membership in the next 3 to five years.
- There is a clear lack of information and awareness among a considerable part of the population in regard to the normative and operational aspects of EU's enlargement policy, the dynamics of the accession process and the length of the accession negotiations.
- The rationalist-utilitarian factors 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.

- Majority of the population believes that the biggest positive effects of the EU integration process will come in the economic domain.
- Identity and value-based factors are key determinants of opposition towards EU membership.
- There is a notable rise within the population that declares exclusive identity.
- 80% of SDSM sympathisers are in favour of EU membership.
- There is a notable decline in the support for EU membership among SDSM sympathisers.
- EU membership is supported by a majority of VMRO-DPMNE sympathizers.
- The percentage of Eurosceptic attitudes among VMRO-DPMNE supporters is declining.
- There are significant disparities between the perceptions of the supporters of the two political parties on the state of the EU accession process.
- 66% of SDSM voters think that the country has progressed in the European integration process in 2022. An almost equal percentage (62%) of VMRO-DPMNE supporters believe that the country has not progressed at all or that it has regressed in the past year.
- Majority of SDSM voters share the opinion that the country is ready for EU membership, more than 60% of VMRO-DPMNE supporters are convinced 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.

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 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.

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- 1 Damjanovski, Ivan. "Public opinion and Macedonia's accession to the European Union (2004-2014)", Konrad Adenauer Foundation / Institute for Democracy "Societas Civilis" – Skopje, 2014
 - 2 For a wider theoretical explication of the model, cf. *ibid*, pages 13-24

About the survey

This public opinion analysis on the Macedonian process of accession to the European Union conducted in 2022 is a continuation of the research done in 2014, 2016, 2017, 2018, 2019, 2020 and 2021. 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 2022 on a sample of 1005 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. 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 2014-2022.

General trends

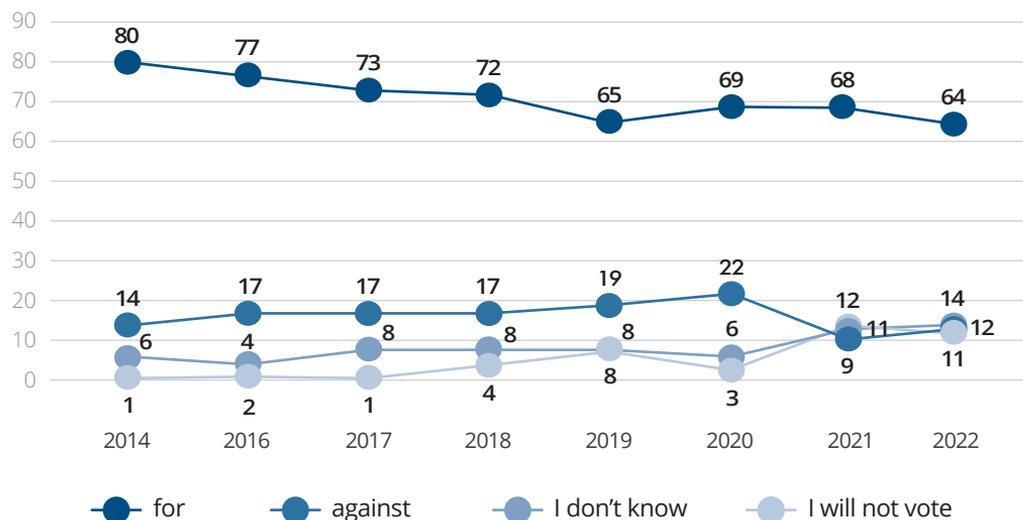
The low credibility of North Macedonia's EU accession perspective in the past decade has been the key factor behind the continuous decline of public support for EU membership in the country. These trends were initiated by the long-lasting Greek blockade of the accession process based on the name dispute 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, 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. However, progress in the accession negotiations in the short term is now conditioned with amendments of the Constitution vis-à-vis the recognition of Bulgarian minority, which at the time of writing does not have the support of the opposition parties whose votes are necessary to meet the threshold for Constitutional changes.

Having in mind the rather ambiguous nature of North Macedonia's EU accession process in 2022, it is interesting to see how it relates to the public support for EU membership. Generally speaking, the developments in 2022 have had a slight negative effect on public support for EU membership. In 2022, 64% of the population would vote positively for North Macedonia's membership in the EU at a hypothetical referendum (graph 1). That is 4% percent less than in 2021 and almost equaling the results from 2019, which has had the lowest values for positive support in the longitudinal dataset. This decline is most probably a consequence of the divisive effect on Macedonian society of the compromise that unlocked the accession negotiations, but also the uncertainty of the short-term outcomes of this process. However, these dynamics didn't have any effects on the Eurosceptic attitudes of the population. In 2022, only 11% of the population is openly Eurosceptic, which is a significant drop compared to the period 2018-2019 when the percentage of Eurosceptic votes reached the value of 20. In contrast, the frequencies regarding this variable are almost identical to the results from the previous year, as are the percentages of the population that is undecided (14%) or wouldn't vote (11%). The results from the past two years clearly indicate that that declining Eurosceptic energy in the country doesn't convert into more support for EU membership, but rather transitions into a growing number of undecided, even apathic respondents, which now constitute a quarter of the population.

Another important dimension of the public support for EU membership in Macedonian society is the breakdown of attitudes among the two biggest ethnic communities in the country, the Macedonians and the Albanians. There is a considerable gap between the two communities in the levels of support for EU membership which has been rather consistent in the past several years. Thus, 57% of ethnic Macedonians support EU membership, 6% less than in 2021. On the other hand, a significantly higher percent of Albanians (79%) are in favor of membership, 3% less than in 2021. In both cohorts there is a notable rise of the number undecided respondents when compared to the results from the past several years. On the other hand, there is a consistency in regard to educational achievement and income as positive predictors of support of EU integration. Hence, respondents with higher education and high income tend to be more supportive for the country's membership in the EU.

Graph 1³. If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



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

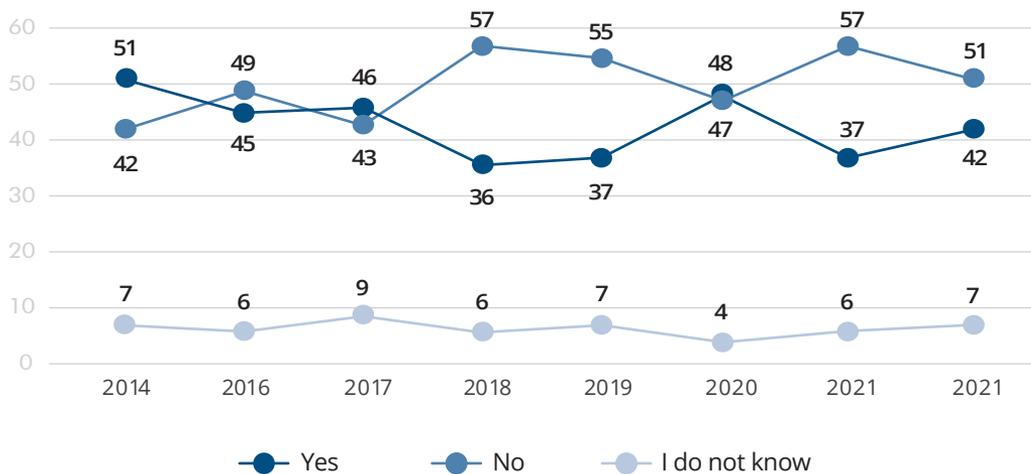
The results from the 2022 survey are highly consistent with the distribution of frequencies in the previous year also in regard to how much EU accession is personally important for the respondent (table 1). For more than half of the population EU membership is highly important, which as a value is significantly higher when compared to the period 2019-2020. Additional 20% attach some importance to EU membership. For roughly a quarter of the population, EU membership is not an important issue in their lives. As with the previous question, the inter-ethnic discrepancy is also present apropos this variable, as for 75% of the Albanians EU membership is highly important, which is 30% more than in the case of the ethnic Macedonian respondents. Conversely, a relatively high number of ethnic Macedonians (20%) do not attach any importance to the notion of North Macedonia becoming a member of the EU.

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

Unlike in the two previous cases, there is a significant longitudinal divergence in respondent attitudes on the assessment whether the country is sufficiently prepared to become a member of the EU. In 2022, there is a more realistic outlook on the level of preparedness of the country to enter the EU, as 42% of the population thinks that North Macedonia is ready for membership (graph 2). This value constitutes a drop of 15% compared to 2021. Conversely, the percentage of the population that thinks that the country is not ready for EU membership has exponentially increased by 14%, which means that for the first time in the time-frame of our longitudinal analysis roughly half of the population has been convinced that the country is not ready for membership. The inter-ethnic gap is also evident in this case as well. While 55% of the ethnic Albanians share the opinion that the country is ready for EU membership, almost 60% of the ethnic Macedonians are convinced in the opposite. The rather inconsistent longitudinal distribution of frequencies regarding this question solidifies the assumption that the 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.

Graph 2⁴. Do you believe that North Macedonia is ready for EU membership?



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%

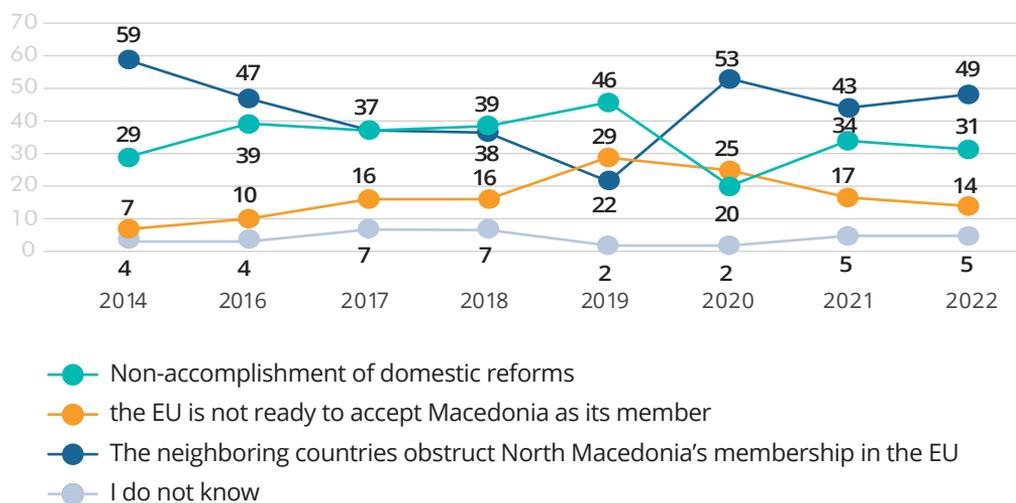
The results of the survey point towards a slight dissatisfaction with how much the country has progressed in the accession process in the past year. Generally speaking, a majority of the population has detected some progress in the EU integration process in the past year (table 2). While only 10% believe that the country has had considerable progress, 23% believe that the country has somewhat progressed, with an additional 20% that have detected limited progress. However, a third of the population shares the opinion that there has been no progress at all, while the number of respondents that think that the country has regressed in the accession process has grown from 4% in 2021 to 13% in 2022. The more pessimistic outlook among the ethnic Macedonians that was detected in the previous categories, is evident in this case as well. Thus, half of the ethnic Macedonian respondents think that the country has either not made any progress (34%), or it has regressed in the EU integration process (16%). In contrast, the ethnic Albanian community appears to be much more optimistic, as 70% of this population has detected progress in the accession process in the past year.

Table 2.

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

In line with expectations, almost half of the population indicates the obstructions from neighboring countries as the main barrier to EU membership (graph 3). Having in mind the deadlock in the accession negotiations that prevailed in the first half of 2022 and the controversy over the set of conditions imposed by the 'French proposal', these results are logical and consistent with previous trends in regard to this variable. On the other hand, a third of the population believes that the main culprit for the lack of success is to be found on the domestic end and inability of the state to provide a satisfactory track record of compliance with EU conditionality. On the other hand, since 2019, the number of respondents that blame EU's opposition towards enlargement as the main obstacle for membership has been consistently declining. In 2022, only 14% believe that North Macedonia is not a member of the EU due to EU's unwillingness to accept the country as a member. From a demographic standpoint, the distribution of frequencies is consistent with the general results across all categories.

Graph 3⁵. In your opinion, what is the most important reason why North Macedonia is still not a member of the EU?



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%

Finally, a more realistic trend can be observed in regard to the perceptions of when North Macedonia can be expected to become a member of the EU (table 3). In contrast to the rather optimistic outlook in 2020, a growing number of respondents (more than a third in 2022) believe in a 10 to 20 years period as a viable timeframe for obtaining membership. At the same time there is a notable increase in pessimistic perceptions as for the first time in the longitudinal scope of the survey, the percentage of respondents that think that North Macedonia will never become a member of the EU has reached the 30% threshold. On the other hand, although in lesser numbers than in the previous years, almost a third of the population shares a rather unrealistic expectation of EU membership in the next 3 to five years. The longitudinal results clearly indicate a clear lack of information and awareness among a considerable part of the population in regard to the normative and operational aspects of EU's enlargement policy, the dynamics of the accession process and the length of the accession negotiations.

Table 3.

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

DETERMINANTS OF SUPPORT FOR THE EUROPEAN INTEGRATION PROCESS

Rationalist-utilitarian factors

Previous public opinion research on the determinants of support for European integration in North Macedonia has established a firm correlation between rationalist-utilitarian factors and positive attitudes towards EU membership. In sum, the supporters of the country's bid for membership into the EU form their opinions on this topic on the 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.

The validity of this argument has once again been proven by the results of the 2022 survey. As can be seen in table 4, the distribution of materialist factors as predictors of support for EU membership has been very consistent in the past four years. When combined, rationalist-utilitarian factors which are based on anticipation of future material gains from the European integration process, become the underlying -reasoning for the majority of the population that supports EU membership. Thus, the most frequent reason (23%) for the decision to support EU membership is the expectation that it will improve the standard of living in the country in the future. 18% of respondents base their decision to support the EU integration process on the predicament that it will result with reduction of unemployment, while additional 15% see economic opportunities to emigrate and seek jobs abroad. On the other hand, a significant part of the population continuously bases its support for EU membership on non-materialist expectations. Thus, 20%

of those respondents that support North Macedonia's goal to become an EU member state point towards the expectations of more security and stability in the country as the main reason for their support. As smaller portion of respondents believe that the EU integration process will improve the state 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 %
Improvement of the standard of living	29	46	51	36	22	21	23	23
Reduction of unemployment	26	17	23	22	18	19	16	18
Improvement of democracy	10	5	7	9	13	13	14	12
Mobility of workers/easier access to jobs abroad	3	10	5	6	15	16	14	15
A sense of belonging to "the European family of countries"	2	5	2	4	13	13	12	11
Improved security and stability of the country	27	16	12	23	19	19	20	20
I do not know / refuses to answer	2	1	1	1	0	0	0	1

In a similar vein, a majority of the population believes that the biggest positive effects of the EU integration process will come in the economic domain (table 5). Economic development (21%), quality of life (18%), reduction of unemployment (17%), and improvement of infrastructure (9%) are key economic variables that are expected to be positively affected by future membership in the EU. On the other hand, there is a rising percentage of respondents (17%) that favor increased stability as the most important gain from the European integration process.

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

Identity and value-based factors

Whilst material factors have been established as the primary determinants of support for EU membership in North Macedonia, we are also witnessing a process of consolidation of the type of factors that primarily influence 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. The analysis of results of the 2022 survey solidifies this assumption. Only 22% of the Eurosceptic respondents base their opposition towards the EU accession process on perception of threats to the Macedonian economy or fears of deterioration of the standard of living that would occur because of EU membership. On the contrary, fears of loss of national identity (17%), protest over the change of the constitutional name of the country which came as a consequence of the Prespa agreement (16%), perceptions of rejection from the EU (16%) and fear of loss of sovereignty come as the more frequent predictors of Eurosceptic attitudes in the dataset.

Table 6.

What is the reason for your vote against EU membership?	2019 %	2020 %	2021 %	2022 %
Deterioration of the standard of living	12	9	13	11
Threats to the Macedonian economy	7	9	13	11
Change of the constitutional name of the country	21	20	16	16
Loss of national identity	17	23	14	17
We will become dependent on Brussels	10	9	12	11
Loss of sovereignty and independence of the country	17	19	11	15
EU does not want us	16	11	20	16
I do not know / refuses to answer	0	0	0	2

On the other hand, the recent controversies with North Macedonia's accession process and the introduction of another set of conditions based on questions of national identity, could have had a certain effect on the self-perception of the Macedonian population in relation to their identity. As can be seen in table 7, there are significant shifts in the distribution of attitudes in 2022 when compared to 2021. There is a notable rise within the population that declares exclusive identity. Thus, 77% of respondents (17% more than the previous year) identify themselves only as members of one ethnic group, i.e. exclusively as Macedonian, Albanian, or as a member of another ethnic group. Conversely, the percentage of citizens that declare dual identity i.e. ethnic and European has dropped from 25% in 2021 to 13% in 2022. The number of respondents that put their European identity first or have self-perceptions of exclusive European identity remain insignificant (at 3% each). However, the general distribution of attitudes is not even across all demographic categories. Consequently, while a vast majority of ethnic Macedonians (88%) declare themselves through the lens of one ethnic identity, the same sentiment is shared by 52% of the Albanians. An additional 26% among this cohort perceive themselves as both Albanian and European.

Table 7.

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

Finally, the longitudinal data from our survey show that exclusive ethno-national identity does not significantly increase Eurosceptic perceptions among that cohort. Thus, as in previous years, the distribution of attitudes among this group is very similar to the general distribution shown in graph 1. However, in contrast to the previous year, the respondents that declare dual identity, ethnic and European, are even more favorable of EU membership.

Cues from political parties

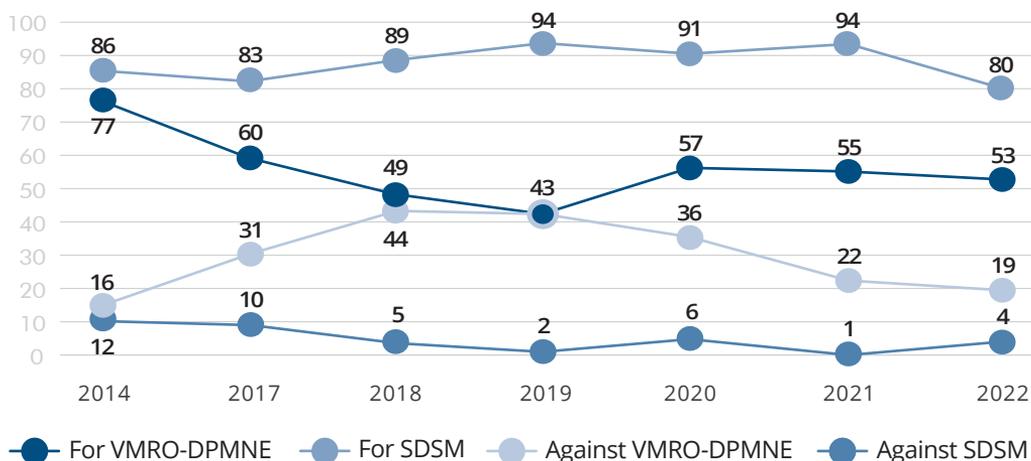
Finally, we measure the impact of cues from political parties as factors of attitude formation regarding the European integration process in North Macedonia. The role of party cues as predictors of public opinion is based on the hypothesis that due to informational deficits on complex political processes 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, has 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. This assumption is generally confirmed, as SDSM sympathizers are more in favor of EU membership compared to VMRO-DPMNE voters (graph 7). However, when compared to the previous year there is a notable decline in the support for EU membership among SDSM sympathizers. Although still very high at 80%, the number of SDSM supporters that support EU membership has dropped by 14%, most probably as a consequence of the polarizing effects of the developments in the accession process in 2022. The distribution of attitudes among the VMRO-DPMNE supporters is much more consistent with results from the previous year. A slight majority within this cohort supports North Macedonia's orientation towards membership in the EU. The trend among Eurosceptic respondents appears to be on a stabilizing track as the numbers in the past two years have been trending in a downward direction (from 22% in 2021 to 19% in 2022).

Graph 4⁶. 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 biggest 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 attitudes across other variables covered in the survey. Similarly to the previous year, there is a significant divergence in the assessment of the progress achieved in the accession process in the past year. While 66% of SDSM voters think that the country has progressed in the European integration process in 2022, an almost equal percentage (62%) 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 a majority of SDSM voters share the opinion that the country is ready for EU membership, more than 60% of VMRO-DPMNE supporters are convinced 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.

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Information about IDSCS

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

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