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EU integrations in the shadow of the internal processes – Public opinion analysis for 2023

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Key findings

- A third of the respondents (33%) believe that the negotiation process is still about harmonization of the legislation and standards with those of the EU, and only 11% see it as a process which is about satisfying the conditions imposed by our neighbors. Every fifth responder believes that the process encompasses both given options.
- The view that the negotiation process is equal to harmonization of legislation and to EU standards grows proportionally with the increasing level of education.
- Ethnic communities are divided over the question of whether the EU will be ready to accept the countries of the Western Balkans by 2030. 50% of the ethnic Macedonians do not believe that the EU will be ready, compared to 68% of the ethnic Albanians who believe in that statement.
- Only 24% of the respondents agree with meeting the commitment if that would mean continuation of the integration process – which is to change the Constitution for the purpose of inclusion of the Bulgarian minority.
- Every third respondent has no opinion on whether the European flag is used correctly or abused.
- Almost two-thirds (65%) of the respondents believe that the amendments to the Criminal Code were adopted to protect the political elites from past criminal acts.
- Half of the respondents (51%) agree with the statement that North Macedonia belongs neither to the East nor to the West.
- In contrast to the EU, the perception about the influence of the United States has grown over the last six years. This year, 60% of citizens believe that the USA is the factor with the greatest influence.

- Although citizens do not see it as the biggest influencing factor, the EU continues to dominate the question of who is the best ally. The results of this year reveal that 33% of citizens believe that the European Union is the best ally of the country, followed by the United States which was indicated as an ally by 20% of the respondents.
- Almost half of the respondents (48%) believe that the greatest economic support should come from the EU.

Introduction

The Institute for Democracy (IDSCS) and the Konrad Adenauer Foundation (KAS) have been conducting national surveys since 2016, using a representative sample, on issues relevant to the process of integration of North Macedonia into the European Union (EU). The questionnaire includes questions that are perpetuated every year in order to identify trends over the years and the issues that relate to current political developments. In particular, this edition of the survey examines the public opinion on current issues related to the European integration process, including the commitments necessary to continue the negotiation process with the EU, the existing tools for harmonizing Macedonian legislation with the European one and the general perception about the negotiation process. Aside from the negotiation process, the survey also aims to consider citizens' opinion on external factors that are seen as influences, allies, economic partners and donors. The data allow us to make a comparative analysis of the trends present in the public opinion, and at the same time to understand the general attitude towards the most current issues in the given year. For the purpose of a more detailed analysis, each question is monitored, among other parameters, in terms of political orientation and ethnicity of the respondents. The findings of the analysis are summarized in a total of three categories: 1) *The negotiation process through the lens of the citizen* 2) *Alignment with EU legislation and standards – truth or myth?* 3) *External factors and influences*

The survey was conducted using telephone interviews during November 2023, with a nationally representative sample consisted of 1000 respondents.

Overview of political developments

This year ends without a drastic shift in the European integration path. Following the first Intergovernmental Conference¹ (IGC) in July 2022 when the negotiations for membership in the European Union (EU) were conditionally opened, the country continued to fulfill the obligations that follow in the process. During 2023, representatives of the state administration from the relevant ministries attended an explanatory and bilateral screening process in Brussels, after the completion of which the opening of clusters shall begin. This next step – the opening of clusters – is possible only following changes in the Constitution that are about inclusion of the Bulgarian minority in the Preamble of the Constitution as a constituent people of the country. If this obligation is not met, but also other obligations undertaken by signing the second bilateral Protocol between Bulgaria and North Macedonia² a few days before the first Intergovernmental Conference, the country will not be able to open the "Fundamentals" cluster. In order to prepare for the constitutional amendments, a working group was established in April 2023. It unanimously approved a draft initiative which proposed these changes and submitted it to the Government in May 2023, and the same initiative was later submitted to the Parliament³ as well. The constitutional amendments proposed in the initiative provide also included six additional ethnic communities, including the Bulgarian people, the Croatian people, the Montenegrin people, the Slovenian people, the Jewish people and the Egyptian people in the Preamble and in two articles of the Constitution⁴. In August, a plenary session was held for adoption of the initiative to amend the Constitution, but it was put on hold because the required two-thirds majority was not possible to be secured.⁵

In addition to the political requirements, the fulfillment of which is currently uncertain, the EU monitors the progress of the country in implementing the reform agenda. This was noted in the Report of the European Commission (EC) on North Macedonia for 2023⁶. It caused an avalanche of reactions in the public. On the one hand, for the Government, the Report points that the pace of progress in the process has been maintained, and highlights the internal and external challenges of

¹ European Commission (2022) First Intergovernmental Conference between Albania and North Macedonia for the start of negotiations. [Линк](#)

² Ministry of Foreign Affairs of North Macedonia, Minutes of the second meeting of the joint intergovernmental commission, signed on July 17, 2022, available at [линк](#)

³ Ministry of Justice, Decision on establishment of a working group for the Proposal - initiative on the need for amendments to the Constitution of the Republic of North Macedonia, available at <https://shorturl.at/kuCU2>

⁴ Government of the Republic of North Macedonia, Proposal for Amendments to the Constitution - Guidelines for Amending and Supplementing the Constitution of the Republic of North Macedonia, available at <https://shorturl.at/evC19>

⁵ Assembly of the Republic of North Macedonia, Public Announcement, available at <https://shorturl.at/fiGNZ>

⁶ Secretariat for European Affairs, Report of the European Commission on North Macedonia available at <https://www.sep.gov.mk/post/?id=5657>

the country⁷. On the other hand, for the opposition, the Report points to corruption and institutional negligence for implementation of reforms⁸.

In the focus of this year's Report, the EC appeals for political consensus and unity from all political factors, but it also highlights weaknesses in the judiciary, public administration, and also emphasizes the political polarization, especially within the work of the Parliament. In addition to the criticism aimed at the debate in the Parliament, the same criticism was addressed towards the tools used to harmonize the legislation with the EU. The Commission assesses that the use of the European flag, or the tool for reducing the procedure for laws that are about harmonization of legislation and standards with the EU is, for many laws, excessive and in many cases unnecessary. According to the EC, it should be used exceptionally in cases where there is a direct connection with the European regulation, and not to circumvent and cut short the procedure for adopting laws. During the year, the Parliament managed to secure a Parliamentary majority for several debatable laws, while avoiding a broad debate with the opposition by using the European flag. This procedure was used for amendments to the Criminal Code, which set the statute of limitations for a large number of cases against officials who were accused of corrupt actions, and five laws that accelerated the process for construction of Corridor 8 and Corridor 10. On this issue there were also reactions from the Delegation of the European Union in Skopje.⁹

Apart from the internal political and reform processes that are following the negotiation process, the country remained fully harmonized with the EU's foreign policy, including the sanctions against Russia because of the war in Ukraine¹⁰. Such harmonization confirms the country's position to fit and align with the values and policies of the Union.

Although the war in Ukraine remained the focus of the Union's foreign policy, confirmed by the EC's recommendation for opening of negotiations with Ukraine and Moldova and granting the candidate status to Georgia, the foreign policy was also focused on the enlargement towards the Western Balkan countries (WB)¹¹. This year, the President of the European Council, Charles Michel, said that the EU and the countries of the WB should be ready for enlargement by 2030.¹² This statement is

⁷ Government of the Republic of North Macedonia, Public announcement, available at <https://vlada.mk/node/30514>

⁸ VMRO-DPMNE, Public announcement, available at <https://shorturl.at/bkHQU>

⁹ MIA, Amendments to the Criminal Code were adopted, their "justification" is subject to public discussion, available at <https://shorturl.at/hoxK7>

¹⁰ European Parliament, EU sanctions against Russia, compliance of the candidate countries, available at <https://shorturl.at/lqz11>

¹¹ Damjanovski et al. 2023, The New Reality – The War in Ukraine and the Western Balkans – EU Enlargement Process, available at <https://shorturl.at/aAFLR>

¹² European Council, Press Release, Statement by Charles Michel at the Bled Strategic Forum 2023, available at <https://shorturl.at/ntUV7>

the first of its kind by a high representative of the Union, after 2018, when the EC announced the Enlargement Strategy with the countries of the Western Balkans until 2025¹³. However, this time-specific attitude, as well as the general vision for the Union's enlargement policy, is diverse among European leaders. For many of them, including the French president and the German chancellor¹⁴, enlargement is not possible without reforming the Union. According to these views, Franco-German experts translated their reform ideas into a document in which the possibility of multi-level accession to the Union is considered. This would mean that the countries of the Western Balkans could access the economic and market policies of the Union, but not the political ones.

All these political developments at home and abroad directly shaped the public opinion this year. In the following part we are exploring all the developments through the lens of the public opinion.

¹³ Secretariat for European Affairs, European Commission's Strategy for Enlargement with the countries of the Western Balkans until 2025, available at <https://www.sep.gov.mk/post/?id=2224>

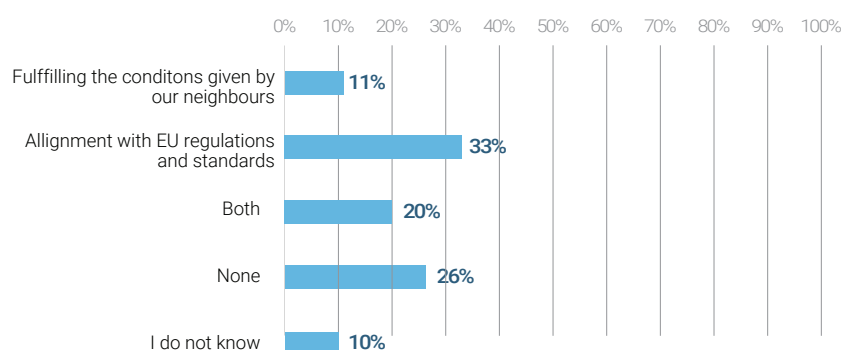
¹⁴ Politico, Macron: EU should be ready for 'Europe at multiple speeds' to cope with enlargement, available at <https://shorturl.at/aCGNU>

The negotiation process through the lens of citizens

Following the adoption of the negotiation framework and the formal start of the negotiations, the country must fulfill its commitments under the Protocol signed with Bulgaria. The most significant commitment is the opening of the Constitution for inclusion of the Bulgarian minority. During this year, this issue was discussed at a Parliamentary hearing, but due to the lack of consensus, it was not put to a vote. This procedure has been on hold ever since. The political issues are the most prominent parts of the process, at the expense of the technical aspects and the reforms foreseen by the Copenhagen criteria. For those reasons, in the next part of this analysis we investigate the perception about the negotiation process among the citizens.

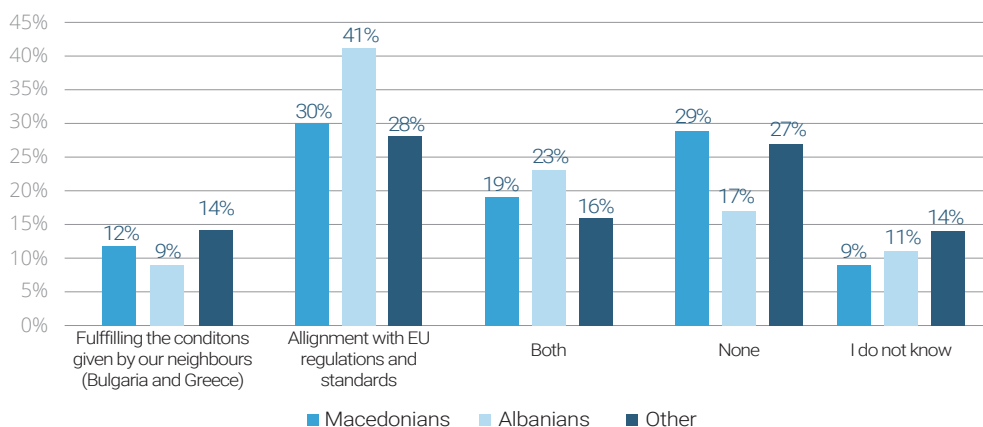
To begin with, we consider the general perception of the citizens about the process.

How do you perceive the EU negotiation process?



During these years, the accession to the EU gained a significantly greater political importance, as opposed to the technical one, which includes internal reforms and harmonization of the legislation and standards with those of the Union. Despite the political challenges that preceded it, a third of the respondents (33%) believe that the process still is about harmonization of legislation and standards with those of the EU, and only 11% see it as satisfying the conditions imposed by our neighbors. 26% of the respondents think that the process is neither harmonizing nor satisfying the conditions of the neighbors are on the opposite sides with fifth of the respondents (20%) who consider that the process includes both offered options. These percentages may indicate a partial misunderstanding of the process itself for various reasons. The reasons may include inadequate education or information about the process, or the length of the process itself contributes to citizens not having a clear perception of what actually constitutes a negotiation.

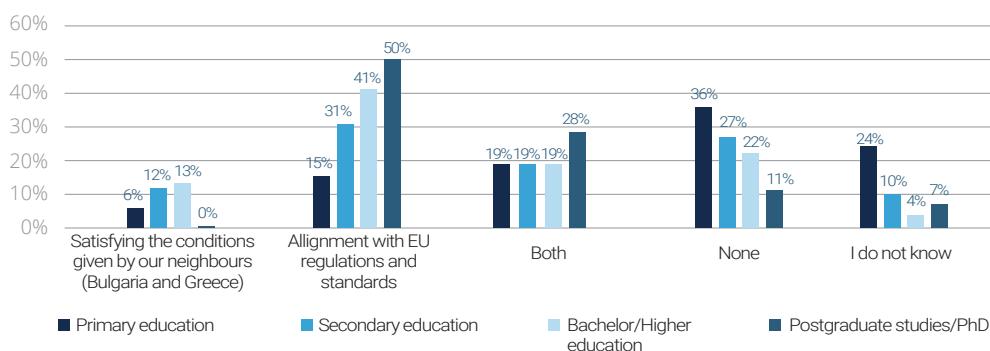
How do you perceive the EU negotiation process? (ethnic background of the respondents)



41% of the ethnic Albanian respondents see the process as harmonization with the European legislation, and 30% of the ethnic Macedonian respondents agree with it. An almost equal number of ethnic Macedonian respondents (29%) do not consider that the process is neither harmonizing nor satisfying the demands of the neighbors.

How do you perceive the EU negotiation process? (educational background)

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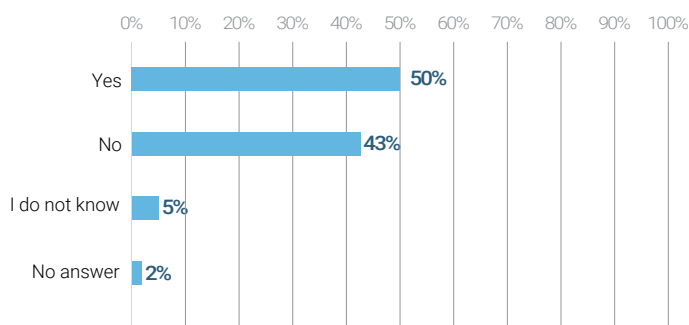
The results monitored in terms of level of education of the respondents, show that the level of education grows proportionally with the perception of the process as harmonization of the legislation. None of the respondents with post-graduate education, PhD or higher believe that process equals fulfillment of the neighbors' conditions. 50% of respondents with them and 41%

¹⁵ The percentage of participants who have completed postgraduate studies/doctorate or specialization is not equal to 100% because the component 'other' has not been calculated.

with completed Bachelor studies see the process as harmonization with the European legislation. The level of higher education shows that these respondents have a greater perception about the technical and reform side of the process, as opposed to the political one.

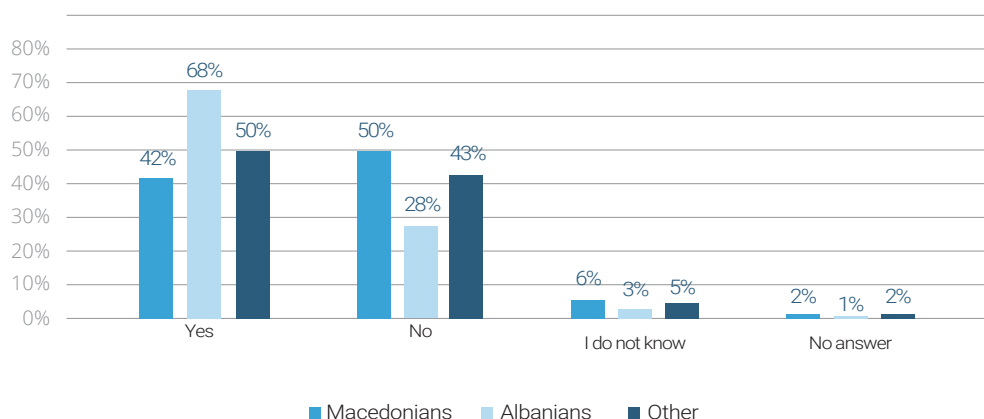
After obtaining the general perception about the process itself, the next part delves into the citizens' perception in the time-frame of the process.

Do you believe that the European Union will be ready to accept the countries of the Western Balkans as members by 2030?



Vague statements with timelines accompanied by proposals for various steps of accession to the Union are reflected in a quite divided opinion of the citizens. Although majority of the respondents (50%) optimistically believe that the EU will be ready to accept the countries of the Western Balkans as members by 2030, slightly smaller number (43%) of the respondents do not believe that the EU will be ready.

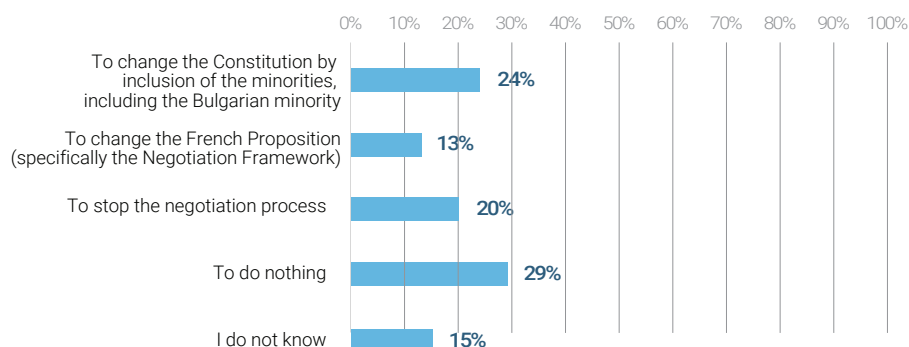
Do you believe that the European Union will be ready to accept the countries of the Western Balkans as members by 2030? (ethnic background)



If we consider this question in terms of ethnicity, a difference can be identified between ethnic Macedonians and Albanians. 50% of the ethnic Macedonians do not believe that the EU will be ready, compared to 68% of ethnic Albanians who believe that the EU will be ready to accept the countries of the Western Balkans as members by 2030.

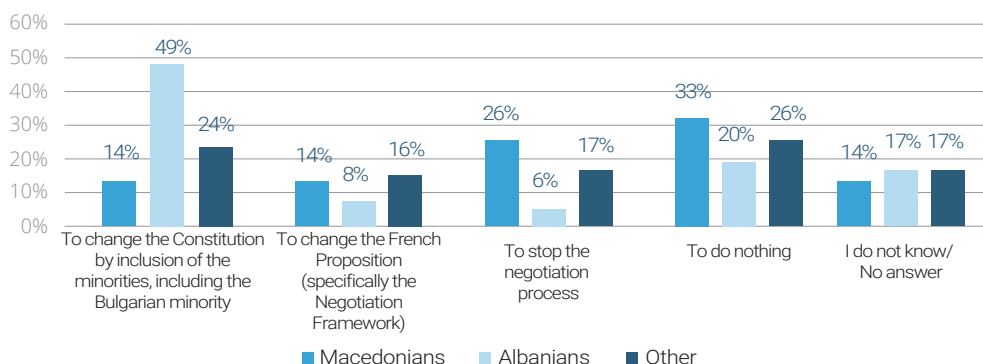
Apart from the general perception of the citizens about the negotiations and the time frame, the country should take concrete steps in order to continue its European integration path.

Which changes you think North Macedonia should make on its path towards the European Union?



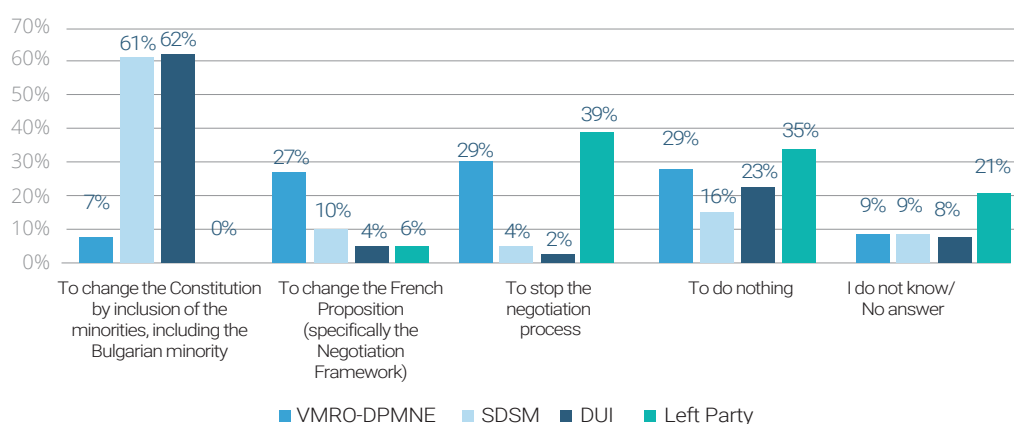
Citizens do not have a clear understanding of the next steps that the country should take in the process. The results about this question indicate a division in thinking. 24% of the respondents agree with the obligation which is mandatory if we want to continue with the process – change the Constitution in order to include the Bulgarian minority. However, despite the necessity of this obligation, the largest percentage of the respondents (29%) believe that the country should not take any action in the negotiation process, followed by 20% of the respondents who have a more radical attitude of inaction, or rather stopping the process.

Which changes you think North Macedonia should make on its path towards the European Union? (ethnic background)



A relatively low percentage of ethnic Macedonians (14%) support the change of the Constitution with the inclusion of new minorities, including the Bulgarian minority. In contrast, half of the ethnic Albanian respondents (49%) support these amendments. A notable percentage of ethnic Macedonians (26%) express a desire to stop the negotiation process, as opposed to ethnic Albanians who show the lowest level of support for stopping the negotiation process (6%). Every third ethnic Macedonian believes that the country should do nothing on the way to the EU. 20% of the ethnic Albanians also agree with this attitude.

Which changes you think North Macedonia should make on its path towards the European Union? (political affiliation)



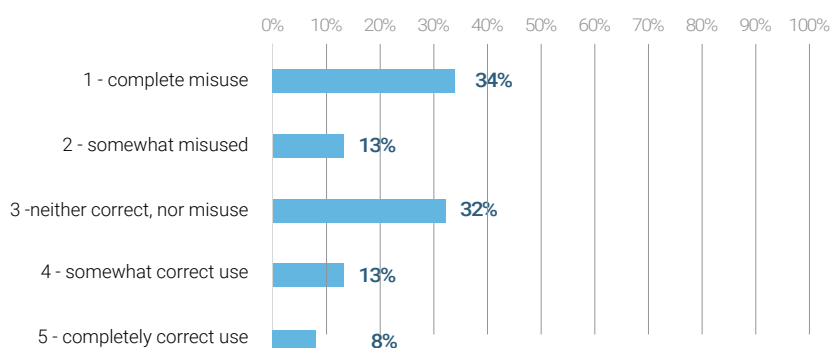
In terms of political party they would vote for in the next elections, there are big differences between the respondents. The majority of respondents who identify with SDSM (61%) and DUI (62%) believe that the constitutional amendments should be implemented, compared to only 7% of respondents who, if elections were held tomorrow, would vote for VMRO-DPMNE. Such views are in accordance with the views of the political leaders of these parties. The opposition led by VMRO-DPMNE is against the constitutional amendments, as opposed to the government led by SDSM and DUI, which believe that they are necessary for the negotiation process.

Harmonization with EU legislation and standards – truth or myth?

In addition to the political challenges, the analysis showed that every third citizen continues to see the process as a process which is about harmonization with European legislation and standards. The achievement of this objective is realized via the so-called "European flag" procedure that is available to MPs in the Parliament. The use of this procedure was in focus this year because it was used in several controversial laws.

In the next part, we investigate the opinion of the citizens about this procedure and the purpose of adopting the amendments to the Criminal Code, as one of the most discussed laws adopted with a European flag.

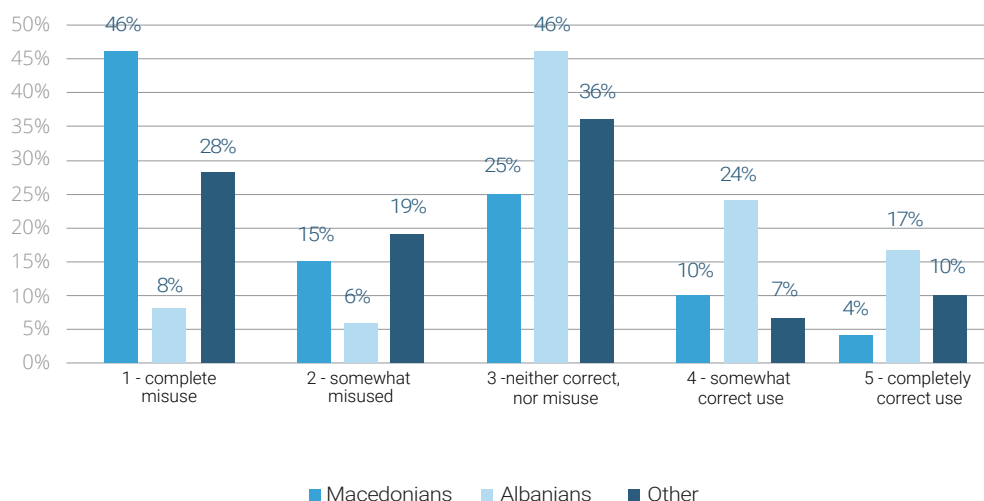
On a scale from 1 to 5, how do you see the use of the European flag?



The data about the general perception of the citizens on the use of the European flag shows that the respondents have a divided opinion. Half of the respondents (47% - where 34% completely, 13% to some extent) note a degree of abuse of the flag, compared to only 21% of respondents (13% say it is somewhat correct, 8% say it is completely correct) who note a degree of correct use of the EU flag procedure. Almost a third of the respondents (32%) have a neutral attitude towards this issue, which may indicate lack of information among the citizens about the purpose and method of use.

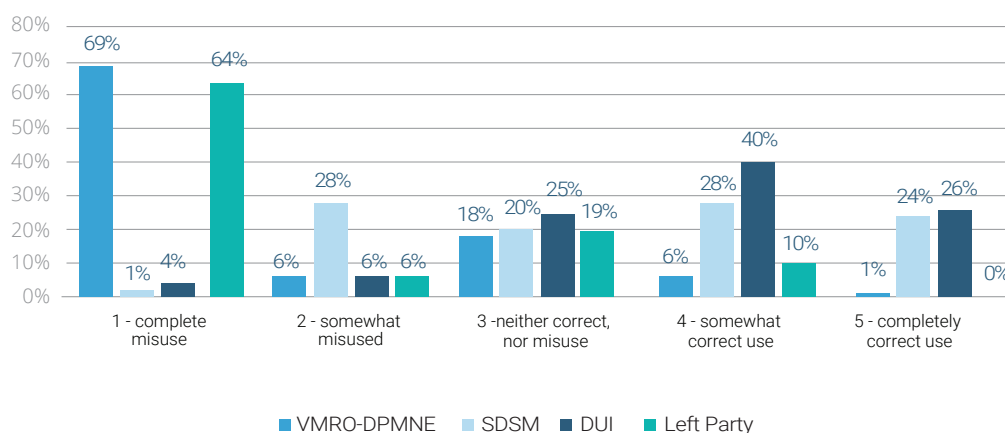
If we follow this question along other parameters, such as ethnicity and political affiliation, we can see diversity in attitudes.

**On a scale from 1 to 5, how do you see the use of the European flag?
(ethnic background)**



The largest percentage of ethnic Macedonians (46%) believe that the European flag is completely abused, followed by 15% who see a degree of abuse. In contrast, the same percentage of ethnic Albanians or 46% believe that the European flag is neither abused nor used correctly, and 51% (24% to some extent and 17% completely) indicate that the procedure is used correctly to a certain extent.

**On a scale from 1 to 5, how do you see the use of the European flag?
(political affiliation)**

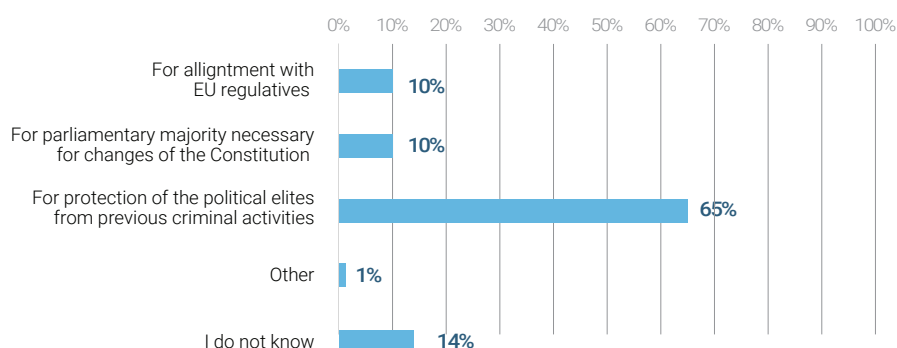


A big difference between the ruling and opposition parties was detected. 40% of DUI supporters and 28% of SDSM voters believe that the European flag is used correctly, while a strong majority (69%) of supporters of the largest opposition party VMRO-DPMNE believe that the use of the European flag is completely abused. A high percentage (64%) of the Levica voters share the same opinion.

A publicly exposed example of the use of the European flag are the amendments to the Criminal Code. The voted amendments include reduction of the prison sentences for abuse of official position for personal gain, the possibility of early statute of limitations, deletion of Articles from the Criminal Code that provide for penalties for abuse of public procurement, damage to the Budget of the country, and lower penalties are also proposed for the criminal act of criminal association.

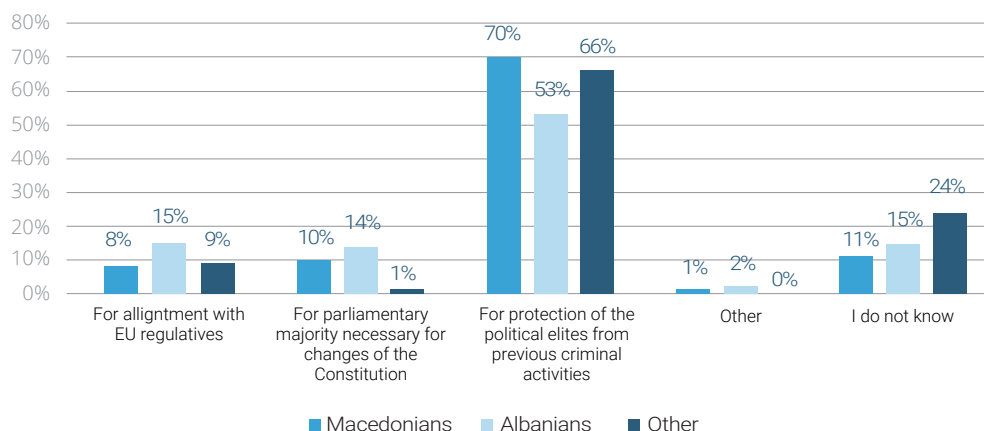
The following question analyzes the citizens' opinion on the reasons for adoption of the amendments to the Criminal Code which, according to the adoption procedure, are made with the aim of harmonization with the EU legislation.

Why do you think the changes in Criminal Code were adopted?



Although the respondents show a divided attitude for most of the questions, they reach a sort of consensus regarding the reasons for adoption of the changes. In fact, almost two-thirds (65%) of the respondents believe that the amendments to the Criminal Code were adopted to protect the political elites from past criminal acts.

Why do you think the changes in Criminal Code were adopted? (ethnic background)



70% of the ethnic Macedonians, 53% of the ethnic Albanians, but also 66% of the other ethnic communities say that the amendments to the Criminal Code were adopted to protect the political elites from past crimes.

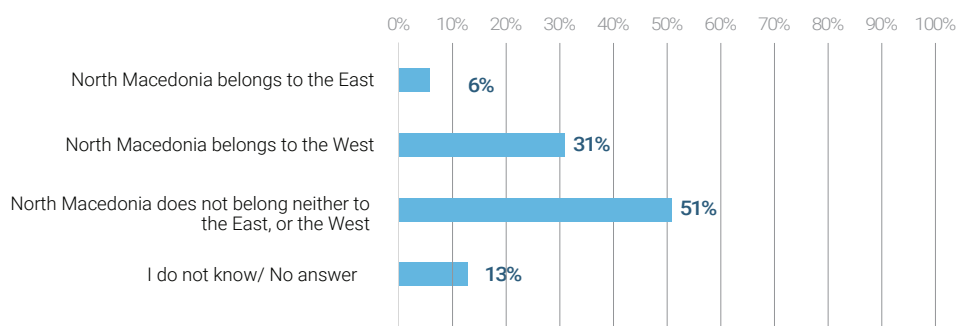
In contrast to the procedure for adoption of the amendments, which aims to harmonize the legislation, the citizens, regardless of their ethnicity, recognize that in this particular case the intentions for adoption of the amendments are different – in other words, the intentions are to protect the political elites.

External factors and influences

The efforts of the governments over the years to bring the country closer to the EU and the desire of the citizens to become part of the European family consequently position the country in line with the policies of the Union. However, the great challenges the country is undergoing, the concessions that were made, as well as the length of the process for full membership – all call into question the credibility of the EU in the eyes of the citizens. Alternatives to the EU are often mentioned, and the analysis showed that a significant number of citizens would like a full termination of the negotiations. For those reasons, in the next section we analyze the citizens' perception about the external factors that influence the country in some way.

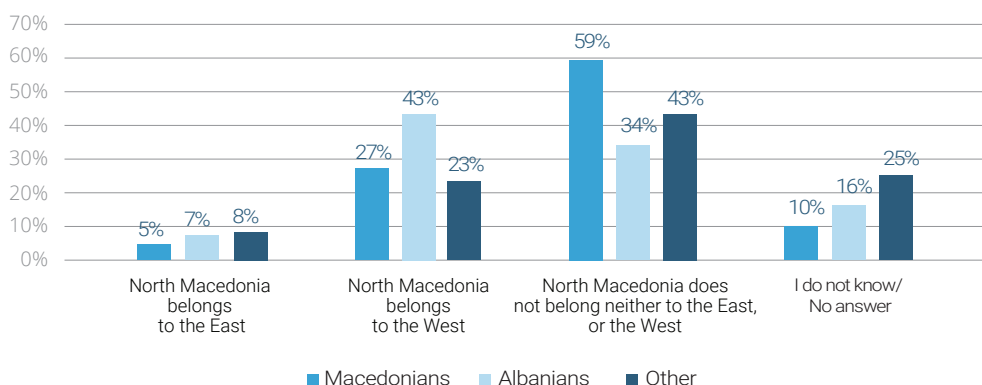
Starting from the general perception, in the following section we investigate the public opinion regarding the general orientation of the country.

Which statement do you agree with?



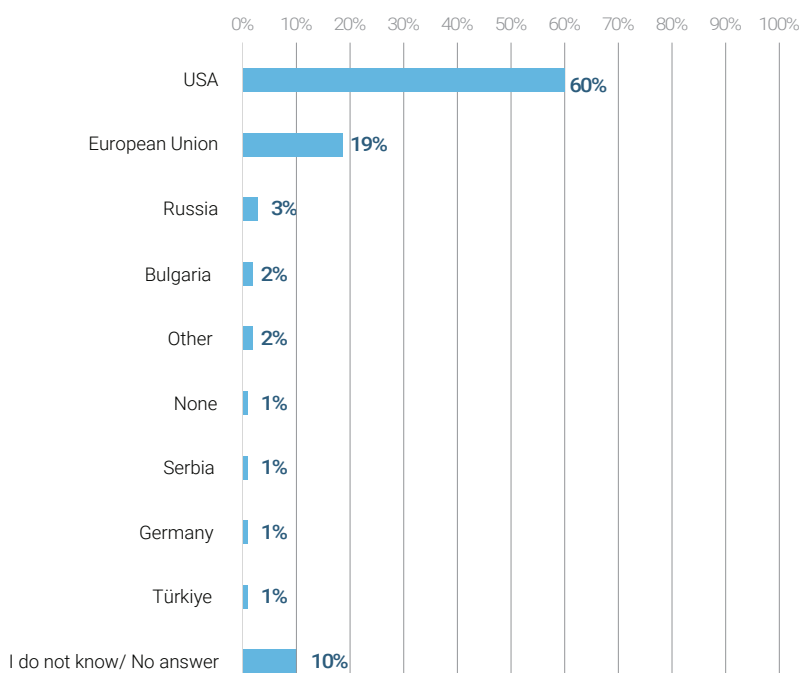
The majority of citizens (51%) agree with the statement that the country belongs neither to the East nor to the West. Such a neutral attitude can be interpreted as support for the idea of independence and neutrality of the country, which can be related to the desire to preserve one's own identity and autonomy. In addition, such neutrality can be connected to the blockades imposed by EU member states over the years, as opposed to having no other alternative, which creates a feeling of not belonging to a certain bloc. According to them, almost a third of the respondents (31%) believe that North Macedonia belongs to the West, which is in accordance with the aspirations of the citizens for entry into the EU, in contrast to the small number of respondents (only 6%) who believe that the country belongs to the East.

Which statement do you agree with? (ethnic background)



In terms of ethnicity, a solid majority of ethnic Macedonian respondents support a neutral attitude, in contrast to 43% of the ethnic Albanian respondents who believe that North Macedonia belongs to the West.

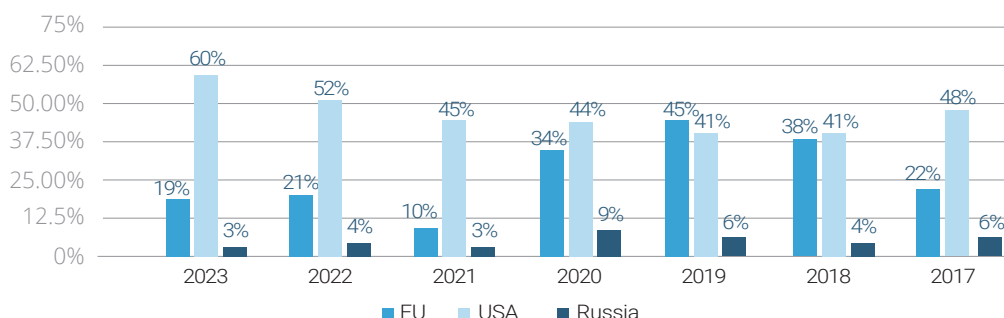
In your opinion, which external factor has the greatest influence in our country?



When it comes to influence perceived by the citizens, the United States remains the most influential factor in the country with 60% of the respondents agreeing with this view. The EU is ranked significantly lower – only 19% of the respondents consider it as a factor of influence. Apart from the USA and the EU, 10% of the respondents do not know how to identify the most influential factor.

In your opinion, which external factor has the greatest influence in our country? (historical overview)

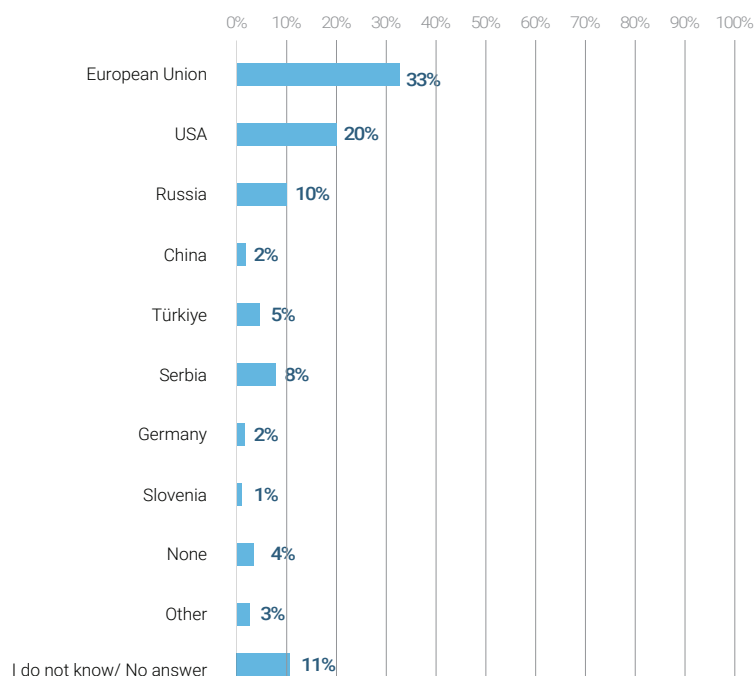
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This year's analysis shows a slight drop in the perception about the EU to 19% from 21% last year. In 2019, before the veto imposed by Bulgaria, and after the name change and thus the release of the veto from Greece, the EU recorded the highest confidence as a factor of influence (45%). In the following years, this perception decreases and has not managed to recover until today. In contrast to the EU, the perception of the influence of the United States has grown over the last six years. In the seven years of conducting this survey, this year's results show that most of the respondents (60%) consider the United States to be the factor with the greatest influence.

¹⁶ The total percentage does not equal to a 100% because the countries with that were voted with less than 3% are not included in the charts.

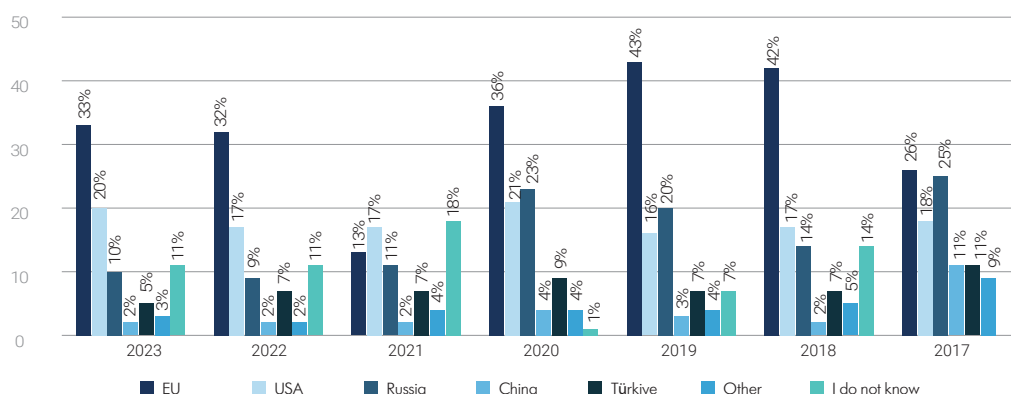
In your opinion, who is the greatest ally of our country?



Although the citizens do not see it as the biggest influencing factor, they still consider the EU to be our best ally. The results of this year reveal that 33% of citizens believe that the European Union is the best ally of the country, followed by the United States which was indicated as an ally by 20% of the respondents.

In your opinion, who is the greatest ally of our country? (historical overview)

17

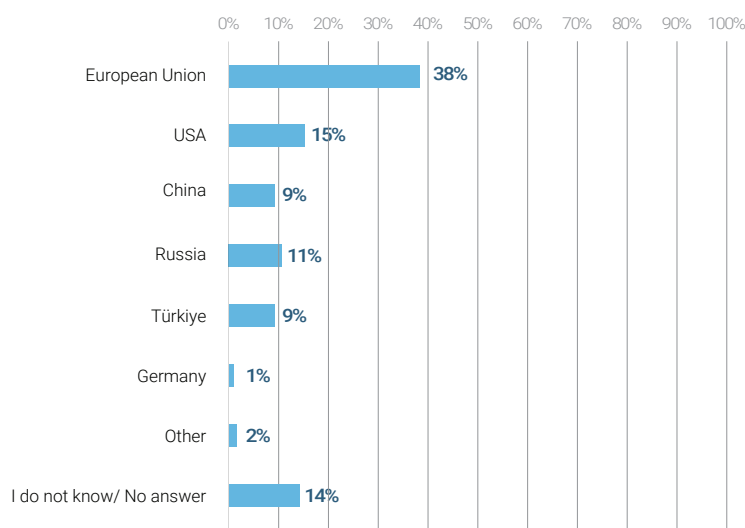


¹⁷ The percentages for the years 2021, 2022, and 2023 are not equal to 100% because the comparison chart from previous years did not take into account the other countries mentioned by the participants (e.g., Germany, Serbia, none)

Compared to the last year (32%), this year the citizens have an unchanged attitude towards the EU as the biggest ally (33%). The view about the USA as the biggest ally shows a slight increase of respondents who agree with such statement (20% in 2023, 17% in 2022). Throughout the years, the percentage of citizens who cannot identify an ally of the country remains.

Citizens feel that the external support is the most important things when it comes to improvement of the economic situation. In the following part, we look at their perception of who should be Macedonia's main economic partner and biggest donor.

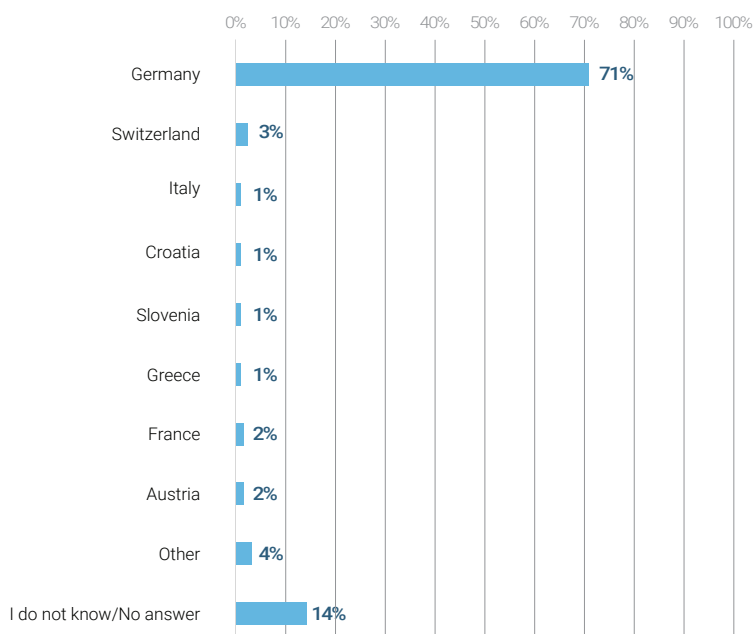
Who do you think should be the main economic partner of our country?



More than one-third of the responders (38%) believe that the greatest economic support should come from the EU. It is followed by the USA with 15%, and by respondents who do not have an answer or do not want to answer with 14%. 11% of the respondents see Russia as the country's economic partner.¹⁸

¹⁸ Anamarija Velinovska, Europe in crisis - The consequences on the public opinion in North Macedonia https://idscs.org.mk/wp-content/uploads/2023/03/1_B5_Analiza_MKD-1.pdf

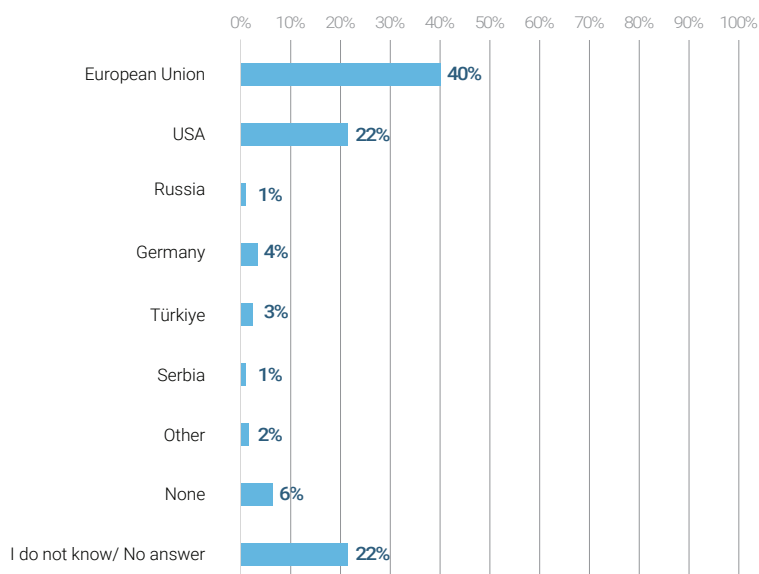
Which EU country you think should be the main economic partner?



In a more detailed analysis of the question, from all the respondents who gave their answer about the EU, 71% identify Germany as an EU member state that should be the main economic partner.

In addition to which external factor the citizens think should be the biggest economic partner, we also asked them who would they single out as the biggest donor.

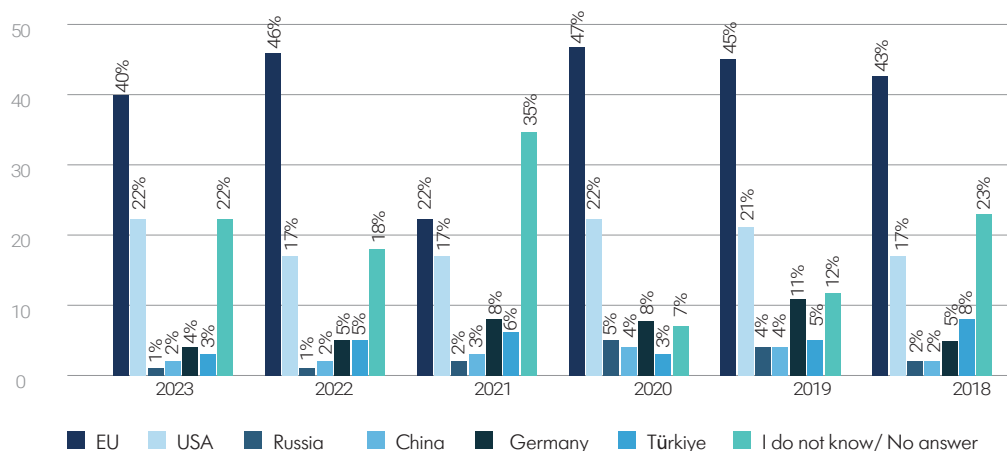
Who is the biggest donor in Macedonia (provides funds for development purposes)?



In terms of who is the biggest donor, the EU again dominates the answers – 40% of the citizens believe that the Union gives the most money for development. An equal percentage of citizens (22%) consider the USA to be the biggest donor, and the same percentage of 22% cannot identify such donor.

Who is the biggest donor in Macedonia (provides funds for development purposes)? (historical overview)

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Over the years, the EU is witnessing a continuous number of respondents who agree with this view. This year, the small drop in perception is at the expense of those who see the USA as the biggest donor and those who cannot identify such donor.

It is important to note that the number of citizens who cannot identify a donor increases every year, which indicates that the citizens do not see where the money is and where the development money comes from.

¹⁹ The percentages are not equal to 100% because not all mentioned countries in the responses are comparably represented across the years. (e.g., Germany, Serbia, none)

Conclusion

The past year witnessed insignificant changes on the foreign policy level, primarily due to the fact that, with the start of the negotiation process and the opening of the first intergovernmental conference, the process shifted to the domestic stage. We are expected to implement the constitutional amendments and the relevant reforms. The results this year showed that, although bilateral issues remain open, the citizens continue to see the process as a process which is about harmonization with EU laws and standards. However, for now, the process for North Macedonia is not only reduced to reforms, but also to political issues, and in terms of whether to act on these issues, the majority of the citizens would rather resort to inaction or completely stopping the process, instead of adopting the amendments about the Bulgarian minority. Despite the turbulent road to it, the Union continues to be perceived as the largest donor, economic partner and ally of the country.

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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