

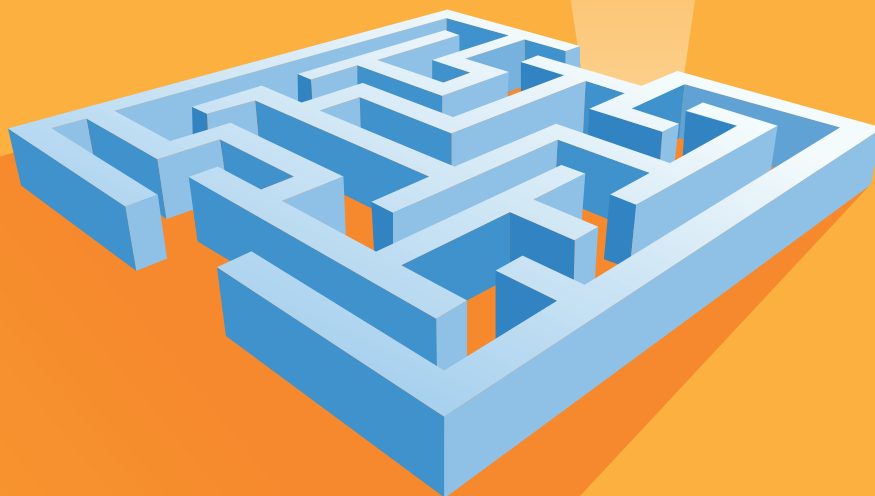
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Analysis of public opinion on North Macedonia's accession to the European Union (2014-2024)

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Summary of results

- 62% of the population supports North Macedonia's membership aspirations
- This puts a stop to a four-year decline in the support for EU integration.
- The Eurosceptic population remains very low at 11%.
- The undecided and apathetic respondents comprise a quarter of the population
- There is a significant disparity in support for EU membership between the two biggest ethnic groups in North Macedonia, the ethnic Macedonians and ethnic Albanians
- 56% of the ethnic Macedonian respondents support North Macedonia's EU membership aspirations
- 82% of the ethnic Albanian respondents support North Macedonia's EU membership aspirations
- Educational achievement is the most stable determinant of support for EU membership
- The youngest and the oldest segments of the population are the least enthusiastic about the idea of EU membership
- A third of the young population would not vote at a hypothetical referendum for North Macedonia's EU membership
- EU membership remains an important sentiment for almost 70% of the population
- Slightly more than a third of the population is placing high importance on EU accession
- The share of individuals for whom EU membership carries little or no importance constitutes a third of the population
- The ethnic Macedonians in general are more pessimistic and critical of the accession process when compared to the ethnic Albanians.

- In 2024, for the first time, less than half of the population has detected at least some progress in the EU integration process
- More than a third of the respondents are of the opinion that there has been no progress at all in the accession process
- 43% of the population think that the obstructions from the neighbouring countries are the biggest impediment to North Macedonia's EU accession progress
- External factors, rather than domestic issues, are viewed as the main reasons for the slowdown in the country's EU accession process
- The Macedonian public is developing more realistic expectations regarding the timeline for North Macedonia's EU membership
- Slightly less than a third of the population thinks that EU membership is obtainable in the next decade, while an additional 17% extend this expectation to the next 20 years.
- The number of pessimistic respondents that don't believe that the country will ever become an EU member is still relatively high
- Economic expectations continue to be the main determinants for the support of EU membership
- Majority of respondents that support North Macedonia's aspiration of EU membership base their preference on the anticipation of future material gains from the European integration process
- More than a third of the respondents that support North Macedonia's EU membership aspirations base their opinion on the expectation that EU membership will improve the standard of living in the country
- Nearly 60% of pro-membership respondents are motivated by material expectations
- Almost a third of the population believes that economic development will be the primary beneficiary of successful accession into the EU

- While economic benefits are often the primary driver, non-material advantages such as democratic reforms, stability, and cultural integration are also increasingly recognized as key positive outcomes of EU membership for North Macedonia
- 60% of the population does not believe that the benefits from EU accession will be sufficient to prevent the young population from leaving the country
- Identity and value-based concerns have become central to the formation of Eurosceptic sentiments among the Macedonian public
- A large proportion of the Eurosceptic respondents base their opinion on perceptions of cultural threats and other identity-based determinants
- The support for EU membership among SDSM supporters fully reflects the cues of the party leadership, and is 96%
- There is a notable change of attitudes among VMRO-DPMNE sympathizers
- A majority of 55% of VMRO-DPMNE sympathizers support the idea of EU membership, which is a rise of 12% when compared to 2023
- A significant proportion of VMRO-DPMNE supporters are either against EU membership, or are in the camp of the undecided or apathetic respondents

Introduction

The support for North Macedonia's European Union (EU) membership and its process of accession has been a subject of numerous public opinion surveys. However, most of these surveys have been conducted on an ad hoc basis and they have rarely been framed in a longitudinal and consistent methodological framework. There is an obvious lack of unified data bases that would offer repetitive public opinion research which would measure public attitudes through a generalized and coherent methodological framework across multi-year time periods. With a view to filling this gap, the Institute for Democracy "Societas Civilis" - Skopje and the Konrad Adenauer Foundation in 2014 initiated the establishment of a longitudinal database about the public support for the EU accession process and North Macedonia's EU membership which would be effectuated through annual public opinion surveys based on a coherent methodology and measurement of identical questions. This database focuses on two dimensions of public opinion on the Macedonian EU accession process which are addressed in every annual survey, and whose measurement is obtained by utilization of identical batteries of survey questions. The first dimension seeks to determine the general trends of public support for North Macedonia's EU membership. The second goal is to establish the determinants of such support through a long-term impact analysis of three factors: rationalist-utilitarian, identity-based and cues from political elites and political parties. Such accumulation of comparable data opens the path for establishment of more serious longitudinal analyses of the support for North Macedonia's EU membership. Furthermore, as an addition to this unified design, every annual research further inspects public opinion on the EU integration process, by examining current topics, specific for concrete time periods, and presented in a separate publication.

The starting point of this approach are the findings of the monograph "Public opinion and Macedonia's accession to the European Union (2004-2014)"¹, published in 2014, which at the same time includes the data from the public opinion survey conducted in 2014, and represents a methodological reference point for all subsequent research outputs. This comprehensive study accomplished two objectives. First, it determined general trends of support for North Macedonia's

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

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.

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 2024 is a continuation of the research done in 2014, 2016, 2017, 2018, 2019, 2020, 2022 and 2023. 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 public opinion survey research conducted in the period October-December 2024 on a sample of 1056 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 ten years. In addition, the questionnaire for this and last years' research has been slightly updated with the introduction of one completely new question and amendments of some of the existing variables. Thus, in line with the previously established analytical model, this study focuses on analysing general trends and basic determinants of support for North Macedonia's membership in the European Union in the period 2014-2024.

General trends

The declining public support for EU membership in North Macedonia over the past decade can be largely attributed to the low credibility in the country's EU accession prospects which was initially triggered by the prolonged Greek blockade of the process which was based on the longstanding name dispute between the two states. While the resolution of this issue in 2019, following the ratification of the Prespa Agreement, was expected to reinvigorate the accession momentum, this enthusiasm proved to be short-lived. By the end of 2020, the start of accession negotiations was once again obstructed by a new blockade tied to a new bilateral dispute with Bulgaria that involves issues of national identity, history, and language.

The deadlock was temporarily removed with the Macedonian government's approval of the EU backed 'French proposal' which (among other conditions) imposed the recognition of a Bulgarian minority in the Macedonian Constitution. The decision, though controversial, allowed the accession process to move forward by incorporating these conditions in the EU negotiating framework and enabling the initiation of the screening process and the start of formal negotiations with the EU.

However, the accession negotiations couldn't progress to the next phase as the constitutional changes could not be materialized due to a lack of cross-party consensus in the Parliament to achieve the necessary threshold. In May 2024, there was a change of government after the overwhelming victory of the opposition led by VMRO-DPMNE who soon after the elections formed a government coalition with VLEN, a newly established coalition of parties representing the ethnic Albanians in the country. While the new government retained EU accession as a top priority, it refused to back the constitutional amendments as envisioned in the EU negotiating framework unless the EU provides firm assurances that the process will not be hindered by additional conditions or obstacles from Bulgaria.

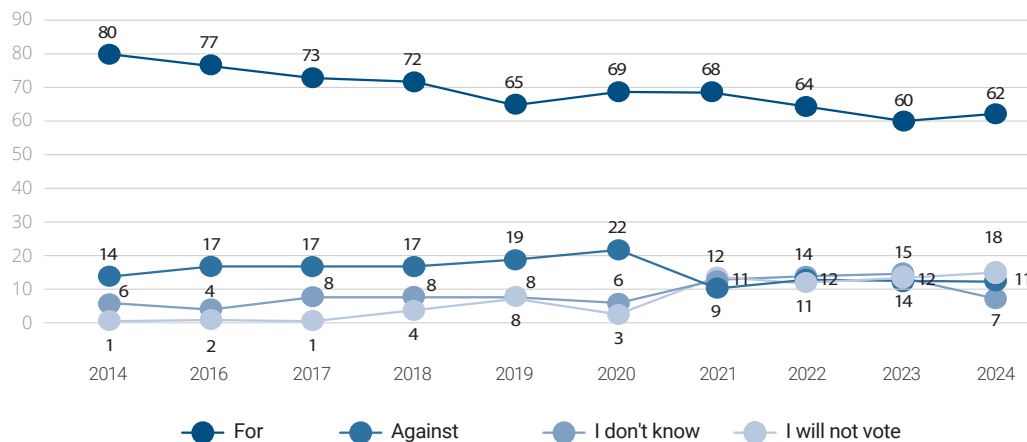
On the other hand, in May 2024, the EU Council officially adopted the Growth Plan for the Western Balkans which envisages significant financial assistance for the region. In October, the European Commission approved the Reform Agenda for North Macedonia which paved the way for the initial payments under the Growth Plan.

These ambivalent signals did not have a significant effect on the general support for EU membership in 2024. 62% of the population continues to endorse North Macedonia's membership aspirations which is (though statistically not very significant) a rise of two percentage points in comparison to the previous year (graph 1). This slight uptick puts a stop to a four-year decline in support for EU integration. At the same time, the proportion of Eurosceptic population remains almost the same at 11%. The cohort of undecided and apathetic respondents comprises a quarter of the population, reflecting a 4% decrease compared to the previous year.

The well-established trend of significant disparity in support for EU membership between the two biggest ethnic groups in North Macedonia, the ethnic Macedonians and ethnic Albanians is confirmed with the results of the 2024 survey. 56% of the ethnic Macedonian respondents support North Macedonia's EU membership aspirations, 3 % more than in 2023. On the other hand, support for EU membership among the ethnic Albanians in North Macedonia has increased by 4%, reaching 82% of the population. A similar gap is evident in the distribution of Eurosceptic attitudes, as 15% of the ethnic Macedonians are openly against EU membership, compared to only 3% of ethnic Albanians. The cumulative number of undecided and apathetic respondents among the ethnic Macedonians remains relatively high (28%).

Similar to previous years, educational achievement comes up as the most stable positive determinant of support for EU membership. The youngest and the oldest segments of the population also remain the least enthusiastic about the idea of EU membership. Less than 50% of the respondents aged 65 and older are supportive of EU membership, while roughly 60% of the population between 18 and 24 years shares the same sentiment. Although support within the latter demographic group has increased by 7 % compared to the previous year, the level of support is lower than the cohort between 25 and 54 years of age, which is significantly more responsive to the idea of EU membership (at approximately 70%). In addition, a third of the young population would not vote at a hypothetical referendum for North Macedonia's EU membership.

Graph 1 . ³ If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



The notion of EU membership remains an important sentiment for almost 70% of the population (table 1). However, the distribution of attitudes in the past two years has become more nuanced, as the intensity of importance has decreased by almost 20%, with only 35% of the population now placing high importance on EU membership, down from 54% in 2022. Meanwhile, the percentage of respondents that attach some importance to the membership perspective has risen to 33% in the same period. The share of individuals for whom EU membership carries little or no importance at all has also grown, now comprising a third of the population. The inter-ethnic gap hypothesis is also confirmed by the results of the 2024 survey. 55% of the ethnic Albanian respondents attach high importance to EU membership which is almost 30% more in comparison to their ethnic Macedonian counterparts. Conversely, a significant proportion (35%) of the ethnic Macedonian respondents do not perceive EU accession as important. Educational achievement also emerges as a key predictor for this sentiment, as the share of respondents attaching high importance to EU membership is much higher among the cohort of highly educated individuals.

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

Table 1

How personally important is it for you for North Macedonia to become a member of the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %
Highly important	48	48	54	56	36	36	51	54	39	35
Somewhat important	36	29	20	24	35	34	26	21	34	33
Somewhat unimportant	5	5	6	5	10	13	5	7	6	14
Not important at all	10	16	18	14	18	16	16	16	19	15
I do not know	1	1	1,5	1	1	1	2	2	1	2
No answer / refuses to answer	0	0	0	0	0	0	0	0	0	1

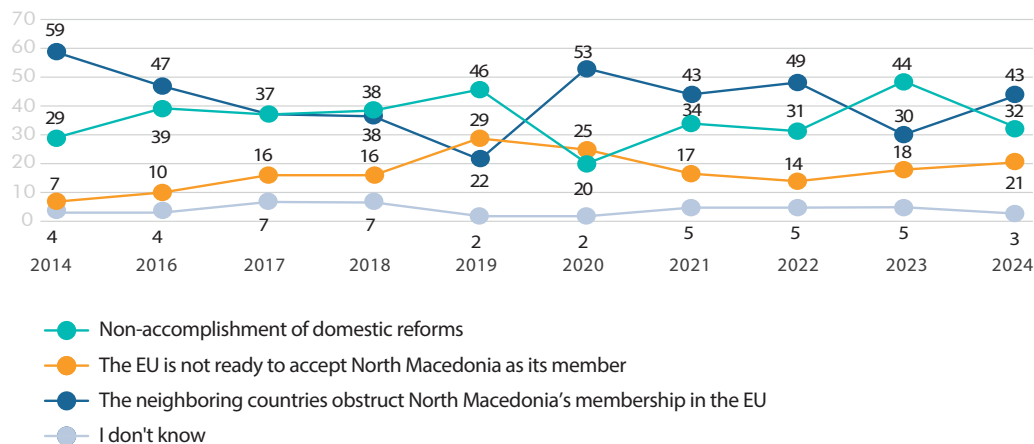
The recent trends in the perception of the Macedonian population on the progress in the EU accession in the past year have become more consistent with the credibility of the process. The cumulative percent of respondents that detect progress in the accession process has been incrementally going down. In 2024, for the first time, less than half of the population (47%) has detected at least some progress in the EU integration process (table 2). A quarter of the population believes that the country has had minimal progress in the past year. On the other end of the spectrum, 34% of the respondents are of the opinion that there has been no progress at all in the accession process in 2024, while an additional 11% believe that the country has actually regressed in its EU accession path. As expected, the inter-ethnic gap is evident in regard to this question as well, though to a lesser degree compared to previous years. A slight majority of the ethnic Macedonians have a pessimistic outlook on the level of progress in the EU integration of North Macedonia in the course of 2024. Almost 40% within this demographic group feel that there was no progress at all, while an additional 11% think that the process has regressed. In contrast, almost 40% of the ethnic Albanians have detected minimal progress in the accession process in the past year. 23% of respondents believe that there was no progress at all.

Table 2

Regarding this year (2024), how much has North Macedonia progressed in the EU integration process?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %
It has progressed a lot	14	11	13	13	11	10	11	10	6	4
It has somewhat progressed	33	28	31	25	27	38	27	23	22	18
It has progressed a little	20	20	20	28	23	27	21	20	24	25
There was no progress at all	26	30	27	30	33	20	33	30	35	34
It has regressed	5	7	2	2	5	5	4	13	10	11
I do not know	2	3	7	2	1	1	3	3	2	8
No answer / refuses to answer	0	1	1	1	0	0	1	1	0	1

Over the past three years, there has been a notable variation in how the population perceives the main obstacles to North Macedonia’s EU membership prospects. The ongoing blockade of the accession process, stemming from a bilateral dispute with a neighboring EU member state, has again gained traction in the past year. Thus, 43% of the population think that the obstructions from the neighboring countries are the biggest impediment to North Macedonia’s EU accession progress (graph 2). This figure constitutes a rise of 13% compared to 2023. On the other hand, there is a drastic shift in the distribution of attitudes that pinpoint lack of domestic reforms as the most significant barrier to EU membership. Roughly 20% of the population shares this sentiment, more than 20% less than in the previous year. Finally, there is a steady increase of respondents for whom EU’s unwillingness to accept North Macedonia as a member is the biggest obstacle to the country’s aspirations for EU membership. This shift in public perception highlights a clear trend toward viewing external factors, rather than domestic issues, as the main reasons for the slowdown in the country’s EU accession process.

Graph 2. ⁴ In your opinion, what is the main reason why North Macedonia is still not a member of the EU?



Recent trends suggest that the Macedonian public is developing more realistic expectations regarding the timeline for North Macedonia's EU membership (table3). Less than 20% of the respondents believe that North Macedonia will join the EU within the next three to five years. Slightly less than a third of the population thinks that EU membership is obtainable in the next decade, while an additional 17% extend this expectation to the next 20 years. The number of pessimistic respondents that don't believe that the country will ever become an EU member is still relatively high at 26%. The ethnic Macedonians remain more pessimistic when compared to the ethnic Albanians. While the majority of ethnic Albanians believe that the country will become an EU member state in the next 10 years, a third of the ethnic Macedonians are convinced that that EU membership is unattainable. However, this sentiment is not as emphasized as in the previous year (2023) as the percentage of pessimistic respondents among the ethnic Macedonians has decreased by 10% in 2024.

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 3%

Table 3

When do you think North Macedonia will become a member of the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %
In the next 3 years	14	18	27	23	14	20	18	11	8	5
In the next 5 years	18	22	22	25	20	28	16	16	13	12
In the next 10 years	21	18	12	17	21	25	18	21	31	28
In the next 20 years	12	7	7	14	16	9	11	15	11	17
Never	23	25	20	17	24	15	29	32	30	26
I do not know / refuses to answer	11	10	11	5	4	3	8	6	7	11

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.

This trend continues in 2024. 35% of the respondents that support North Macedonia's EU membership aspirations, base their opinion on the expectation that EU membership will improve the standard of living in the country (table 4). An additional 13% support EU integration with the expectation that it will help reduce unemployment. Finally, 10% of the support for EU membership is driven by the anticipation of increased opportunities for mobility of workers and easier access to jobs abroad. In total, nearly 60% of pro-membership respondents are motivated by material expectations. However, as can be seen in table 4, the utilitarian dimension of support for EU membership has become less prominent in the past 6 years. Non-material factors such as expectations of improved democratic performance, more stability and security and a sense of belonging to "the European family of countries" have also gained relevancy. This is particularly the case with the expectations of improved stability which is a sentiment shared by almost 20% of EU membership supporters. In summary, while economic benefits are often the primary driver, non-material advantages such as democratic reforms, stability, and cultural integration are also increasingly recognized as key positive outcomes of EU membership for North Macedonia

Table 4

What is your reason for deciding to vote for membership in the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %
Improvement of the standard of living	29	46	51	36	22	21	23	23	25	35
Reduction of unemployment	26	17	23	22	18	19	16	18	14	13
Improvement of democracy	10	5	7	9	13	13	14	12	13	10
Mobility of workers/ easier access to jobs abroad	3	10	5	6	15	16	14	15	15	10
A sense of belonging to “the European family of countries”	2	5	2	4	13	13	12	11	14	13
Improved security and stability of the country	27	16	12	23	19	19	20	20	19	18
I do not know / refuses to answer	2	1	1	1	0	0	0	1	0	0

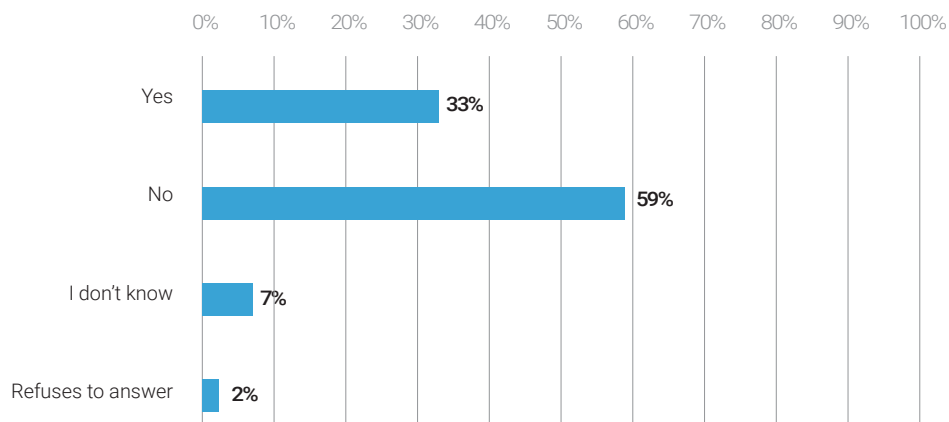
The rationalist-utilitarian argument is confirmed also by public perceptions on three aspects of society that would benefit the most from North Macedonia’s EU membership (table 5). Almost a third of the population believes that economic development will be the primary beneficiary of successful accession into the EU, reflecting a 9% increase from the previous year. Additional 18% expect improvement of the quality of life as a whole, while 13% anticipate that unemployment will be the area that is most positively affected by EU membership. In contrast, non-material expectations are less frequent, although 16% of respondents foresee increased stability as the key benefit of EU integration. However, only 9% expect positive gains in the area of human rights and freedoms.

Table 5

Which area will be most positively affected by North Macedonia's membership in the EU?	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %
Economic development	23	25	25	20	18	19	19	21	18	27
Stability	13	15	15	13	14	12	13	17	12	16
Reduction of unemployment	23	18	21	19	20	21	15	17	14	13
Human rights and freedoms	12	9	12	14	12	11	12	12	12	9
Improvement of infrastructure	6	5	5	9	11	13	11	9	13	8
Quality of life as a whole	16	18	11	13	17	16	15	18	19	18
Strengthening of national identity	3	4	4	7	3	5	9	6	7	2
Other	1	3	2	1	2	2	3	0	2	0
I do not know	3	3	6	3	3	1	2	0	4	5

The final part of this section focuses on the public perceptions on the correlation between EU integration and the problem of migration of the young population and brain drain in North Macedonia. A significant majority (60%) of the population does not believe that the benefits from EU accession will be sufficient to prevent the young population from leaving the country (graph 4). On the other hand, slightly more than a third of the population are more optimistic and expect that EU membership will help reduce these migration outflow trends. From a demographic standpoint, once again there is a significant disparity in opinion between the ethnic Macedonians and the ethnic Albanians. While almost half of the ethnic Albanian respondents believe that EU membership will reduce the migration of the young population and the brain-drain problem, close to 70% of the ethnic Macedonians are convinced that EU accession will not have any effect on these developments.

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



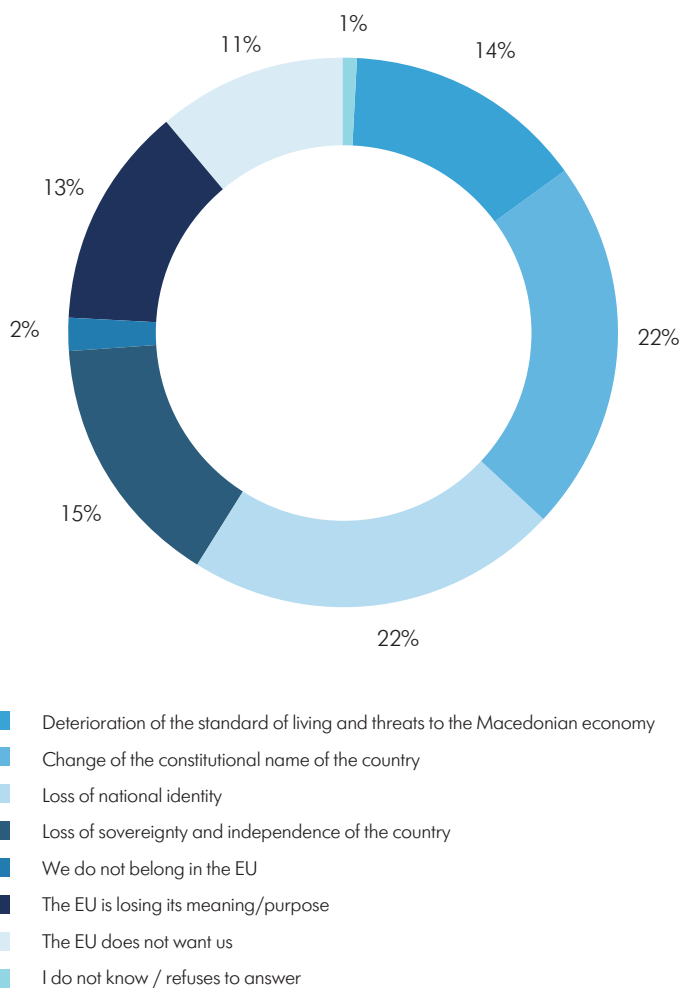
Identity and value-based factors

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As utilitarian factors have long been recognized as the main drivers of support for EU membership in North Macedonia, at the same time there has been a growing prominence of identity and value-based concerns as key factors shaping Eurosceptic attitudes. Over time, perceptions of cultural threats linked to the supranational nature of European integration, as well as fears of sovereignty erosion resulting from the accession process, have increasingly emerged as significant predictors of opposition to EU membership. These identity and value-based concerns are now central to the formation of Eurosceptic sentiment among the Macedonian public.

Likewise, the results of the 2024 survey show that a large proportion of the Eurosceptic respondents base their opinion on perceptions of cultural threats and other identity-based determinants. Thus, 22% of Eurosceptic respondents oppose the idea of EU membership due to fears of a negative impact on national identity. An equal percentage (22%) of respondents are against EU membership as a form of protest over the changing of the constitutional name of the country which came as a consequence of the EU-backed Prespa agreement. Additional 15% don't support EU membership because it is perceived as a threat to national sovereignty, while 13% believe that there is no point in supporting EU membership since the EU has lost its meaning and purpose. Only 14% of the Eurosceptic population form their opinion on EU membership based on material factors, i.e. the assumption that it will have a negative effect on the standard of living in the country and that it will undermine the Macedonian economy.

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



In the past two years, there is an almost identical distribution of attitudes in terms of respondent self-perceptions of their identity. An overwhelming majority of the population (73%) perceives itself through the lens of exclusive (ethnic) identity. 21% of the population attach a second, European identity next to their ethnic/national sense of belonging. The number of citizens that emphasize their European identity over their ethnic/national identity is miniscule.

Table 6

Above all, do you feel as	2014 %	2016 %	2017 %	2018 %	2019 %	2020 %	2021 %	2022 %	2023 %	2024 %
Only Macedonian/ Albanian/other	69	70	77	69	67	78	60	77	71	73
Macedonian/ Albanian/other and European	20	20	15	20	24	14	25	13	20	21
European and Macedonian/ Albanian/other	6	7	3	4	7	7	10	3	3	4
Only European	3	3	3	5	1	1	2	3	4	1
I do not know	2	1	2	1	1	0	3	3	2	1

The results from the 2024 survey correspond well with the longitudinal trends (the 2023 survey being the exception) that support the argument that there is no significant correlation between declarations of exclusive ethno-national identity and Eurosceptic energy, as the distribution of attitudes among this demographic is similar to the general distribution shown in graph 1. In line with expectations, the group of respondents that declare dual (ethnic and European) identity is overwhelmingly supportive of North Macedonia's EU membership aspirations.

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.

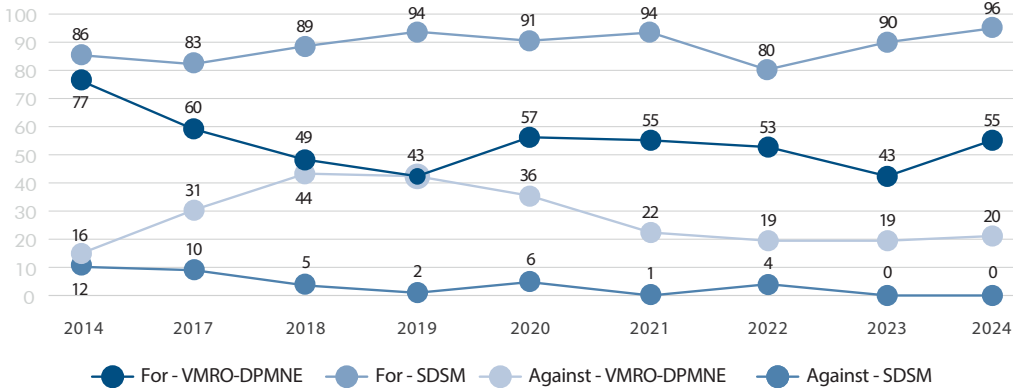
Throughout the period of time that is covered in this analysis, virtually all relevant political parties in North Macedonia have officially supported the country's aspirations for European integration and EU membership. However, despite the general party consensus, there have been significant differences 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 opposition party, SDSM, has been continuously placing European integration as the highest priority on its political agenda. The party supports compliance with the conditions set by the negotiation framework, including the constitutional changes, as a prerequisite for continuation of the accession negotiations with the EU. On the other hand, VMRO-DPMNE in 2024 has become the leading party in the coalition that has formed the new government in the aftermath of the general elections in May. VMRO-DPMNE, now in the capacity of a governing party, continued to strongly support the EU accession process. However, its leadership has been adamant in its position not to back the constitutional changes without assurances from the EU that the accession process will not be hindered by further conditions or blockages from Bulgaria or other instances of bilateral disputes.

Having this in mind, it can be assumed that by picking up cues from their respective party leadership, the respondents who are SDSM sympathizers would be more supportive of the accession process when compared to the supporters of VMRO-DPMNE due to the reluctance of the party to comply with some of the political conditions imposed by the EU. This argument is somewhat confirmed by the results from the 2024 survey (graph 6). The percentage of SDSM sympathizers that support North Macedonia's aspirations for EU membership has been exponentially growing in the past three

years to reach an all-time high of 96%. On the other hand, there is a notable change of attitudes among VMRO-DPMNE sympathizers in comparison to 2023. In 2024, a majority of 55% of VMRO-DPMNE sympathizers support the idea of EU membership, which is a rise of 12% when compared to 2023. This is probably a reflection of the party's shift from opposition to governing ranks and a possible easing of the intensity of the bilateral dispute with Bulgaria. However, a significant proportion of VMRO-DPMNE supporters are either against EU membership (20%) or are in the camp of the undecided (8%) or apathetic (17%) respondents.

Graph 6 .⁵ If next week there is a referendum for membership of the Republic of North Macedonia in the EU, how would you vote?



Another indicator that reflects the influence of party cues on attitude formation is the distribution of results regarding the question on the achieved progress in the EU accession over the past year. The new ruling vs opposition party dynamics after the elections in May 2024 have completely reversed the views of VMRO-DPMNE and SDSM supporters on this particular issue. For example, in 2023, a staggering 93% of the SDSM supporters believed that there had been a significant progress in the accession process. In 2024, roughly 60% within the same demographic think that the country has not progressed or regressed in the accession process, which most likely is a reflection of the criticism of the party leadership of how the accession process has been managed by the new government. In contrast, the elections and the formation of the new government has had a reverse effect on the opinion of VMRO-DPMNE sympathizers. While in 2023, 70% of VMRO-DPMNE supporters thought that North Macedonia has not progressed at all or that it has regressed in the EU integration process, in 2024, roughly 60% within the same category of respondents is of the opinion that there has been some progress in the past year.

⁵ The analysis takes into consideration only the data for the two largest parties in the country VMRO-DPMNE and SDSM. The data for the other parties has been omitted due to the small sample size. The values that refer to the answers *I do not know* and *I will not vote* have not been included in the graph.

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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