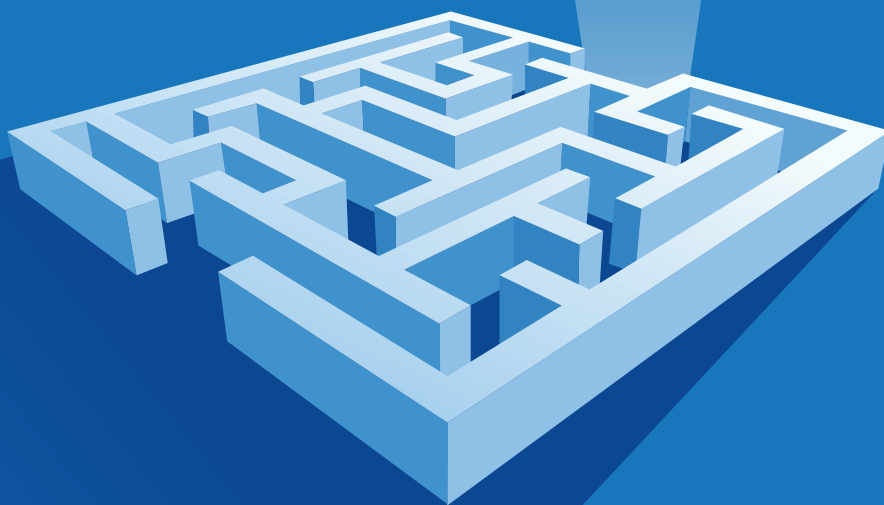


Public Opinion Analysis Paper No. 2/2025

EU Integration in 2024: From European dream to Macedonian reality

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*The views expressed in this document do not necessarily reflect the views
of the Konrad Adenauer Foundation and the Institute for Democracy
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Key findings

- The EU remains the country's most desired economic partner (33%) and donor (40%), followed by the US (22% in terms of economic partner and 17% in terms of donor).
- Citizens remain divided in their views on the next steps in the European integration process. Only 20% of citizens believe that constitutional amendments should be the necessary next step, and 21% of citizens believe that the process should be stopped.
- There is a decline in optimism about the European Union's readiness to accept the Western Balkan countries as members by 2030 (from 50% in 2023 to 33% in 2024).
- Albanian respondents are more oriented towards the West (62%), while Macedonian respondents are more divided (33% for the West, 46% neutral).
- The majority of respondents see judicial reforms (34%) as a priority in EU accession.
- Citizens see European integration as the most important foreign policy priority (35%), followed by regional cooperation (26%).
- The US continues to be seen as the most influential factor in the country (41%), but its influence is declining compared to 2023 (60%). At the same time, the EU's influence is increasing significantly (from 19% in 2023 to 37% in 2024).
- The EU remains the most important ally (39%), followed by the US (19%). Young people (18-24 years old) this year show openness towards China (19%), while respondents over 65 (65+) express support for Russia (15%).

Introduction

Since 2016, the Institute for Democracy (IDSCS) and the Konrad Adenauer Foundation (KAS) have been conducting a national survey with a representative sample of issues relevant to the integration process of North Macedonia into the European Union (EU). The survey includes questions that are repeated every year in order to identify questions and trends over the years that relate to current political developments. This edition of the survey examines public opinion on current issues related to the European integration process, including the commitments that have been undertaken and are necessary to continue the negotiation process with the EU, citizens' views on economic priorities and global geopolitical strategic actors. The data allow us to make a comparative analysis of the trends present in public opinion, and at the same time to understand the general attitude about the most current issues in a particular year. For a purpose of more detailed analysis, each question is monitored, among other parameters, from the perspective of the political orientation and ethnicity of the respondents. The findings of the analysis are summarized in three categories: 1) *EU integration and reform processes* 2) *Economic priorities and partnerships;* and 3) *Global geopolitics and strategic partners.*

The survey was conducted through fieldwork carried out between October 25 and December 4, 2024, using a sample of 1056 respondents prepared by the State Statistical Office based on addresses.

Overview of political developments in 2024

The political developments in North Macedonia over the past year have been crucial regarding the direction of the country in the years to come. Presidential and parliamentary elections were held in April and May, leading to a change of government. The selection of the presidential candidate supported by VMRO-DPMNE was followed by a reconfiguration of the Parliamentary majority and the formation of a new government. The coalition "For a European Macedonia" coalition, led by the Social Democratic Union of Macedonia (SDSM) and the "European Front" of the Democratic Union of Albanians (DUI), lost its government mandate. The coalition "Your Macedonia", led by VMRO-DPMNE, with support from the Albanian coalition "Vredi" and the "ZNAM" movement, came into power. This change marked the end of the SDSM government, as well as the two-decade dominant presence of DUI as a main representative of the Albanian electorate.¹

The new government presented its policies through the "Platform 1198"², which is a set of 1198 projects organized into six main postulates: improving living standard, combating corruption, strengthening the rule of law, building a functional system for citizens, unitary patriotism, and protecting rights and freedoms.

The government's focus was on economic development and reforming of the system in order to improve the living standard. In the first six months, the government announced foreign direct investments worth 838.2 million euros³ and a loan from Hungary of one billion euros⁴.

The first law to be put before the MPs for consideration in the new composition of the Assembly was the Law on Reorganization of the Government⁵. As part of the reorganization, the horizontal concept of the Secretariat for European Affairs was abandoned, and was reorganized into a Ministry for European Affairs. The new government also showed a different approach to the condition for continuing of the negotiations, i.e. lobbied for so-called constitutional amendments with delayed effect.⁶ For now, these lobbying efforts have not yet produced results, and thus the obligation to include the Bulgarian minority in the Constitution remains to be fulfilled.

¹ State Election Commission: Announcement - [Conclusion on the completion of the elections for members of the Parliament of the Republic of Macedonia held on 08.05.2024](https://www.sec.mk/zakluchok-za-zavrshuvanje-na-izborite/) <https://www.sec.mk/zakluchok-za-zavrshuvanje-na-izborite/>

² VMRO DPMNE website - VMRO-DPMNE's Election "Platform 1198" <https://shorturl.at/3zhjo>

³ National Bank of the Republic of North Macedonia (NBRM) - Direct Investment tendencies https://www.nbrm.mk/direktni_investicij_dvizenja.nspix

⁴ Announcement of the Government of the Republic of North Macedonia <https://vlada.mk/node/37795>

⁵ Agenda of the plenary session of the Parliament of the Republic of North Macedonia <https://www.sobranie.mk/detali-na-sednica.nspix?sittingId=72c0b0d8-d42c-41e6-a974-5fb8e550e7cc>

As an incentive for reforms that are complementary to the European integration process, the European Commission approved the Reform Agenda within the framework of the Growth Plan for the Western Balkans.⁷ The first financial stimulus of 52.5 million euros is expected to arrive in early 2025⁸. In a regional context, North Macedonia has committed to fulfilling the responsibilities undertaken under regional initiatives, primarily the Berlin Process, which includes a new action plan for the Common Regional Market for the next four years⁹.

On a global level, the changes in the country's strategic partners – the European Union and the United States – have brought new challenges. The US has a new Republican administration, while the European Union has appointed a new Commissioner for enlargement, Marta Kos, with a new organizational structure that will focus solely on the enlargement policy.^{10 11}

In the following section, we explore citizens' views on several key annual events. First, we analyze the public perceptions about the economic priorities and the influencing factors in the country, followed by reflections on European integration and the reform processes it brings, and finally on geopolitical external influences.

⁶ MIA Press release <https://mia.mk/story/delayed-implementation-of-constitutional-changes-doesnt-require-changes-to-negotiating-framework-fm%C2%A0>

⁷ Ministry of European Affairs: Reform Agenda of North Macedonia <https://mep.gov.mk/en/post/?id=15800>

⁸ Minutes of the Public Debate of the European Affairs Committee of the Parliament of the Republic of North Macedonia <https://www.sobranie.mk/detali-na-komisiska-sednica.nspx?sittingId=c2f3d46f-a481-4a9e-8c88-f4b527bf55ad>

⁹ Conclusions from the 2024 Berlin Process Leaders' Meeting https://www.berlinprocess.de/uploads/documents/chairs-conclusions-2024_1728992421.pdf

¹⁰ European Parliament, Statement from the hearing of Marta Kos <https://www.europarl.europa.eu/news/en/press-room/20241029IPR25046/hearing-of-commissioner-designate-marta-kos>

¹¹ European Commission, Organization chart [Organisation chart - European Commission](https://ec.europa.eu/commission/organisation-chart)

Economic development in focus of the government

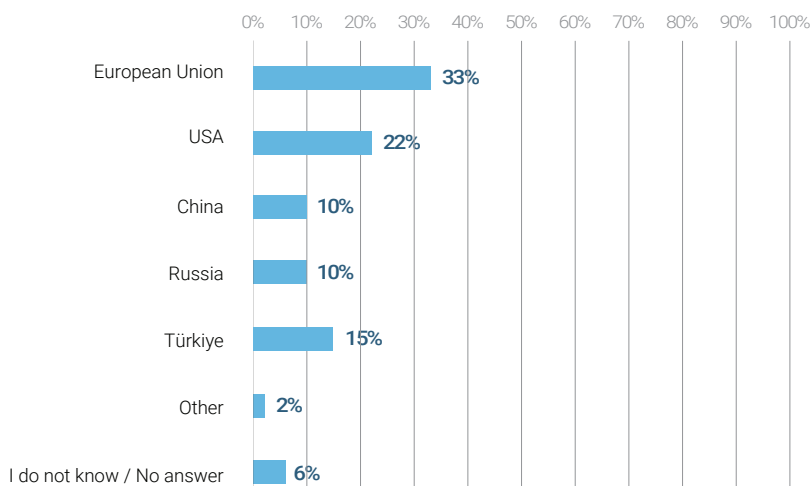
During the election campaign, economic development and improving the quality of life were frequently mentioned topics. After the formation of the government, the first step in this direction was the announcement (and implementation) of a loan from an EU member state – Hungary – as well as foreign direct investments, primarily in the energy sector.

Economic issues are of fundamental importance to citizens. Therefore, the research focuses on economic partnerships by asking questions that have been asked for 6 years historically, allowing for longitudinal monitoring.

Citizens have the greatest confidence in the European Union (33%) and the United States (22%) when it comes to economic cooperation. The EU is the dominant choice, which coincides with the country's European integration aspirations and trade dependence on member states, while the United States is the second most popular partner, indicating the strong transatlantic relationship and the importance of the American support for economic and political development. Both the EU and the United States are followed by Türkiye (15%), China (10%) and Russia (10%).

In fact, the trust shown by citizens does not differ from the real situation. In 2024, the EU accounted for 61% of total trade, and Germany traditionally stands out as the country's largest trading partner with a share of 23% of the total trade¹².

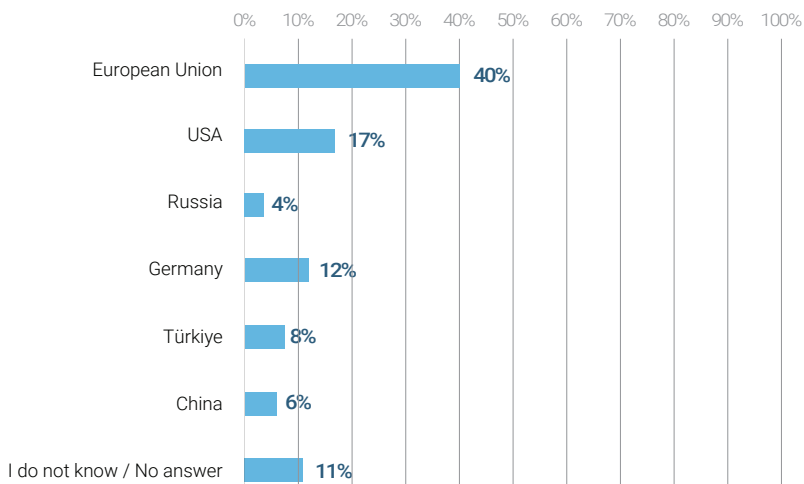
Who do you think should be the main economic partner of our country?



¹² State Statistical Office, Trade Exchange Announcement for 2024 <https://www.stat.gov.mk/PrikaziSooopstenie.aspx?rbtxt=78>

While the first question focuses on citizens' views on trade, the next question explores who is the largest donor. The responses show that the EU is again perceived as the largest donor by 40% of respondents, significantly higher than the US (17%) and Germany (12%). Interestingly, 11% of respondents do not know who the largest donor is, suggesting that a number of respondents may be under-informed about the development aid.

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

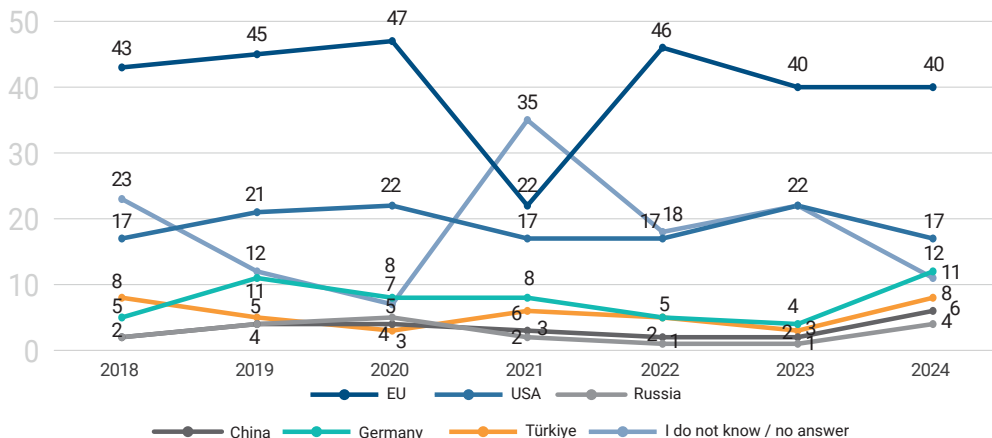


Over the years, the EU has maintained its lead over other donors. Over the past two years, 40% of respondents have highlighted the EU, while the US has traditionally remained in second place, with a perception that has fluctuated between 17% and 22% in recent years. Russia, China, Germany and Türkiye remain with significantly lower percentages.

The data monitoring over the years shows that there is a continuous perception about the largest donor, which is not subject to major fluctuations over the years. The latest data from the Organization for Economic Cooperation and Development for 2022 confirms these views. After all, the EU participated with 72 million dollars in development aid, compared to 17.5 million dollars from the United States, which indicates that citizens are well acquainted with and recognize the EU as an actor that contributes to the development of the country.¹³

¹³ Organization for Economic Cooperation and Development. Available at <https://stats.oecd.org>

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



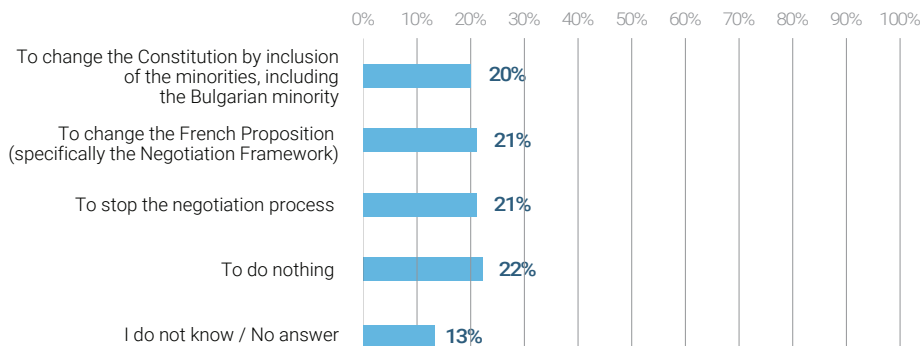
European integration and reform processes

In addition to the internal processes that were focused on the economy in the course of the last year, the foreign policy, specifically European integration, remains the most burning topic for Macedonian citizens. The debate about how much a political party is inclined towards the process has always been a starting point in the election campaigns. In 2024, promises about the integration process are also present in the party programs. Below, we explore the position of citizens on key issues about the process.

The question we have been monitoring this year and in the past year explores citizens' perceptions of what steps they believe should be taken. Hence, respondents are offered four answers starting from the real condition set in the negotiating framework, followed by the possibility of changing the negotiating framework, which is an almost unattainable and extremely difficult step to fulfill. The last two options represent the status quo and a withdrawal action.

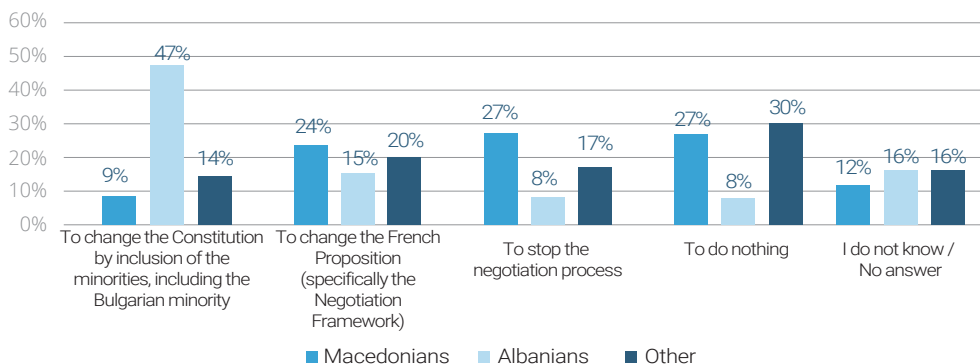
The results show that respondents are completely divided in their views on the changes needed for European integration. In numbers, 22% of respondents believe that nothing should change, while 21% demand a change in the negotiating framework, and the same percentage believe that the negotiations should be stopped. Only 20% of respondents support constitutional amendments in order to include new minorities as the next step on the path to the EU.

What changes do you think need to be made on the path towards the European Union?



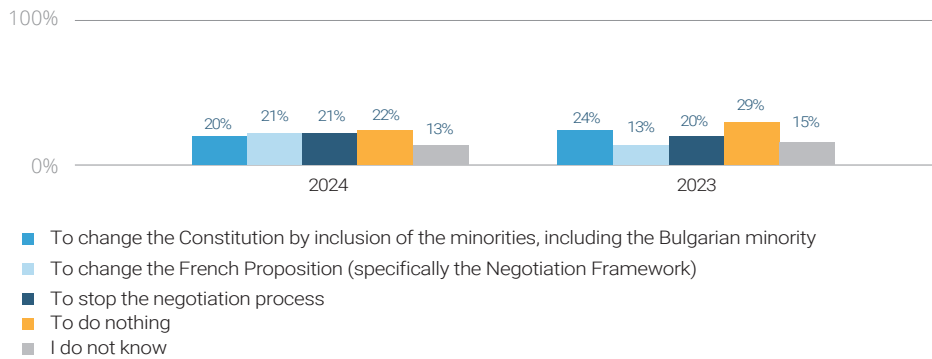
There are ethnic differences in how the next steps for European integration are perceived. The majority of Macedonian respondents have a negative perception of the next steps, specifically 27% believe that nothing should be done and an equal percentage of 27% of respondents believe that the negotiation process should be stopped, which indicates a stronger Euroscepticism in this group. In contrast, almost a majority of Albanian respondents (47%) support the constitutional change to include new minorities, including Bulgarian.

What changes do you think need to be made on the path towards the European Union? (ethnic background)



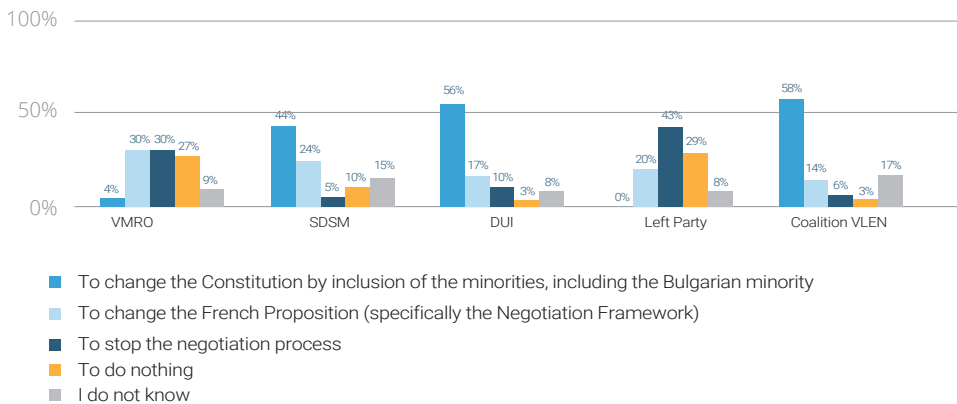
Compared to 2023, when this question was asked for the first time, there are no drastic differences in citizens' perceptions. The percentage of respondents who believe that the status quo should be maintained has decreased from 29% to 22%, and a small percentage of citizens have changed their minds from accepting changes to the Constitution to changes in the negotiating framework.

What changes do you think need to be made on the path towards the European Union? (historical overview)



In terms of political affiliation, one can notice differences in the views of the respondents. Supporters of SDSM (44%), DUI (56%) and the VLEN Coalition (58%) are the most supportive of constitutional amendments, while VMRO-DPMNE voters are divided – 30% demand an amendment to the French proposal, but the same number believe that the negotiations should be stopped. The most vocal desire to cancel the negotiation process exists among the respondents of Levica (Left), of whom 43% are in favor of stopping the process completely.

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

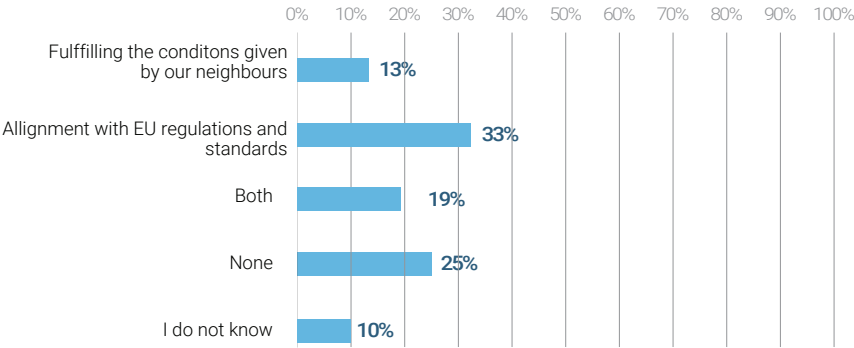


After identifying citizens' perceptions of the next steps in the process, we explore their views on the process itself, which has undoubtedly been given a great political connotation in recent years. It is important to understand how citizens view this process, and this issue is monitored during 2023 and 2024.

In 2024, every third respondent or 33% sees the process as harmonization with EU legislation and standards. This shows us that citizens identify the importance of institutional and legal reform as a fundamental component of European integration. This percentage remains the same in 2023 (33%).

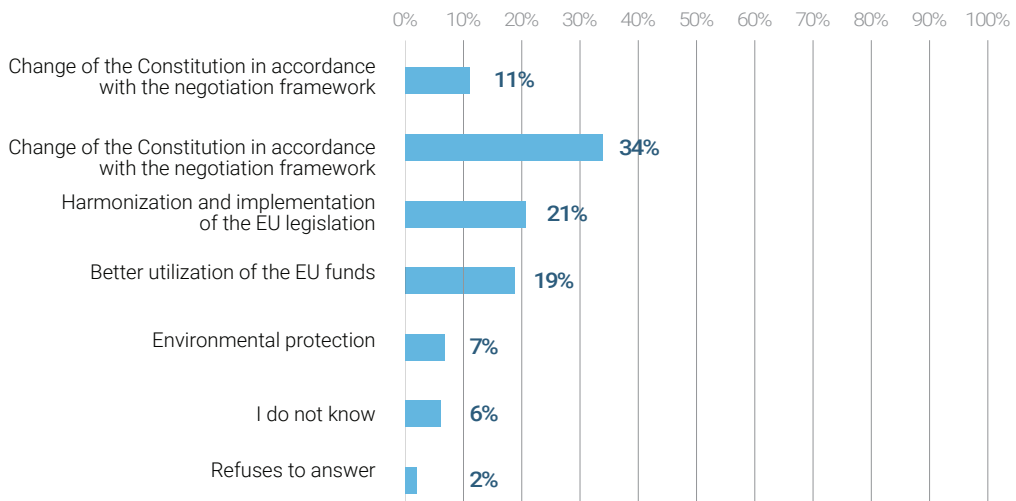
However, a quarter of respondents (25%) do not see the process as either satisfying the demands of our neighbors or as harmonizing with the legislation, and 19% of respondents answered that the process contains both of the offered answers. The smallest number of respondents (13%) see the process as satisfying the demands of our neighbors, although it is a condition that is most mentioned in the public.

How do you perceive the EU negotiations process?



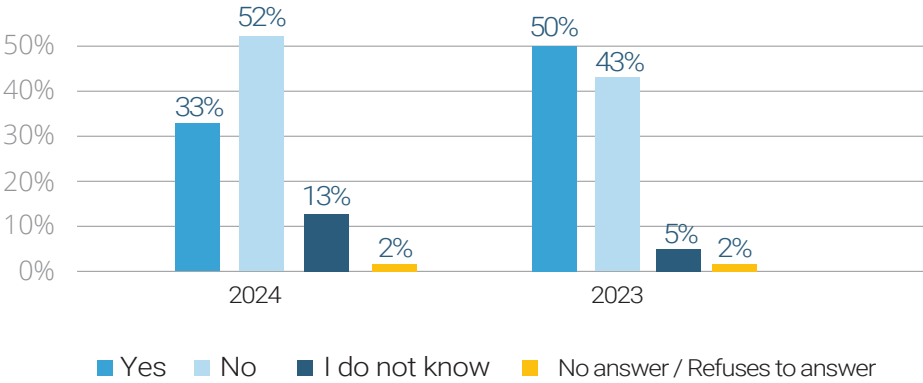
The next question regarding European integration is how citizens view the priorities in the enlargement policy. The majority of respondents see reforms in the judiciary (34%) as a priority in EU accession, which indicates awareness of the role of the judiciary in good governance and democracy. This is followed by harmonization and implementation of EU legislation (21%) and the use of EU funds (19%), which highlights priorities such as legislative alignment and financial absorption.

Which of the following areas should be a priority in the government's EU accession policy?



The last question relevant to the negotiation process is a survey of the perception of the EU's readiness to accept the Western Balkan countries as members. We have been monitoring this issue for two years now and this year there has been a significant decline in optimism among citizens compared to 2023 when it comes to the acceptance of the Western Balkan countries to the European Union by 2030. In 2024, only 33% of respondents believe that the European Union will be ready to accept the Western Balkan countries by 2030, which is a significant drop compared to 50% in 2023. The largest percentage of respondents (52%) in 2024 do not believe that the EU will be ready to accept the Western Balkan countries by 2030, which is a significant increase compared to 43% in 2023. This trend indicates the growing disappointment among citizens regarding the speed of integration and the challenges faced by the countries of the region.

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



Global geopolitics and strategic partners

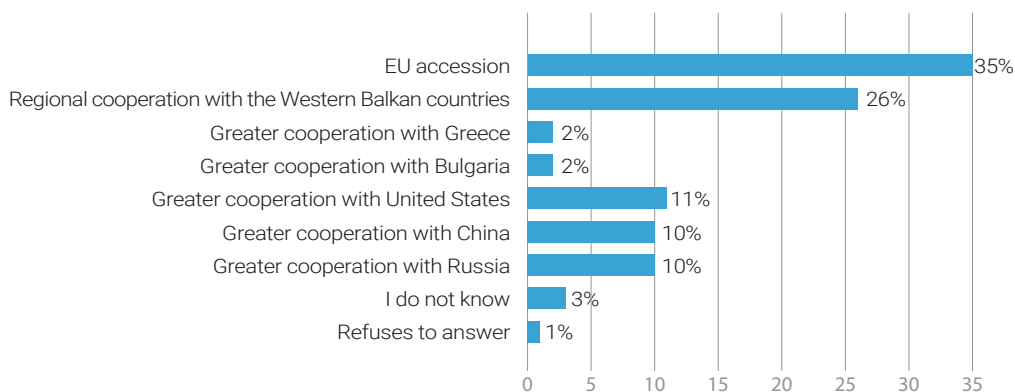
The next set of questions explores respondents' views on global geopolitics and how it affects domestic processes. To begin, we explore opinions on the Government's foreign policy priorities. The results of the survey on the Government's foreign policy priorities show strong citizen support for European integration and regional cooperation.

The highest percentage of respondents (35%) believe that accession to the European Union should be the top foreign policy priority. This shows that citizens recognize the European Union as crucial entity for the country's economic and political development and they support the EU integration process.

Next in importance is regional cooperation with the Western Balkans, which is supported by 26% of respondents. This highlights the need to strengthen regional relations and cooperation, especially in the context of political and economic stability in the Balkans.

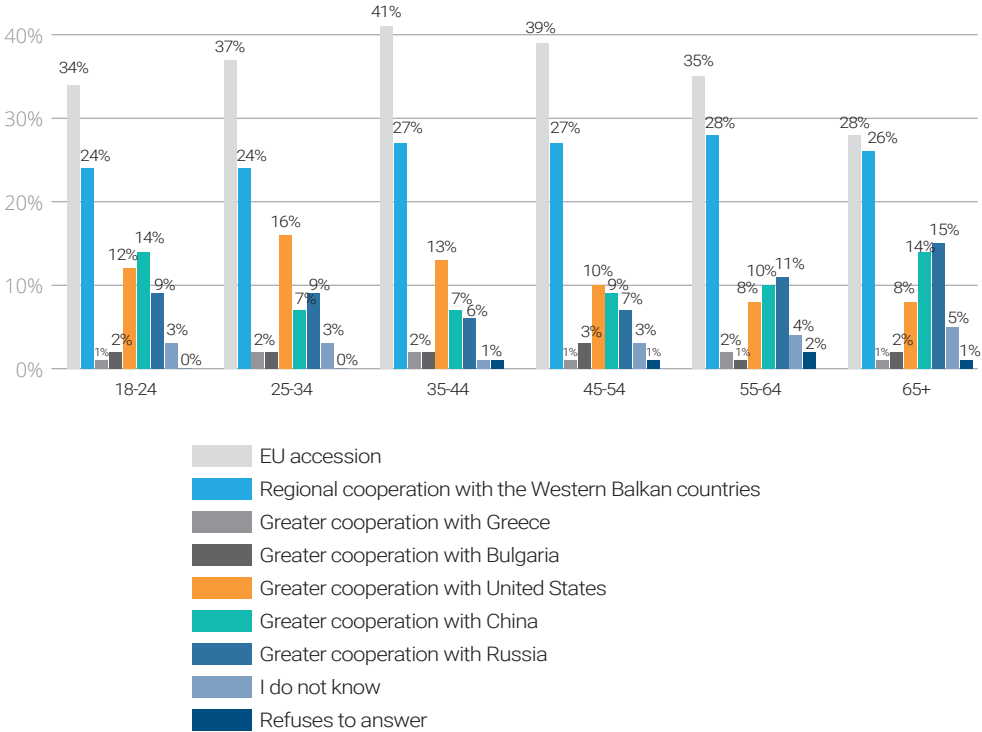
These two options are followed by cooperation with major world powers. Cooperation with the United States (11%) receives greater support compared to Russia and China (10% each), while support for Bulgaria and Greece is minimal (2% each).

Which of the following areas should be a priority in the government's foreign policy?



The results, broken down by age, show that EU accession is the top priority for all age groups, with some differences. The highest support for the EU is observed among the 35-44 age groups (41%) and 45-54 age groups (39%). However, young people (18-24 years old), although also supporting the EU (34%), show greater openness to other options, such as strengthening cooperation with China (14%) and Russia (9%). In addition, the older population (65+) has an even stronger preference for these countries, with 15% for Russia and 14% for China.

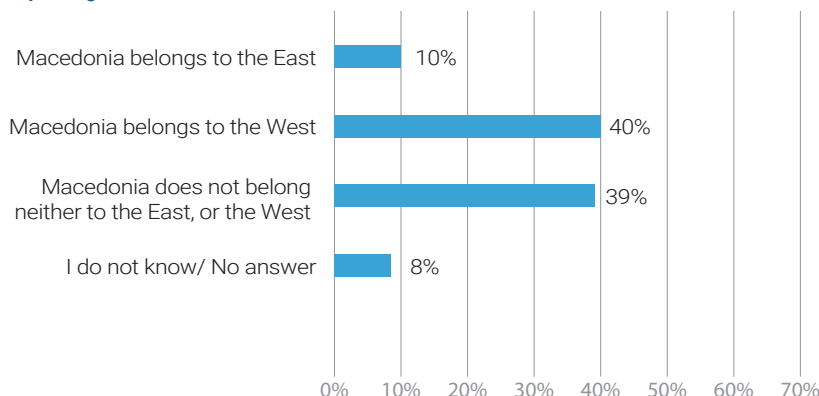
**Which of the following areas should be a priority in the government’s foreign policy?
(age group perspective)**



The results of the survey show divided views among citizens on the geopolitical position. The majority of respondents (40%) believe that we belong to the West, which indicates a dominant orientation towards Europe and Euro-Atlantic integration. This is in line with the political direction of the country, which strives for membership in the European Union and NATO.

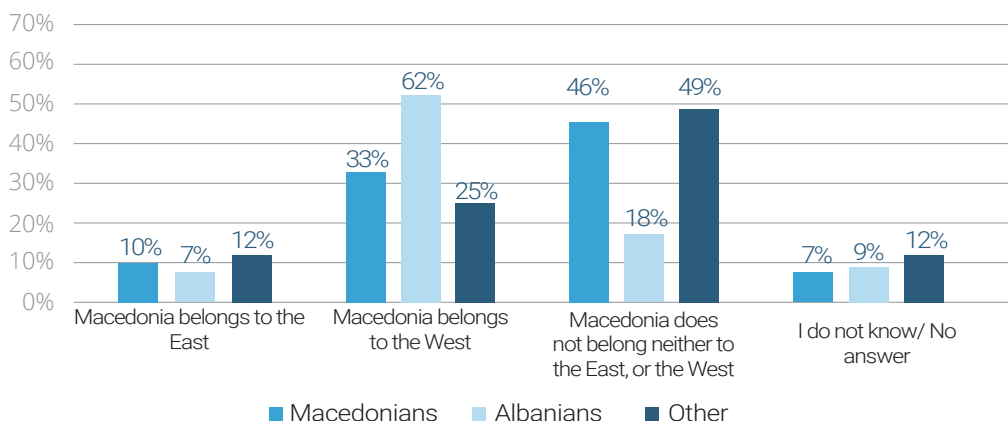
Over a third of respondents or 39% answered that the country belongs neither to the East nor to the West, which can be interpreted as an indicator of the complexity of the national identity orientation, with citizens feeling that they are at the intersection of different cultural and political influences.

Which statement do you agree with?



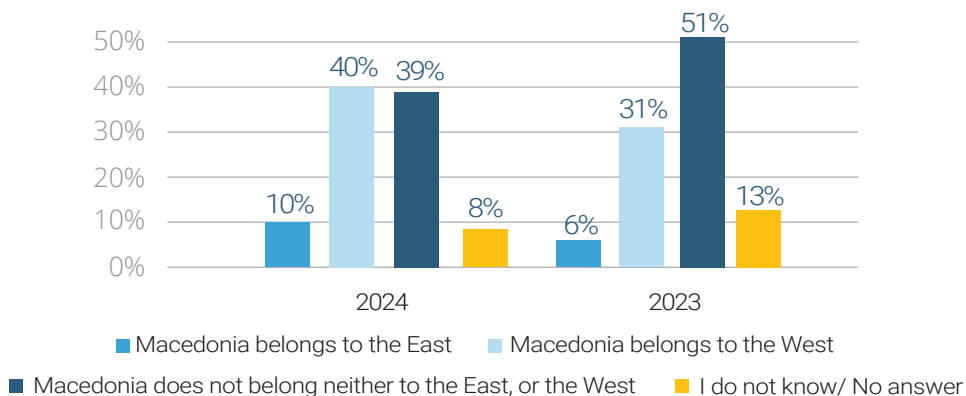
It can be noted that, overall, the attitude towards geopolitical affiliation differs depending on ethnicity. The highest percentage of support for the Western orientation is observed among respondents who are ethnic Albanians (62%), while the division is greater among Macedonian respondents, 33% of which believe that the country belongs to the West, while 46% believe that it belongs neither to the East nor to the West.

Which statement do you agree with? (ethnic background)



In 2023, the majority of respondents (51%) believed that the country "belongs neither to the East nor to the West", while in 2024 that percentage decreased to 39%. At the same time, the number of citizens who see the country as part of the West is increasing (31% in 2023, to 40% in 2024), indicating greater support for Euro-Atlantic integration, compared to the previous year.

Which statement do you agree with? (historical overview)

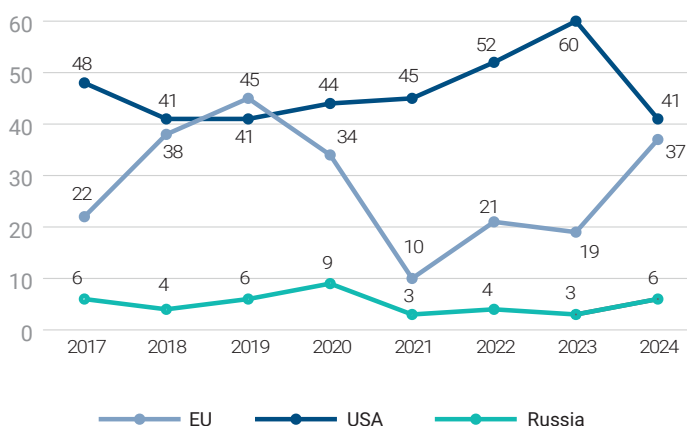


Finally, the last two questions explore citizens' perceptions of the external factor with the greatest influence and who would be the best ally. Traditionally, in 2024, the United States is considered as a factor with the greatest influence by 41% of respondents, but with a certain decline from the 60% in 2023. This may be a consequence of various factors, including global political changes and regional challenges, but also the growing importance of the EU in the process of European integration of Macedonia.

The European Union is again in second place with 37%, which represents a significant increase compared to 19% in 2023.

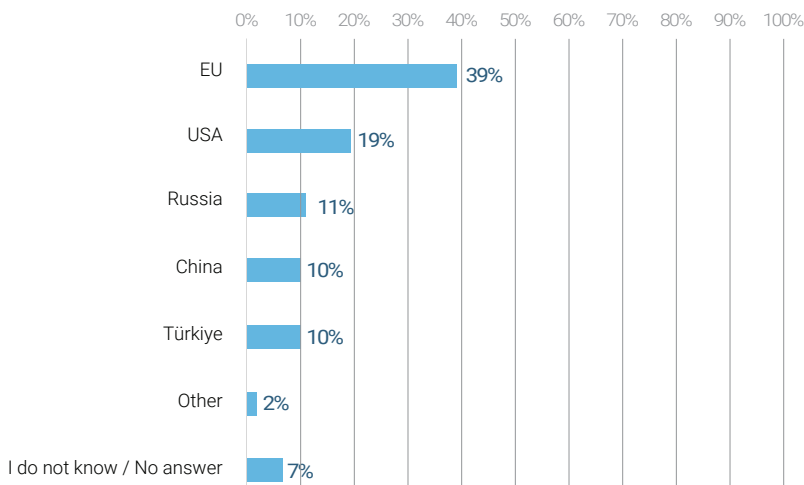
Russia, which has had a relatively low influence over the years, remains with a similar percentage of 6%.

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



The results of the survey on the best ally show clear support for the European Union, which is perceived as the most important ally by 39% of respondents. This reflects a positive orientation of citizens towards European integration and the process of Macedonia's accession to the European Union. The United States is in second place with 19%, while Russia, Türkiye and China are less perceived as key allies, with 11%, 10% and 10% respectively.

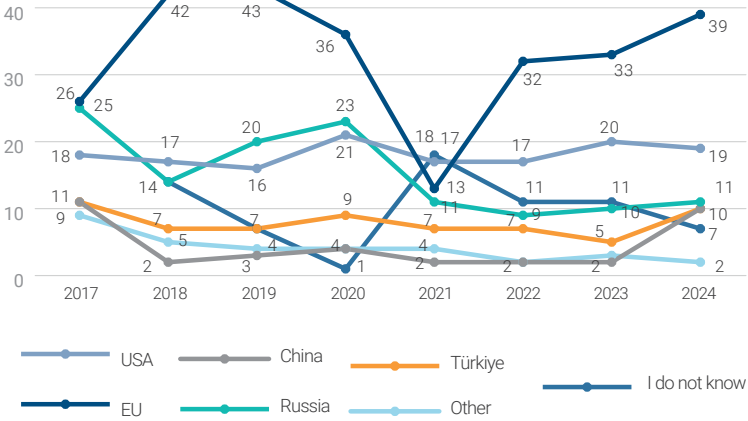
In your opinion, who would be the greatest ally of our country?



The results of the 2024 survey show a continued trend of stabilization in citizens' views on the best ally, with some changes compared to previous years.

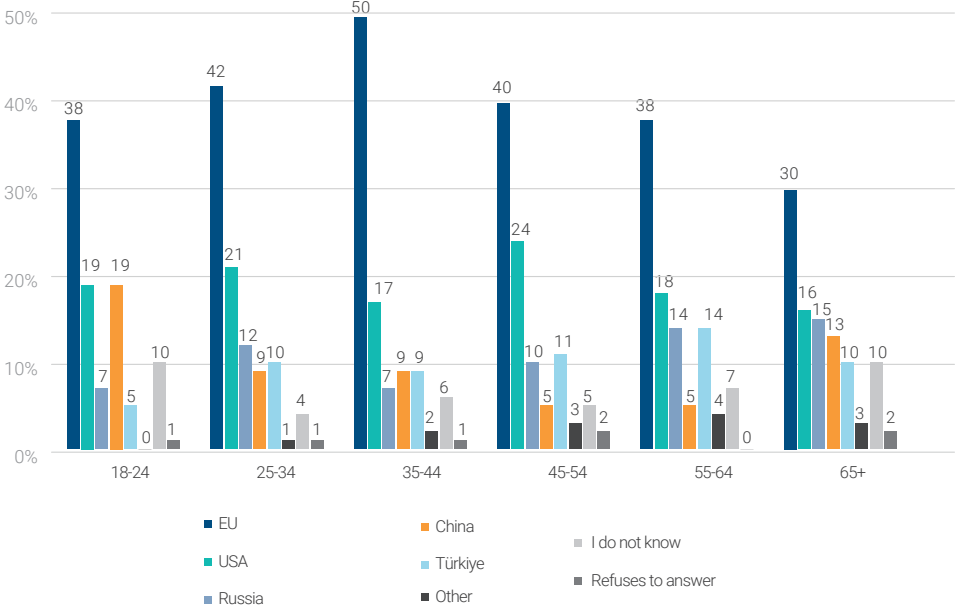
In 2024, the European Union continues to be the most important ally for 39% of respondents, which is an increase from 33% in 2023. This trend indicates growing support for European integration and the EU accession process. The United States remains stable at 19%. Interestingly, Russia, which had 25% in 2017, is now at 11%, indicating a significant decline in its reputation as a potential ally.

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



If we look at this question by age structure of the respondents, we can see that the EU is again the main choice among all ages, and has a maximum support among 35-44 year olds (50%). This is in line with their strong support for EU accession as a foreign policy priority. However, young people (18-24 years old) also show interest in China (19%), while the older population (65+ years old) expresses significant support for Russia (15%).

**In your opinion, who would be the greatest ally of our country?
(age group perspective)**



Conclusion

The change of government in 2024 brought new political priorities – economic development and foreign investment are positioned as main focus of the new government. The public perception about economic partners shows a continued orientation towards the European Union and the United States.

The European integration process remains the most important issue in the country's foreign policy, but there is division in the thinking about how to proceed next. In addition, there is growing skepticism regarding the EU's readiness to accept the Western Balkan countries by 2030. However, the EU remains the most important economic and political partner for the country, which is also reflected in the dominant view that judicial reforms and alignment with European standards are crucial for the accession process.

In terms of geopolitical orientation, the United States continues to be perceived as the factor with the greatest influence, but there is also a significant increase in the perception of the European Union influence.

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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