



PERSISTENT ON THE ROAD TO THE EU?

REPORT FROM THE SURVEY RESEARCH **EUROMETER AUTUMN 2021**
- NORTH MACEDONIA & THE EUROPEAN UNION, CITIZENS
EXPECTATIONS AND ATTITUDES

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1. INTRODUCTION

The main events that marked the period of the conducted research are as follows:

- It is the period following the local elections in which the united opposition won majors' offices in several municipalities;
- The ruling Prime Minister, Mr. Zoran Zaev, announced his resignation from his position as a Prime Minister of the Republic of North Macedonia, and resignation from his position as a President of SDSM;
- Declaration of an energy crisis (expected to affect Europe as a whole), economic crisis, COVID-19 pandemic related circumstances, which are rather alarming;
- The veto imposed on North Macedonia by Bulgaria regarding the commencement of EU accession negotiations; the negotiations with Bulgaria are in a status quo phase due to the local elections in North Macedonia and the early parliamentary elections in Bulgaria;
- Lack of quorum (the affair with the Member of Parliament Kastriot Rexhepi) for impeachment of the Government, particularly spurred by the opposition and media, casts suspicion in terms of non-democratic procedures;
- The opposition has wide media coverage addressing criticism towards the ruling government, rule of law, corruption, etc., calling for resignations and early parliamentary elections;
- Following the announced resignation of the Prime Minister, Mr. Zoran Zaev, the coalition and other political parties/partners have been engaged in continuous negotiations;
- Impacts of other occurrences and phenomena related to the functioning of state-run institutions, such as the fire outbreak in the modular hospital in Tetovo, the bus accident and explosion in Struma;
- To recap, North Macedonia is currently undergoing a social-political crisis.

2. SUMMARY

Forty percent of the population is of the opinion that democracy is non-existent in North Macedonia. Almost a half of the citizens believe that things in North Macedonia are moving in the wrong direction. Sixty-nine percent of the public consider that the 'EU accession of North Macedonia is a positive thing'. EU is perceived as a dominant economic factor and as a Union set on rules and regulations. Forty-eight percent of the citizens are disappointed with the attitude of the European Union towards the Republic of North Macedonia and describe it as unfair and discriminatory as opposed to thirty percent of the citizens that qualify it as fair and amicable.

Despite the afore-stated, almost two-thirds (63%) perceive the European Union as the best alternative to North Macedonia compared to one-third that agree with the statement that North Macedonia is to seek its own development model beyond the European Union. As regards commencement of the negotiation process, one fourth expects that it may commence within the following six months, whereas one third within the following five years.

Despite certain skepticism concerning the European Union, and the date of commencing the accession negotiations, almost three-thirds (74%) of the respondents stated that they would vote 'yes/for' in case a referendum on EU membership was held. The main reasons for EU membership support include improved living conditions and enhanced democracy (judicature, freedom of media, rule of law, etc.). Fifteen percent of the respondents that would vote 'no/against' at such a referendum are actually Euroskeptics, who believe that there would be no improvements, that the living standard would deteriorate, the migration would intensify, etc.

Nowadays, the general assessment of the international position of North Macedonia is weaker compared to the same position 12 months ago, but, nonetheless, it is estimated that it shall intensify in 12 months again. A higher, yet similar percent (42-44%) of citizens, estimates that the position is the same as 12 months ago, and that it will remain the same in some 12 months from now.

As regards the international position of North Macedonia, one third of the respondents rest assured that there are states/institutions that pose a threat to North Macedonia. Bulgaria is declared as the major threat (23%), whereas the percentage of the others is significantly lower (within the range of 0-2%). As opposed to the afore-stated, but, yet, within the same context, the major allies of North Macedonia are as follows: Serbia (24%), the USA (17%), EU (9%), Turkey (9%), Germany (5%), etc.

3. METHODOLOGICAL NOTE

The opinion polling was conducted by the agency Brima from Skopje via a Computer Assisted Telephone Interviewing (CATI) using the NIPO platform in the period between November 23rd and November 30th 2021 on a representative sample of 1001 respondents, and with a margin of error of +/- 3%. Brima is held responsible for the methodological accuracy of the polling whereas the questionnaire was drafted by the research team of Centre for European Strategies EUROTHINK in cooperation with Brima. In the course of the research, data from surveys conducted since 2014 onwards were used. These surveys have been conducted by various local agencies as commissioned by EUROTHINK.

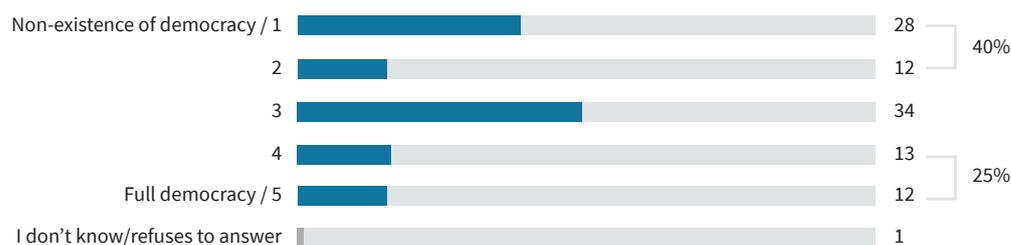
4. ON THE DEMOCRACY IN NORTH MACEDONIA

The first topic of this survey consists of a set of questions pertaining to the public's perception of North Macedonia as a democratic state. A measurement scale ranging from 1 to 5 was used for the evaluation of this question, where 1 equals non-existence of democracy whereas 5 equals full democracy. There is evident discrepancy in terms of the public's perception of this question. Namely, 12% are of the opinion that full democracy does exist in North Macedonia, whereas 28% claim that democracy is non-existent in the country. Elaborated on further, almost a quarter (25% = cumulative of answers 4+5) are of the opinion that democracy does exist in North Macedonia, as opposed to 40% of the respondents who are of the opinion that democracy is non-existent in North Macedonia (cumulative of answers 1+2). The results are presented in Graph 1.

Graph 1:

Generally speaking, is North Macedonia a democratic state?

On a scale from 1 to 5, where 1 presupposes non-existence of democracy, whereas 5 presupposes full democracy, what is your mark?



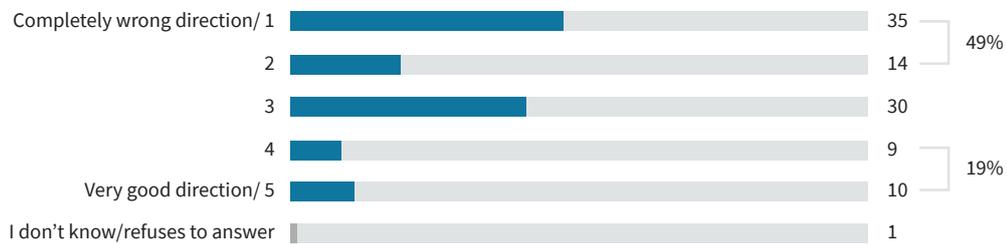
The perception of non-existence of democracy in North Macedonia is predominant among the Macedonian respondents, the elderly respondents (aged 55 plus), VMRO-DPMNE supporters as opposed to SDSM supporters (established as respondents that at that given moment would vote for VMRO-DPMNE as a political party or SDSM respectively).

This topic also tackles the question of the direction of the country (Graph 2).

Graph 2:

Generally speaking, what is the direction that North Macedonia is moving to?

What is your mark again on a scale from 1 to 5, where 1 denotes a completely wrong direction, whereas 5 denotes a very good direction?



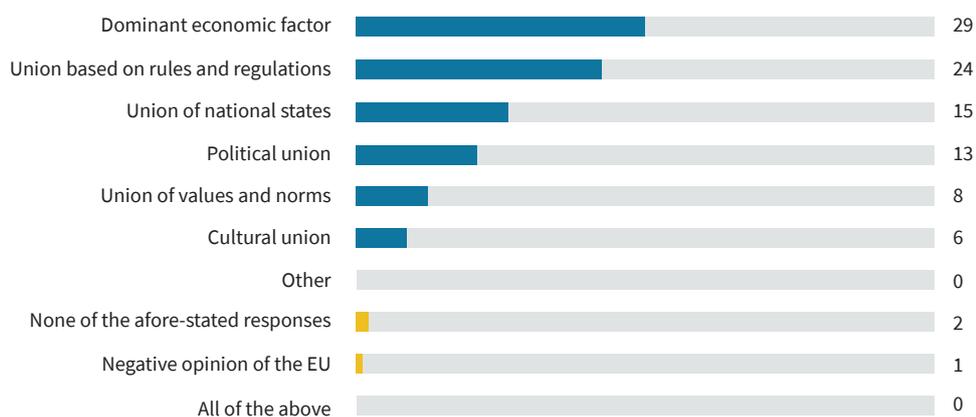
Almost a half of the respondents (49%) consider that for the time being things in North Macedonia are moving in the wrong direction. This perception is predominant in the case of the Macedonia respondents, the one residing in urban areas and among the supporters of VMRO-DPMNE.

5. NORTH MACEDONIA-EU RELATIONS

A higher percentage of the citizens (29%) perceive the European Union as a dominant economic factor (the economic aspect) and also due to the fact that its foundation lies on rules and regulations (24%). The terms 'rules and regulations' may freely be interpreted as rule of law and adherence to laws and regulations. The rules and regulations have increased in relevance as opposed to the previous research where a high percentage of the citizens regarded the Union primarily as a political union.

Graph 3

What does the Union represent for you?



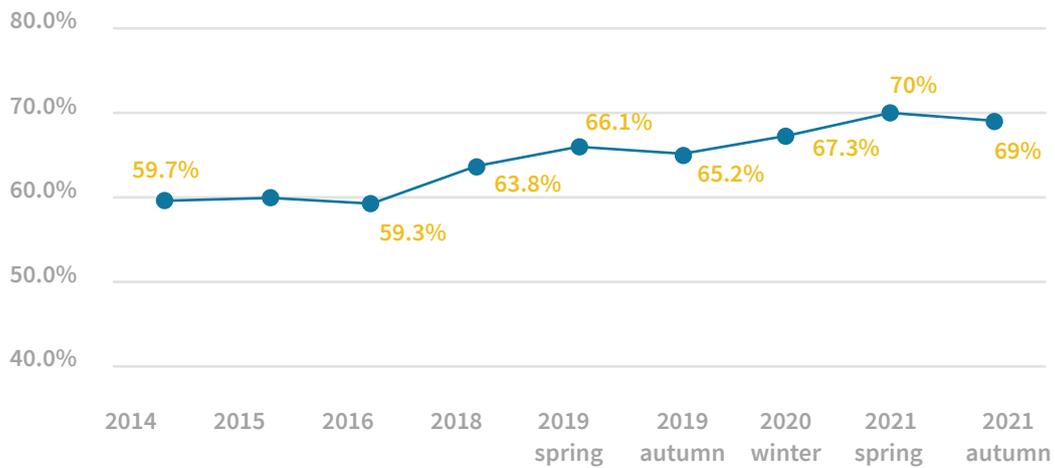
Fifteen percent of the respondents perceive the European Union as a union of national states, which is however, a shift from the past perceptions, when a significantly fewer number of citizens shared this viewpoint.

About 2% stated that none of the afore-stated referred to the European Union, but without producing their opinion and viewpoint of the European Union (regardless whether it is positive or negative), whereas 1% produced an explicitly negative viewpoint of the European Union.

The citizens' attitude as regards the Euro-integration processes was measured via the question of their agreement with the claim that the EU membership would be positive for North Macedonia. In this respect, 69% (cumulative of answers 4+5) agree with this statement, which is a negligible decline by one percent compared to last year.

Graph 4:

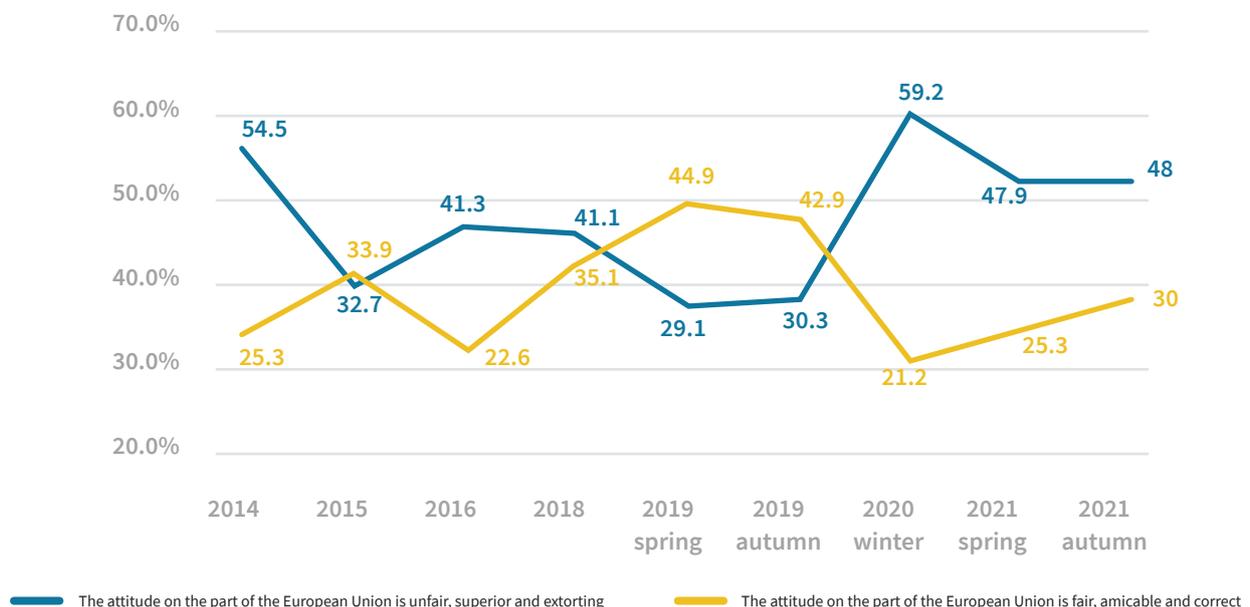
To what extent do you agree with the following statement on a scale from 1 to 5, whereby 1 implies that you fully disagree with the statement whereas 5 implies that you fully agree with it: **In general, would EU membership be a positive thing for North Macedonia?**



The public opinion as to the attitude of the European Union towards North Macedonia (Graph 5) is ultimately divided. Namely, 37% state that the attitude of the EU is unfair, superior and extorting (or a total of 48% as a cumulative of responses 1+2) as opposed to the other opposing view that are of the opinion that the attitude of the European Union towards North Macedonia is fair, amicable and correct. As it may be observed from the previous surveys, in spite of the halted integration process and the veto imposed by Bulgaria, the reputation of the European Union has slightly improved, at least as regards positive feelings.

Graph 5:

Generally speaking, how would you assess this attitude on a scale from 1 to 5, where 1 implies that the attitude on the part of the European Union is unfair, superior and extorting, whereas 5 implies that the attitude on the part of the European Union towards North Macedonia is fair, amicable and correct?



This discrepancy is noticeable also in terms of ethnicity. Namely, 52% of the Macedonians state that the attitude of the European Union is unfair, superior and extorting as opposed to 60% of the ethnic Albanians that state that the attitude is fair, amicable and correct.

Support or affiliation to a given political party is another discriminatory factor as regards the public opinion on this. Sixty-seven percent of the VMRO-DPMNE supporters rate the attitude with 1, meaning that the attitude on the part of the European Union is unfair, superior and extorting as opposed to 32 % of the SDSM supporters. As regards the Albanian parties, the predominant position and rating is 5, meaning that the attitude on the part of the European Union towards North Macedonia is fair, amicable and correct.

Despite the divided opinion on the attitude of the European Union towards North Macedonia, almost two-thirds (63%) consider the European Union the best alternative for North Macedonia. As a matter of fact this is the highest percentage received with reference to this question compared to the previous years and is a token of intensified Euro enthusiasm. However, one third (33%) believe that North Macedonia is to be on a lookout for its own development model beyond the European Union, which is a decline compared to the previous two surveys and a return to the 2019 figures (Graph 6). Most probably the promises that the process would be unblocked in mid-December have positively affected the citizens' attitudes as regards the European Union.

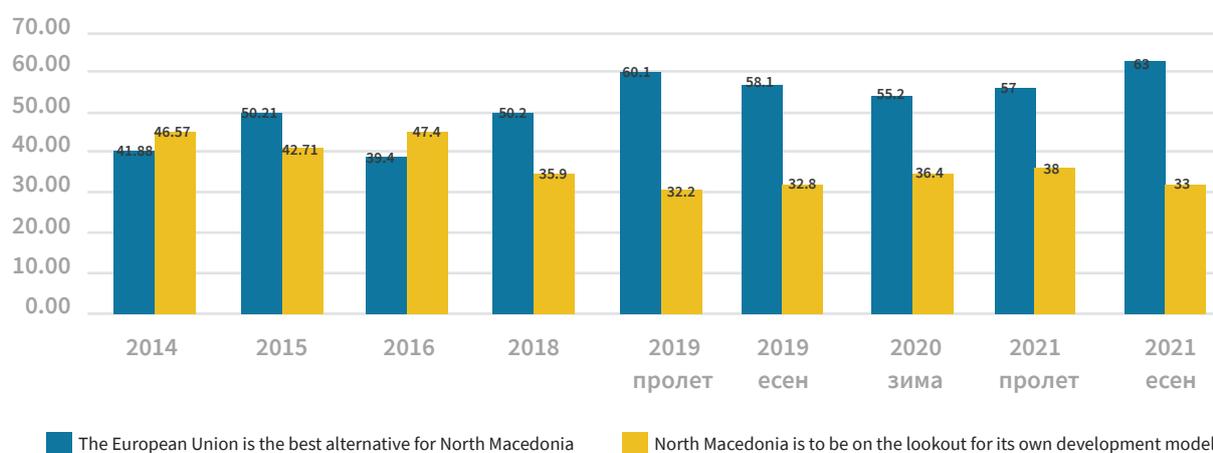
Graph 6:

Now, I would like to ask you about a dilemma prevailing among the public. I am going to read out to you two statements.

Please tell me which one is more closely linked to your opinion:

- The European Union is the best alternative for North Macedonia;
- North Macedonia is to be on the lookout for its own development model beyond the European Union.

Is the European Union the best alternative or should North Macedonia be on the lookout for its own development model?



It is evident that the attitude on the part of the public regarding this issue is determined by the political preference.

Namely, eighty-two percent of the SDSM supporters consider the European Union as the best alternative for North Macedonia. This statement is also supported by 32% of the VMRO-DPMNE supporters. In the case of the Albanian political parties, the agreement with this statement is rather high (88% with the Alternative political party supporters, and up to 97% with the DUI supporters).

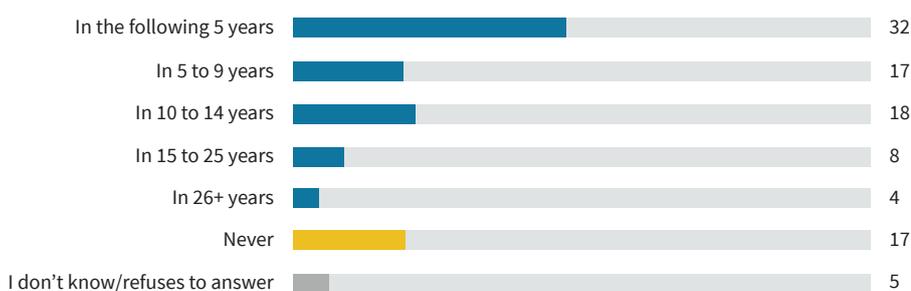
Contrary to the afore-stated, 65% of the VMRO-DPMNE supporters are in favour of the statement that North Macedonia is to be on a lookout for its own development model beyond the European Union (which is also the viewpoint of 17% of the SDSM supporters). The agreement with this statement is negligible among the Albanian block (within the range of 1 to 4%).

The actual commencement of negotiations between North Macedonia and the European Union within the following six months is anticipated by a quarter (26%) as opposed to 63% that remain skeptical, and are of the opinion that the accession negotiations shall not commence in the next six months.

Nonetheless, quite a high percentage of the respondents (32%) (Graph 7) are of the opinion that the accession negotiations shall commence in the next five years. This is primarily contemplated by the young (aged 18 to 34), the Albanian respondents and the SDSM supporters. Additionally, it is a noticeable decline in the expectations compared to the previous survey this year when it amounted to 41%.

Graph 7:

According to you, when can North Macedonia expect to join the European Union?



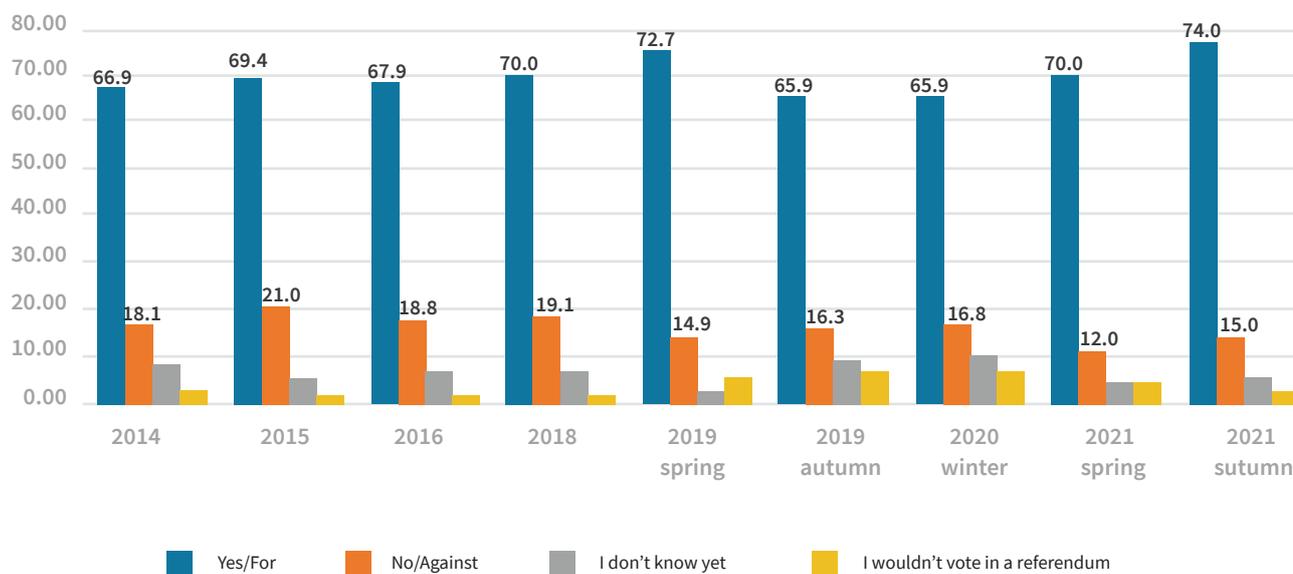
It is worth underlining that 17% of the respondents are of the opinion that North Macedonia shall never join the European Union.

Despite the certain level of skepticism towards the European Union and the date of the accession negotiations, almost three quarters (74%) of the respondents stated that they would vote 'yes/for' if a referendum for joining the European Union was held. It is worth highlighting that this is the highest percentage since EUROTHINK has been measuring these issues.

Approximately 15% of the respondents would vote 'no/against' (Graph 8). There is a slight increase in this percentage compared to this spring, but, yet it is within the stable 14-15% since 2019.

Graph 8:

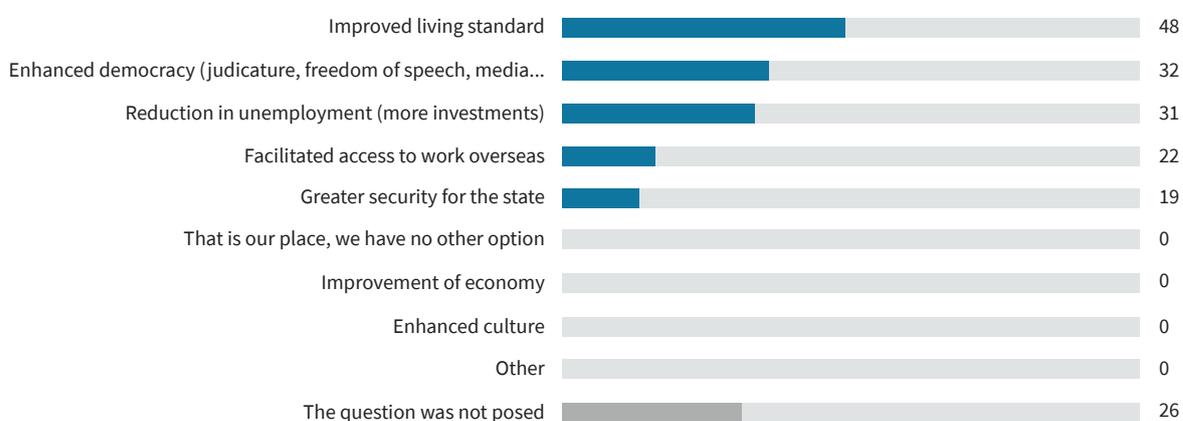
Provided that this Sunday there was a referendum on the question 'Are you in favour of North Macedonia joining the European Union', how would you vote?



As the reasons for voting 'Yes/For', the highest percentage (48%) is attributed to the improved living standard, enhanced democracy (judicature, freedom of speech, media, rule of law, etc.) as well as reduction in unemployment (more investments) (as indicated in Graph 9a). This viewpoint is in line with the belief that the European Union is primarily an economic union and the Macedonian citizens expect that their existential issues would be resolved. Nevertheless, a rather high percentage of the citizens (32%) are pro-democratically motivated to cast a vote for joining the European Union.

Graph 9a:

Main reasons for supporting the EU accession (a multiple choice option):



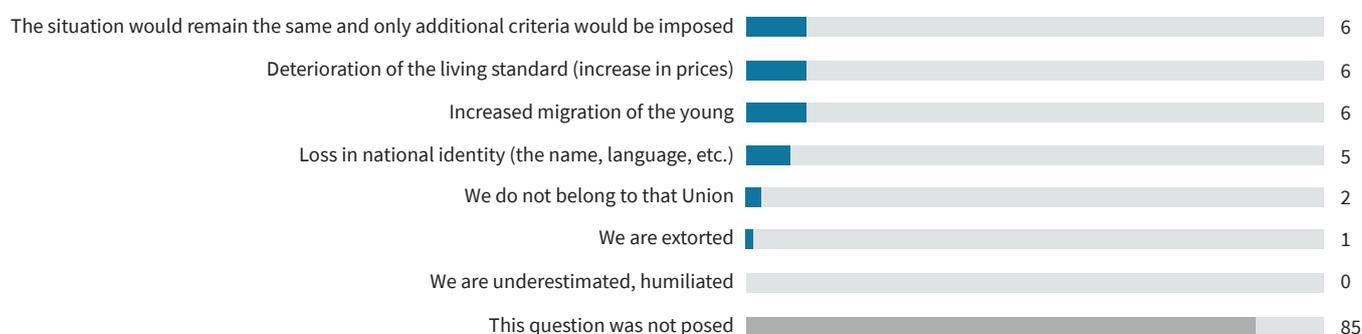
It is evident that the answer ‘enhanced democracy’ is largely stated by the elderly citizens, by the citizens with higher education and by the Albanian respondents, whereas the answer ‘facilitated access to work abroad’ is opted for by the young.

Contrary to the afore-stated, fifteen percent of the respondents who would vote against EU accession put forward the following as reasons for their belief: the situation would remain the same and only additional criteria would be imposed (6%), followed by an increase in prices, deterioration in the living standard (6%), migration of the young (6%), loss in identity (in terms of the name, language, etc.)

(Graph 9b)

Graph 9b:

Main reasons for the disapproval of the EU accession (a multiple choice option):



6. FOREIGN POLICY

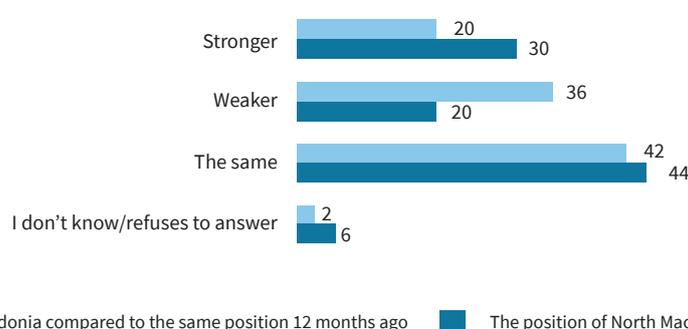
With reference to this theme, the respondents were asked to assess the international position of North Macedonia compared to the period from 12 months ago and to give a forecast of the position in the forthcoming 12 months (Graph 10/11).

Graph 10/11:

International position of North Macedonia

T10. Is the international position of North Macedonia stronger, weaker or the same compared to the position 12 months ago?

T11. Do you expect the international position of the state to be stronger, weaker or the same as of today?



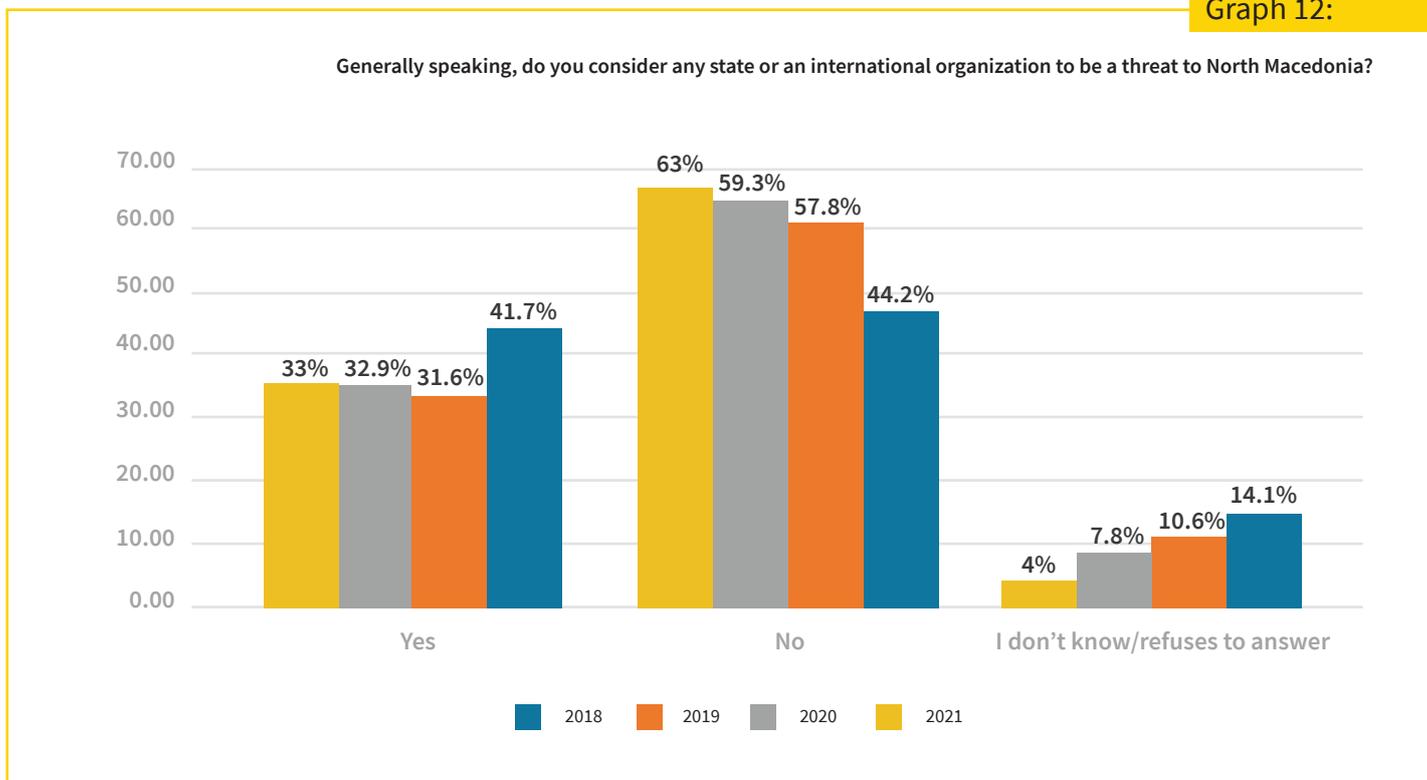
Overall, it is assessed that nowadays the international position of North Macedonia is weaker compared to the same position 12 months ago. This question marks a divided viewpoint on a political party affiliation. Namely, the weaker position is primarily highlighted by the VMRO-DPMNE supporters, as opposed to the SDSM and DUI supporters who underline that nowadays the international position of North Macedonia is stronger compared to 12 months ago.

However, there is some optimism concerning the opinion about the international position of North Macedonia within 12 months. Hence, 36% believe that the position shall be stronger as opposed to 20% that believe that the position shall be weaker.

The percentage of citizens that believe that the international position of North Macedonia is the same as it was 12 months ago amounts to 42% and is within the same ratio (44%) with the viewpoint that it shall remain the same in 12 months. The in-depth analysis indicates high correlation between these two issues. The respondents that are of the opinion that the present position is stronger are also of the opinion that the position shall be stronger in 12 months from now. Similarly, the respondents that are of the opinion that the present position is weaker, are also of the opinion that the international position of North Macedonia shall remain weaker in 12 months from now. The same viewpoint is noticeable in the respondents that believe that the position is the same (unaltered) and that it shall remain unaltered in 12 months.

With reference to the relations of North Macedonia with Europe and beyond, the respondents were asked whether for the time being they considered a given state or an institution a threat to North Macedonia (Graph 12).

Graph 12:



One third (33%) are of the opinion that there is such a state or an organization that poses a threat to North Macedonia, whereas 63% believe the opposite. Compared to the previous years, the respondents that believe in the existence of a threat range within the figures of one third three years consecutively, whereas the ones that do not believe in the existence of a threat mark an increase in approximately 3%.

With reference to the afore-stated, the respondents were asked to name the country or international organization that poses a threat to North Macedonia (Graph 12a).

Approximately one quarter (23%) consider Bulgaria to be the greatest threat to North Macedonia for the time being. This percentage is higher among the Macedonians compared to the ethnic Albanians. The shift in the perception of Greece as a threat is particularly noticeable. Greece used to be ranked higher, but it marks a continuous decline to less than 2%, which is a direct outcome from the Prespa Agreement. As regards Bulgaria, there is an evident decline in this figure compared to last year when the vast majority of citizens considered Bulgaria to be a threat (almost 80% of the ones believing in the existence of a threat), and its present ranking is on the level of 2018.

Graph 12a:

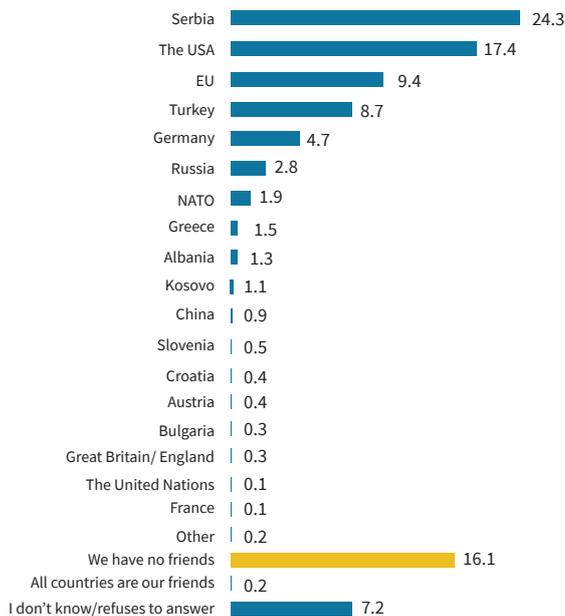
If there is a threat, which state or international organization poses a threat to North Macedonia?



The following question is regarding the country or international organization that is the greatest friend of North Macedonia (Graph 13).

Graph 13:

According to you, which country or international organization is the greatest friend of North Macedonia?



A quarter of the respondents (24%) pinpoint Serbia as the greatest friend of North Macedonia, followed by the USA (17%), the European Union and Turkey (9%), etc.

Sixteen percent of the respondents declared that North Macedonia had no friends.

Serbia is perceived as the greatest friend to North Macedonia with a higher percentage among the Macedonians, as opposed to the USA and EU as the greatest friends among the ethnic Albanians.

In the case of the young, this is the EU, whereas in the case of the elderly, it is NATO.

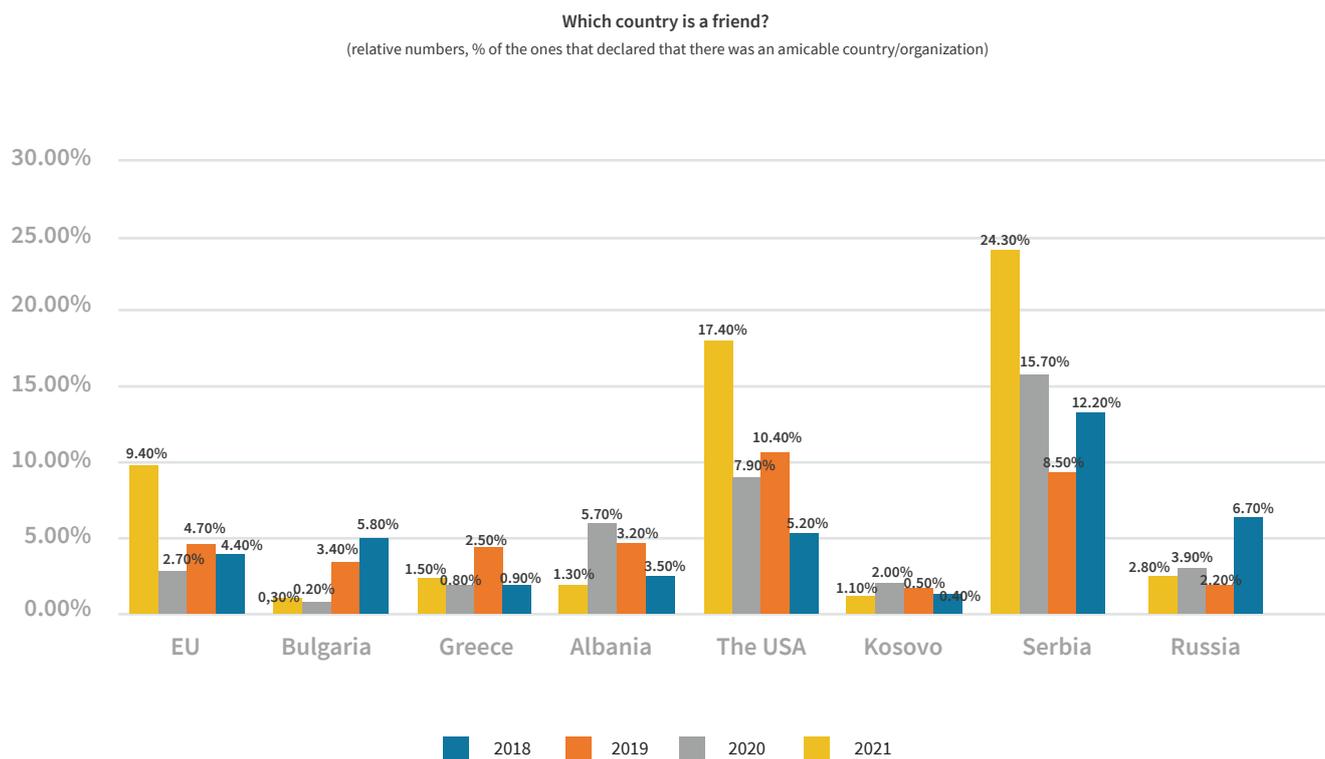
The supporters of the Albanian parties pinpoint the USA and EU.

Forty-two percent of the VMRO-DPMNE supporters consider Serbia as the greatest friend as opposed to twenty-two percent that believe that North Macedonia has no friends.

As for the SDSM supporters, the overview is as follows: 25% consider Serbia as the greatest friend, 16% the USA, 14% Germany, 10% of the belief that North Macedonia has no friends, etc.

Graph 13a:

According to you, which state or international organization is the greatest friend of North Macedonia? (Historical comparison)



In comparison to the previous surveys, a marked incline is observed in the case of Serbia as the greatest friend of the country, which may directly be ascribed to the vaccination solidarity of our northern neighbor in the course of 2021. Nevertheless, there is noticeable increase in the EU and USA percentages compared to the previous years, which may be attributed to the support that is given to North Macedonia by the USA with reference to the dispute with Bulgaria.

