



Media briefing –
**Public Opinion
Analysis on citizens’
perception about
the European Union,
External Actors
and Trust: Focus on
North Macedonia**

December 2021

About the survey

The primary data used in this BiEPAG/EFB media briefing come from a public opinion poll conducted in North Macedonia during the period of July and August 2021. The Survey was also conducted in all the other countries in the Western Balkans. It was administered on a nationally representative sample consisted of minimum 1000 respondents aged 18+, using mix mode: telephone and online interviews – CATI (Computer Assisted Telephone Interviewing) and CAWI (Computer Assisted Web Interviewing), while post-stratification was done by region, gender, age, type of settlement and education. Data collection was implemented by Ipsos Strategic Marketing, and it was commissioned by the European Fund for the Balkans.

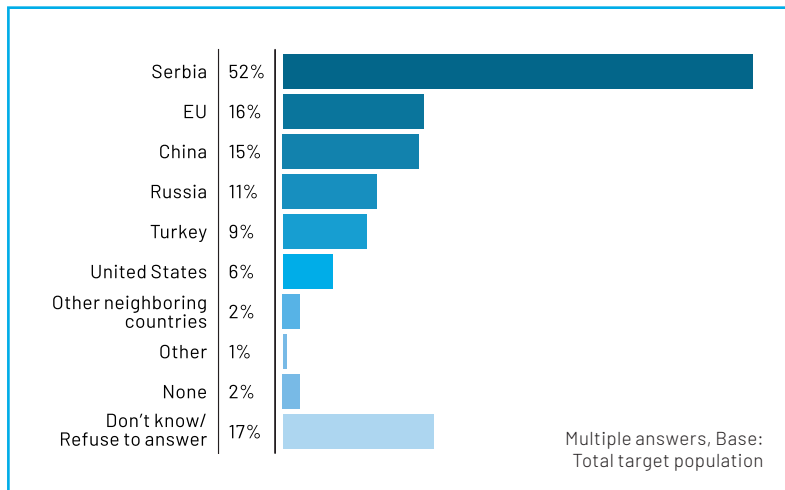
Authors: Florian Bieber and Zoran Nechev



Democracy and the Covid19 pandemic

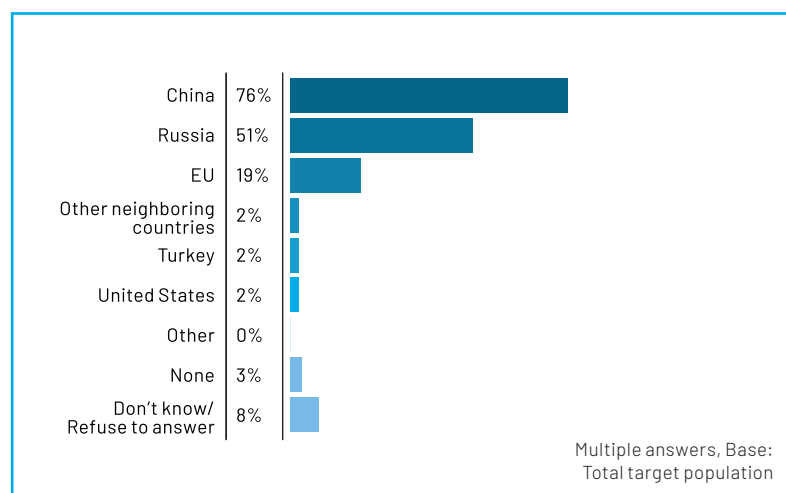
Respondents perceive Serbia's assistance during the Covid19 pandemic as the biggest among the given options. More than half of the respondents' (52%) primary choice is Serbia, whereas the EU comes second with a low percentage (16%), compared to Serbia, placing it at only 1% above China. Just after, Russia stands at 11%. 17% of the respondents refused to answer or did not know the answer to this question. The high support for Serbia comes as a surprise as even other Western Balkan countries with significant Serbian ethnic presence rank Serbia's support as lower, such as Bosnia and Herzegovina (44%), and Montenegro (31%).

Which countries/blocs provided most help to North Macedonia during the pandemic?



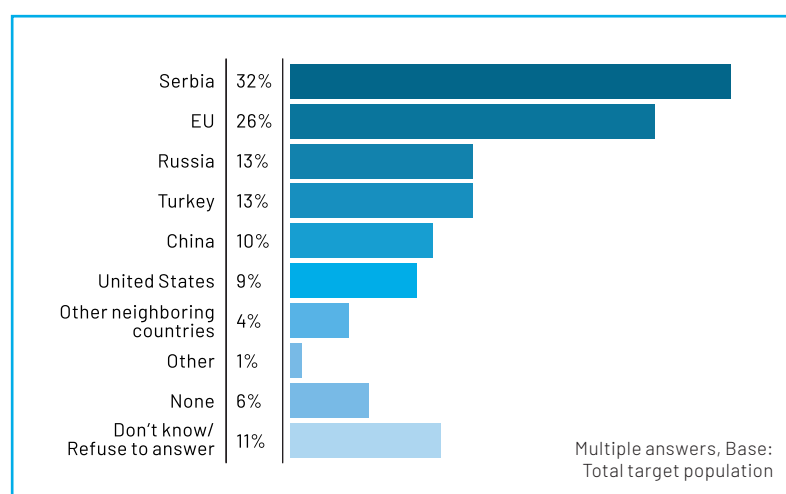
On the other hand, data from the survey conducted in Serbia reveals that Serbs perceive China as the largest provider of assistance during the pandemic with 76%, followed by Russia with 51%. Here, the EU comes only 3rd with 19%.

Which countries/blocs provided most help to Serbia during the pandemic?



When it comes to expectation for further support, a majority of respondents continues to expect Serbia to provide most of the assistance. However, the difference between Serbia, rated first with 32% and the EU, rated second with 26% is much lower compared to the difference on the question “Who provided most help during the pandemic?”. Nonetheless, these high numbers of trust in Serbia distinguish North Macedonia from the rest of the region. It is also interesting to observe that respondents place Serbia in the same basket as the other external actors, all of whom are global powers such as the EU, US, Russia and China.

Which countries/blocs do you expect to offer most help in assisting North Macedonia to overcome the Covid-19 crisis?



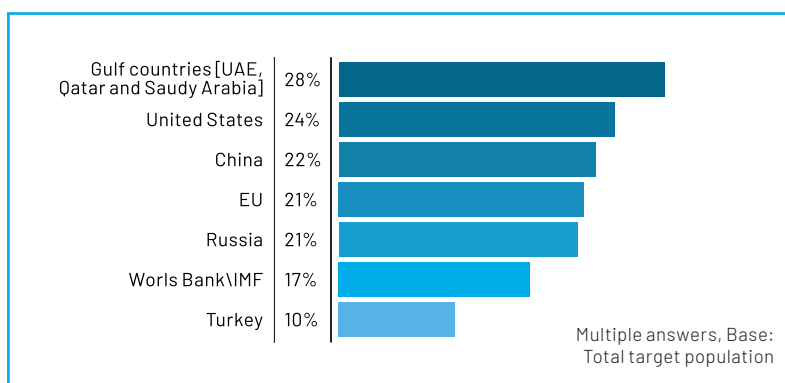
The EU's strategic communication can and must do more and better especially in a country where its favorable position in the media remains uninterrupted. The government in Skopje needs to strive to provide relevant and timely data and information at all times so that the citizens have a clear picture of the situation, i.e. where support comes from in a given situation. In this specific case, they have failed collectively.

When it comes to providing assistance to North Macedonia since the start of the Covid19 pandemic, the timing, rather than the actual quantity, was crucial for shaping the citizens' perception. Serbia opened its vaccination points for Macedonian citizens early in the pandemic and was the first country to donate vaccines (Pfizer-BioNTech) to North Macedonia. The Ministry of Health of North Macedonia still has no relevant and accurate data on how many of their citizens have been vaccinated in Serbia since the beginning of the pandemic. However, there exists data on how many vaccines North Macedonia has received from abroad. As of 1st of December 2021, North Macedonia has received/purchased 2.097.162 vaccines, out of which 921.180 are a donation. Most of these donated vaccines (741.000) have come from the EU and EU member states.¹ In addition to the unknown number of doses given to Macedonians in Belgrade and other Serbian cities, 48.180 vaccines have been donated from Serbia, 30.000 from Turkey and 100.000 from China.

Besides the perceived help, the survey also looks at the positive and negative influence of different countries/blocks on North Macedonia (not limited to the pandemic). This again depicts an ambivalent and fissured picture. While the gulf countries receive the least support, the US, China, the EU and Russia all seemingly have their fans and foes. Remarkably, 49% of respondents assess the influence of Turkey as "very positive" and only 10% consider the country's influence as "very negative". The data does not tell us what exactly conditions these results, but these relations would be worth digging into. Right after Turkey, the EU enjoys 41% of positive responses compared to 21% who assess its impact as negative - only 4 percentage points ahead of Russia (37%).

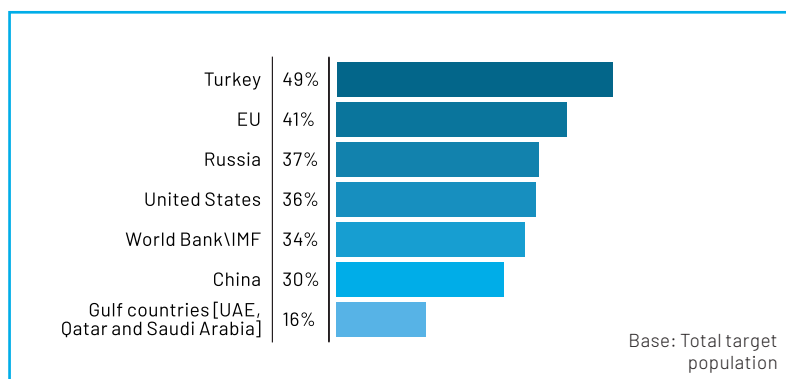
The questions asks for all kinds of influence such as political, economic, military and cultural and respondents could refer to both measurable political impact of financial support, or to "soft factors" such as a sense of shared identity or admiration for practices, policy or values in the corresponding country.

Assess positively/negatively the influence (e.g. political, economic, military, cultural etc.) of the following countries/blocks to North Macedonia - Very negative



¹ HBO Инфоцентар, „Патот на вакцините до Северна Македонија, #КовидИмунометар, 24–30 ноември 2021“
http://nvoinfocentar.mk/wp-content/uploads/2021/12/ImmunoMeter-27_-24-30-November-2021.pdf

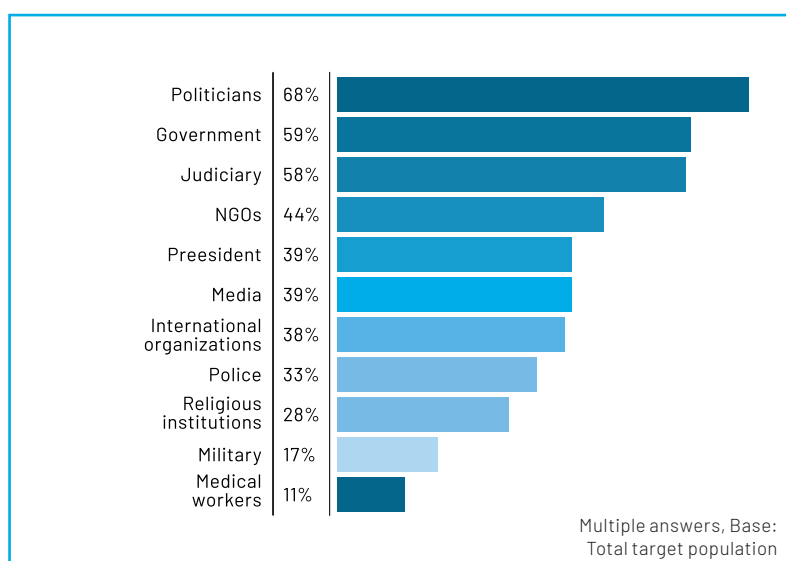
Assess positively/negatively the influence (e.g. political, economic, military, cultural etc.) of the following countries/blocks to North Macedonia – Very positive



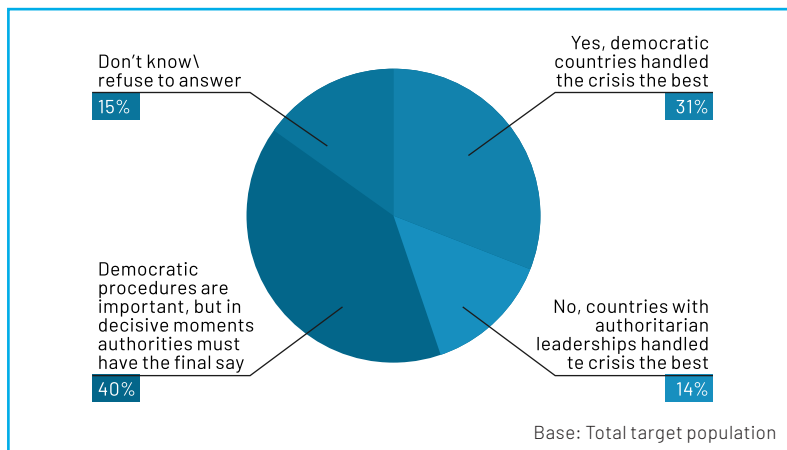
When asked about institutional trust, the trust in the government, the judiciary and especially politicians (68.3%) is the lowest among the respondents in North Macedonia. 53.2% do not trust the government at all, and if we add the percentages of somewhat not trust, the overall “don’t trust camp” is at 58.6%.

The lack of trust in the two main pillars of a genuinely democratic society has direct consequences of the way local communities understand/perceive democracy and the division of power. When asked “Do you believe that democracy is important for solving crises like the Covid19 pandemic?”, the highest percentage of respondents, 40%, answer that democratic procedures are important, but in decisive moments authorities must have the final say. Additional 14% express the belief that countries with authoritarian leadership (strongmen) handled the crisis the best. 31% answer that this is best done by democratic countries. The data on the judiciary is similar. 57.8% of respondents do not trust the judiciary, whereas out of which 52% “do not trust et all” the judiciary.

To what extend do you trust following institutions? – Don't trust

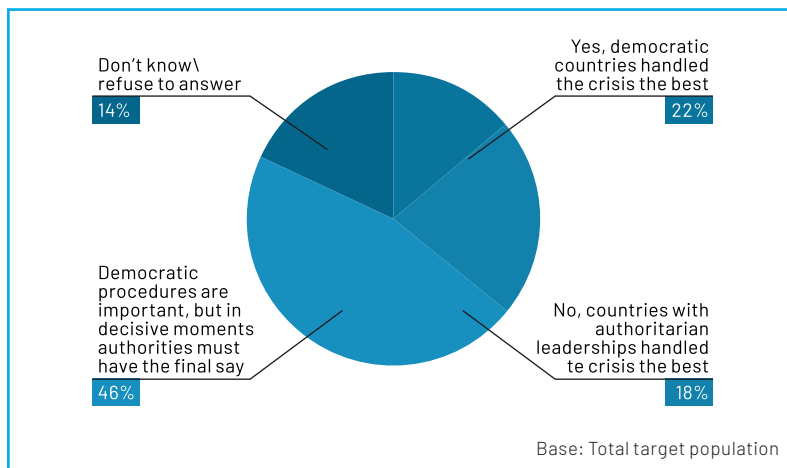


Do you believe that democracy is important for solving crises like the Covid pandemic?



It is worth noting that among the Serbian respondents, 64% confirm the statement that strongmen and authoritarian leadership are required in such a situation. The appreciation for Serbia among respondents in North Macedonia, in addition to the positive effect of the Serbian vaccine diplomacy, can be detrimental for the long-term sustainability of democracy and democratic trends in North Macedonia.

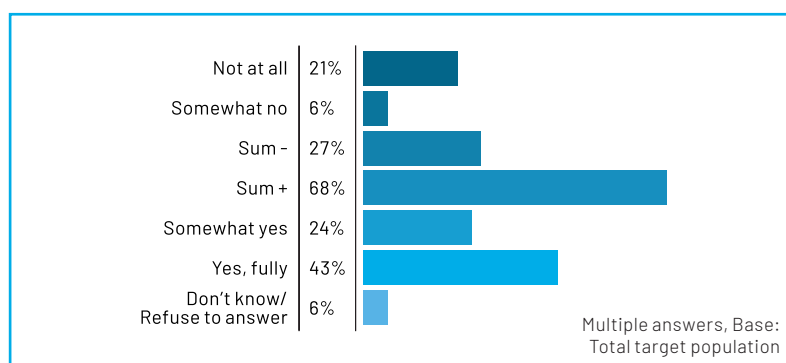
Do you believe that democracy is important for solving crises like the Covid pandemic?



Geopolitical feelings

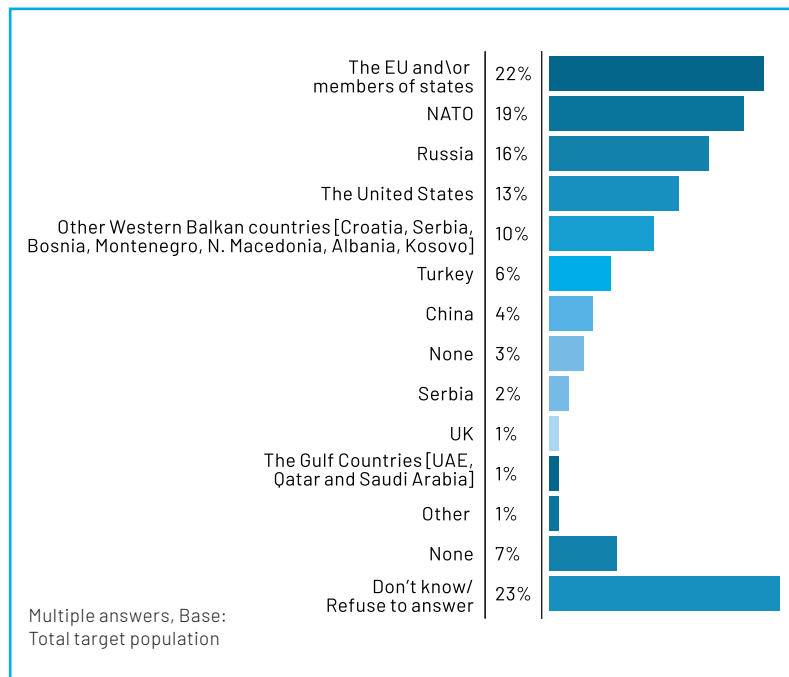
The majority of the respondents (68%) would support North Macedonia's membership in NATO if the referendum was held again. Compared to the other NATO member states in the region, North Macedonia ranks second, right after Albania (89.1%) but before Montenegro (55.7%) in terms of popular support for the membership in the North-Atlantic pact.

Despite the fact that North Macedonia is already a member of NATO, would you be in favor of North Macedonia's NATO membership if the referendum were held again?



Security can be understood not only in terms of physical security, that is, military strength and states' ability to deter. In the same vein, security can mean different things to different people. In this survey, however, security is approached through rather classical lenses, that is, as physical security. Nonetheless, NATO is not seen as North Macedonia's only security provider. In fact, the majority of respondents believes that for its national security, the country should rely more on both the EU/and or member states and NATO as the differences in support between the two is within the margin of error, along with the "don't know/no answer" option. Russia comes third as a single security provider, slightly before the US and North Macedonia's Western Balkan neighbours.

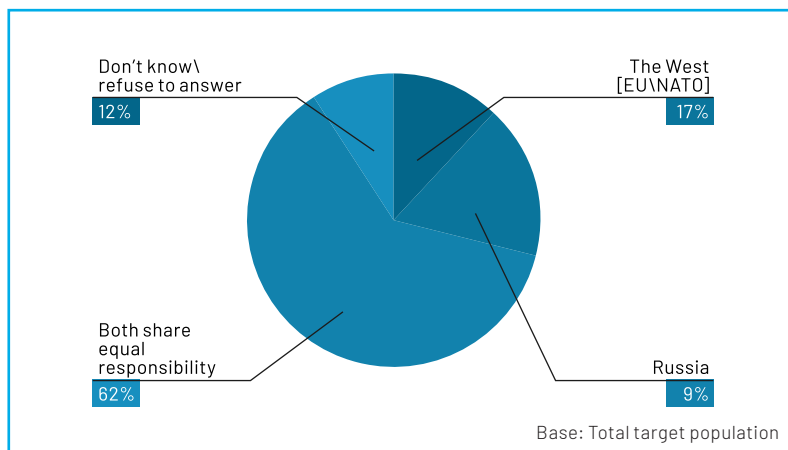
For its national security, North Macedonia should rely more on...



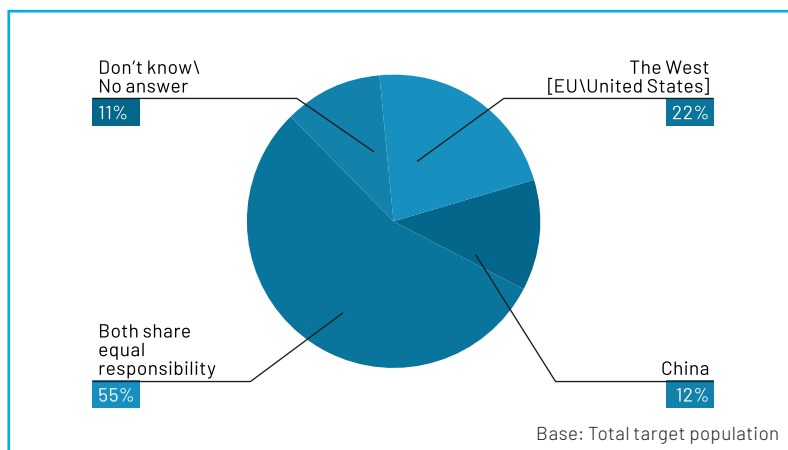
Eyeing the region, the other Western Balkan countries, with the exception of Serbia, also prefer national security alliances with the Western actors with some notable differences that need to be addressed. Kosovars place the US first (75.5%), followed by NATO (58.5%) and the EU/and or member states (48.4%). Even though a NATO member, Albania's support for the alliance in this respect comes third (38.2%), right after the US and the EU/and or member states whose support almost falls within the margin of error (41.7% vs 38.2%). Bosnia and Herzegovina is much more pro-EU in this sense with the EU scoring 14% higher than NATO (38.6% vs 24.6%). Unlike its neighbors, Serbia looks eastwards, preferring Russia and China as security providers (59.4% and 40.5% respectively) over its Western counterparts. Last, with 23% of the respondents not having a stance or refusing to answer, Macedonians are the least decided, so to speak, in terms of security alliances among their Western Balkan neighbors.

The EU, NATO, and the US all constitute the almost universally accepted notion of "the West" in a geopolitical sense. In the last years, the EU and NATO were more vocal in their rivalry with Russia as collective actors, than in their rivalry with China, where, even though a NATO member, the US stood out as an individual actor. In terms of whom to blame for the rivalry between the EU and NATO or the EU and United States, on the one hand, and Russia and China, on the other, the majority of the respondents in North Macedonia would blame them both but blame the West slightly more. Similar patterns are detected elsewhere in the region, with Albania and Kosovo being more critical of Russia/China, while Serbia being more critical of the West.

The main responsible for the rivalry between the West (EU\NATO) and Russia is...



The main responsible for the rivalry between the West (EU\United States) and China is...

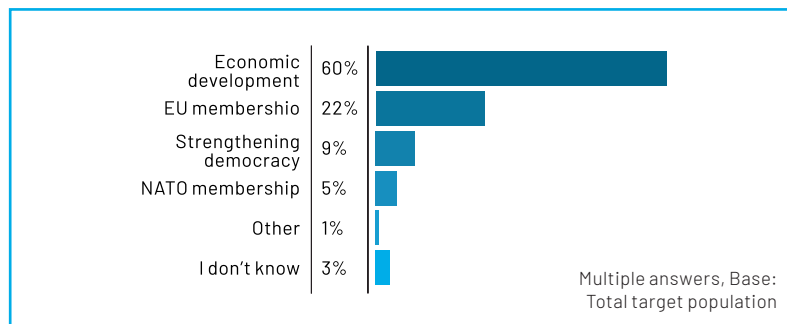


Essential developmental priorities

To measure the prospects, and success of European integration, it is essential to know about the priorities of prospective member states' citizens.

When it comes to priorities of the citizens of North Macedonia, the results are clear: economic development is the main priority of 60% of respondents, followed only by 22% who consider EU membership to be the main priority. These results harmonize with other studies that show that economic development is a main concern for a majority of Macedonians and that other aspects – such as democratization (9% in this poll) or rule of law – are subordinated to this goal.

In your personal view, what is the most important priority for North Macedonia?

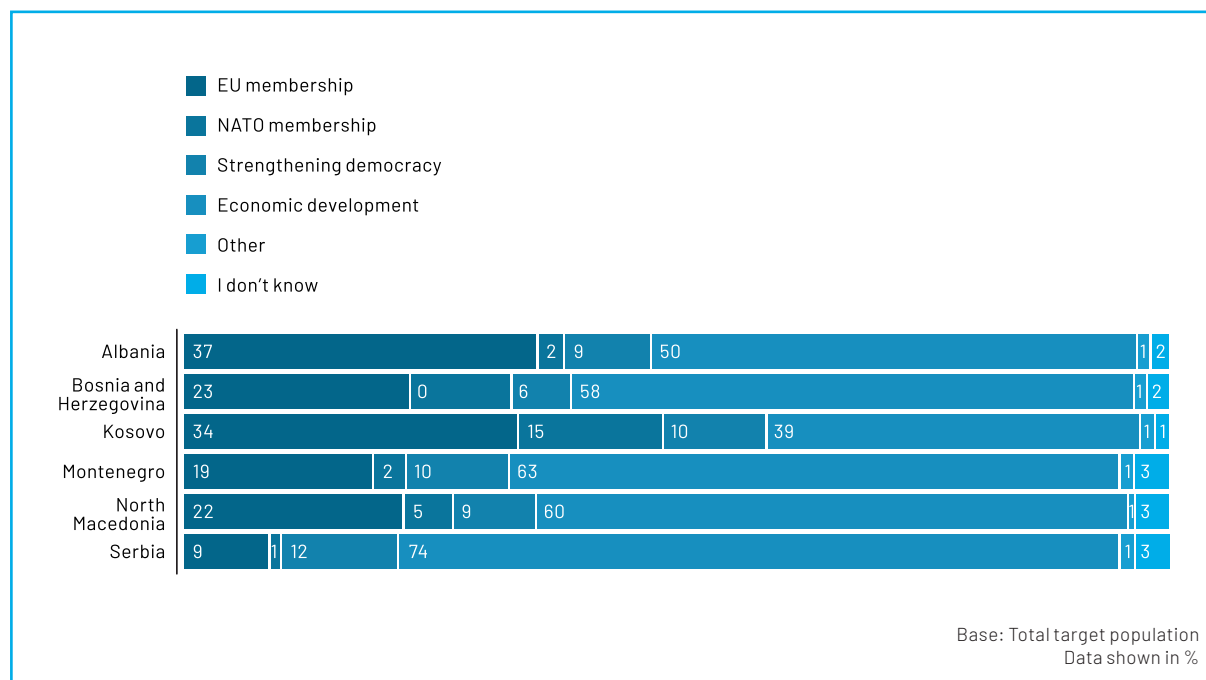


This shows a massive discrepancy with the EU priorities where rule of law and democratisation override every other policy, strategy or funding targeted at prospective candidates such as North Macedonia. The new Methodology for enlargement especially emphasizes the importance of rule of law and democratisation. Additionally, the BiEPAG opinion poll has shown that the benefits of EU membership are also understood by respondents as being mostly of economic nature, and not so much in terms of democratisation. This suggests that the transformative element of EU enlargement policy lags behind a rather transactional perception of it.

Macedonians do not stand out of the crowd with their focus on economic

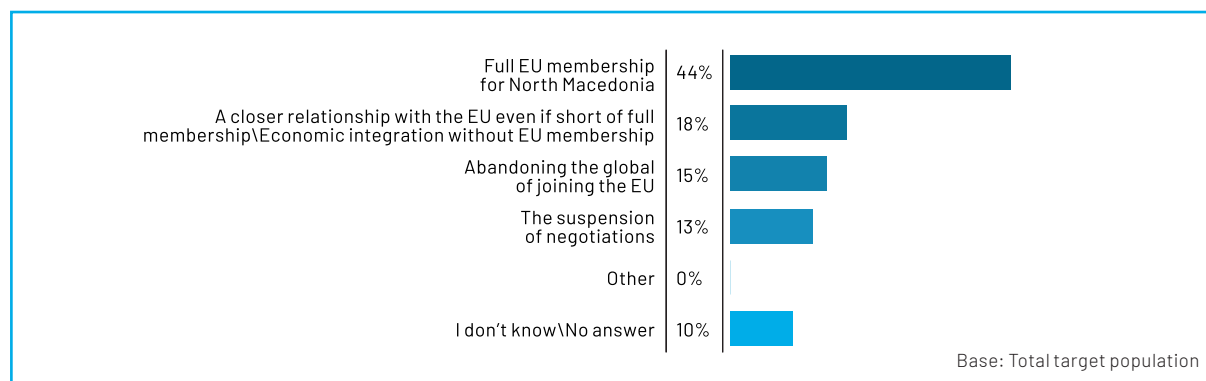
development, interestingly though only Montenegrinians and Serbians – the only countries already negotiating membership – choose economic development even more decisively over EU membership. “Strengthening democracy” is a concern only for a small minority for citizens anywhere, though in Serbia the group of people arguing to for democracy is slightly larger (12%) as those prioritizing EU membership (9%) above all other aspects.

In your personal view, what is the most important priority for [COUNTRY]?



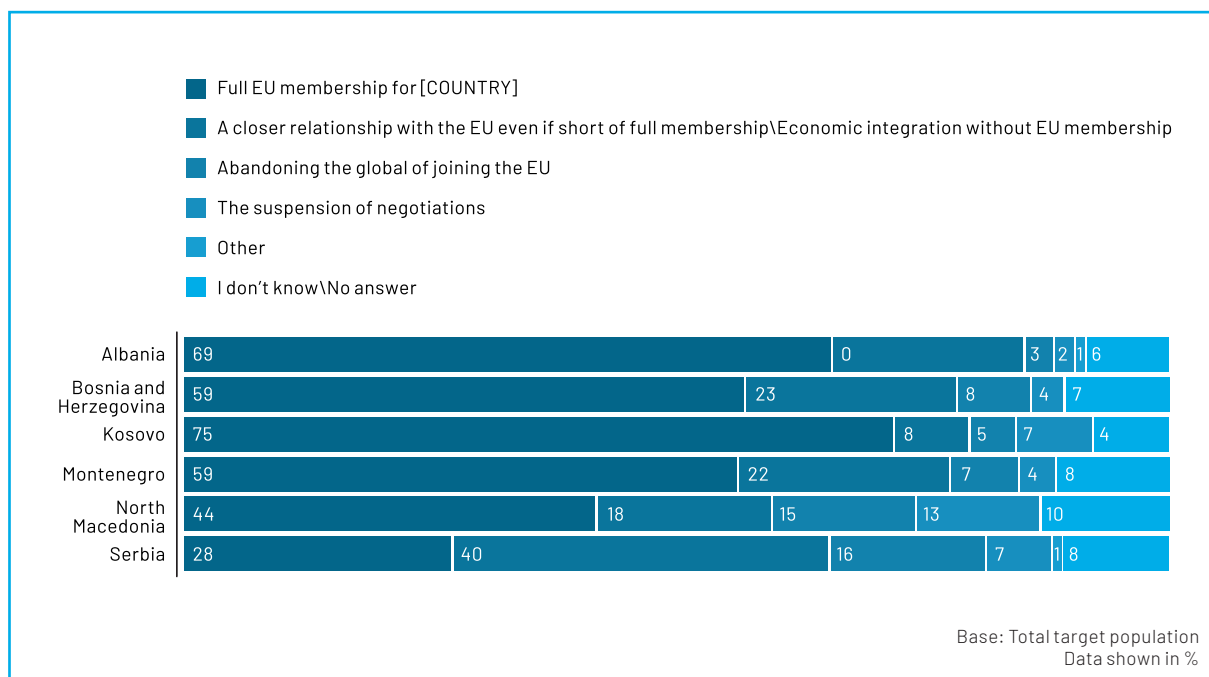
The lesson for the EU is clear: with economic development being a key concern for 60% of Macedonians and between 50% (Albania) and as much as 74% (Serbia) of citizens, this should be a key concern for the EU to deliver. However, the overall economic performance and wealth levels of a country has more lasting effects if paired with social and democratic reform, so quick money alone will not be the answer to problems.

Please indicate which of the following options you prefer:



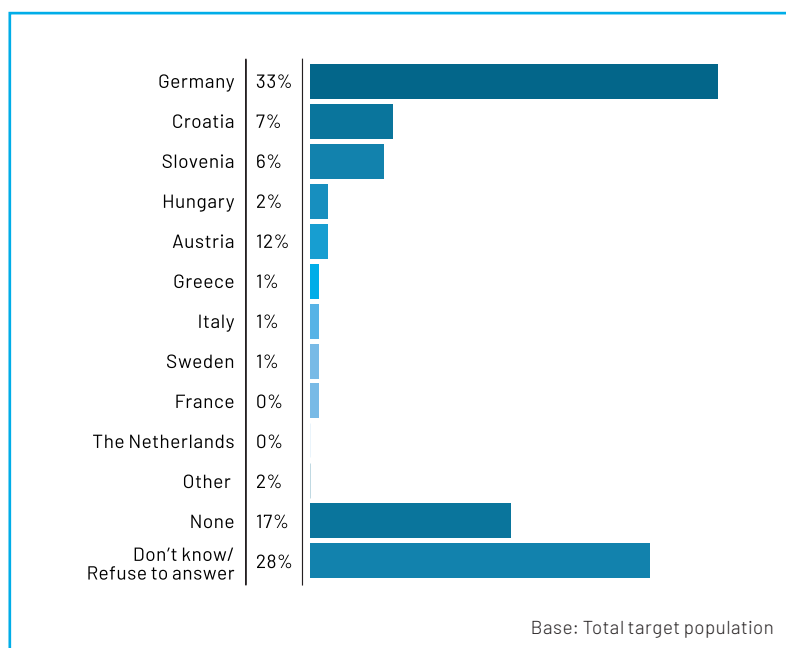
Looking further into developmental aspirations and European integration, the results of this poll show that full EU membership is not (anymore) the desired option for as many as 56% of respondents (with 10% choosing other and/or don't know). 18% prefer economic integration without EU membership – highlighting again the pragmatic approach focused on economic development of the country – and 28% propose at least a suspension of EU accession negotiations. Only in Serbia, even fewer respondents (28%) find the option of full membership less appealing and rather choose economic integration without EU membership. In all the other countries at least half of the citizens still wish for full EU membership as opposed to any of the other options provided.

Please indicate which of the following options you prefer:



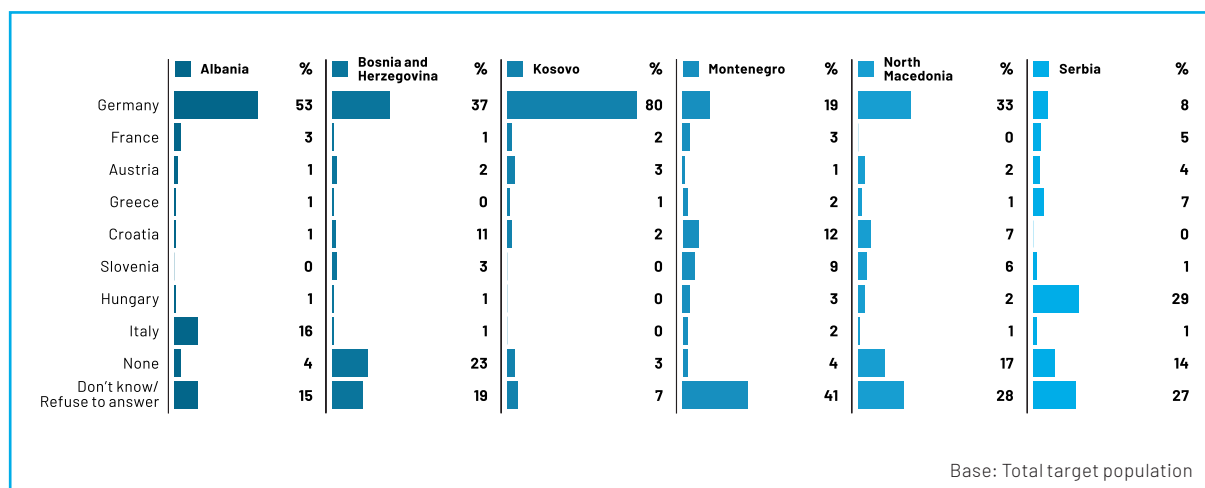
Seeing that Germany is still considered by 33% of Macedonian respondents to be the greatest supporter of the country, it should be hoped that the coming German government draws that connection and pushes for an ambitious European agenda to come. The recently published coalition agreement between SPD, FDP and the Green party highlights the importance for North Macedonia to gain negotiation status. Croatia and Slovenia are two EU states from the region who continuously put Western Balkan EU integration on the EU agenda. This is recognized by 7% (Croatia) and 6% (Slovenia) of Macedonian respondents.

Please indicate which of the following options you prefer:



Among the region, only Serbian respondents consider Hungary (29%) the most supportive of their EU membership. Germany is second with only 8%. This is of interest for the Macedonian case since the charts presented above have shown the orientation of Macedonians towards Serbia as a main supporter and partner in the Covid19 crisis.

Which state is most supportive of [COUNTRY]'s EU membership?



Main Takeaways

- Macedonians perceive Serbia, by far, as the most helpful actor during the Covid19 pandemic, nonetheless, the expectations of the European Union are increasing for continuous assistance during the health crisis.
- The strategic communication of both the government of North Macedonia and the EU must be strengthened and streamlined in order to do more in providing timely information when it comes to the assistance provided during the pandemic.
- High percentage of respondents believe that strongmen are needed in handling a crisis. In combination with those respondents that prefer authoritarian leadership this percentage rises to 54%.
- Economic development is the main priority for the majority of Macedonians.
- Democratisation and the rule of law are sidelined and are not the main concern, despite being the backbone of the EU's enlargement strategy towards the Western Balkan region.
- Only one fifth of Macedonians support full EU membership if other options to receive economic support are available. 28% favour the suspension or even abandonment of EU accession negotiations.
- It is essential for the EU to connect ambitious funding with a credible and coherent democratisation and rule of law agenda.
- Germany enjoys recognition as the most supportive of both North Macedonia in general, and its EU accession prospects specifically among a significant group of respondents.
- The majority of Macedonians would support North Macedonia's membership in NATO if the referendum were held again.
- The majority of the respondents firmly embed their beliefs for a security provider in the Western alliances, equally supporting the EU and NATO.
- In terms of whom to blame for the rivalry between the EU/NATO/United States, on the one hand, and Russia and China, on the other, the majority of respondents would blame them both but blame the West slightly more.

About us

The Balkans in Europe Policy Advisory Group (BiEPAG) is a joint initiative of the European Fund for the Balkans (EFB) and Centre for the Southeast European Studies of the University of Graz (CSEES) promoting the European integration of the Western Balkans and the consolidation of democratic, open countries in the region. BiEPAG is grounded in the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. It adheres to values that are common to a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail. It is composed of prominent policy researchers from the region and wider Europe with demonstrable comprehension of the Western Balkans and the processes shaping the region. Members are Florian Bieber, Matteo Bonomi, Dimitar Bechev, Srđan Cvijić, Marika Djolai, Milica Delević, Vedran Džihčić, Richard Grieveson, Donika Emini, Dejan Jović, Marko Kmezić, Srđan Majstorović, Zoran Nechev, Tena Prelec, Corina Stratulat, Nikolaos Tzifakis, Alida Vračić, Gjergj Vurmo, Jelena Vasiljević, Natasha Wunsch.

<https://biepag.eu>

The European Fund for the Balkans is a joint initiative of the Erste Foundation, Robert Bosch Foundation and King Baudouin Foundation that envisions and facilitates initiatives strengthening democracy, fostering European integration and affirming the role of the Western Balkans in addressing Europe's challenges. Its strategy is focused on three overarching areas – fostering democratisation, enhancing regional cooperation and boosting EU Integration.

The EFB supports the process of affirming the efficacy of EU enlargement policy across the Western Balkans, improving regional cooperation amongst civil society organisations based on solidarity and demand-driven dialogue. It provides means and platforms for informed and empowered citizens to take action demanding accountable institutions and democracy. The focus is on continuous reforms of the policies and practices of the Western Balkans countries on their way to EU accession.

www.balkanfund.org

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The Centre for Southeast European Studies was set up in November 2008 following the establishment of Southeast Europe as a strategic priority at the University of Graz in 2000. The Centre is an interdisciplinary and cross-faculty institution for research and education, with the goal to provide space for the rich teaching and research activities at the university on and with Southeast Europe and to promote interdisciplinary collaboration.

<http://csees.uni-graz.at/>

The Centre also aims to provide information and documentation and to be a point of contact for media and public interested in Southeast Europe, in terms of political, legal, economic and cultural developments. An interdisciplinary team of lawyers, historians, and political scientists has contributed to research on Southeast Europe, through articles, monographs and other publications. The centre regularly organizes international conferences and workshops to promote cutting edge research on Southeast Europe.

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