

SOCIO-POLITICAL OPINION RESEARCH REPORT

CONDUCTED BY
THE NATIONAL DEMOCRATIC INSTITUTE – NORTH MACEDONIA
AND TEAM INSTITUTE



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THIS RESEARCH REPORT WAS PREPARED BY THE NATIONAL DEMOCRATIC INSTITUTE – NORTH MACEDONIA (NDI) AND TEAM INSTITUTE. THE VIEWS EXPRESSED IN THIS REPORT DO NOT NECESSARILY REFLECT THE VIEWS OF NDI.

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I. RESEARCH METHODOLOGY

RESEARCH METHODOLOGY

QUANTITATIVE RESEARCH: SURVEY OF REPRESENTATIVE SAMPLE OF 1,212 RESPONDENTS

QUALITATIVE RESEARCH: 16 FOCUS GROUPS WITH UNDECIDED VOTERS

RESEARCH METHODOLOGY	QUANTITATIVE: Face to Face (F2F) Computer-Aided Personal Interviewing (CAPI)	QUALITATIVE: Focus Groups
Population	Citizens of the Republic of North Macedonia, aged 18 years and older	Undecided citizens of the Republic of North Macedonia, aged 18 years and older from 11 cities
Sample Design	Nationally representative, multistage stratified sample of 1,212 respondents aged 18+. Households are distributed proportionally in urban and rural areas and by ethnicity in all eight regions of the country.	Undecided voters, with balances of gender, age, education, working status and nationality
Sample Size	1,212 respondents Estimated Margin of Error of ± 2.81 percentage points at the 95% Level of Confidence	16 focus groups 131 participants in total Average of eight participants per group
Time Frame	February 26 to March 5, 2020	February 7 to 28, 2020
Research Team	Interviewer network of 45 interviewers and ten regional supervisors	Three moderators Five transcribers 20 recruiters
Average Length of Interview / Focus Group	25 minutes	120 minutes

QUALITATIVE RESEARCH METHODOLOGY

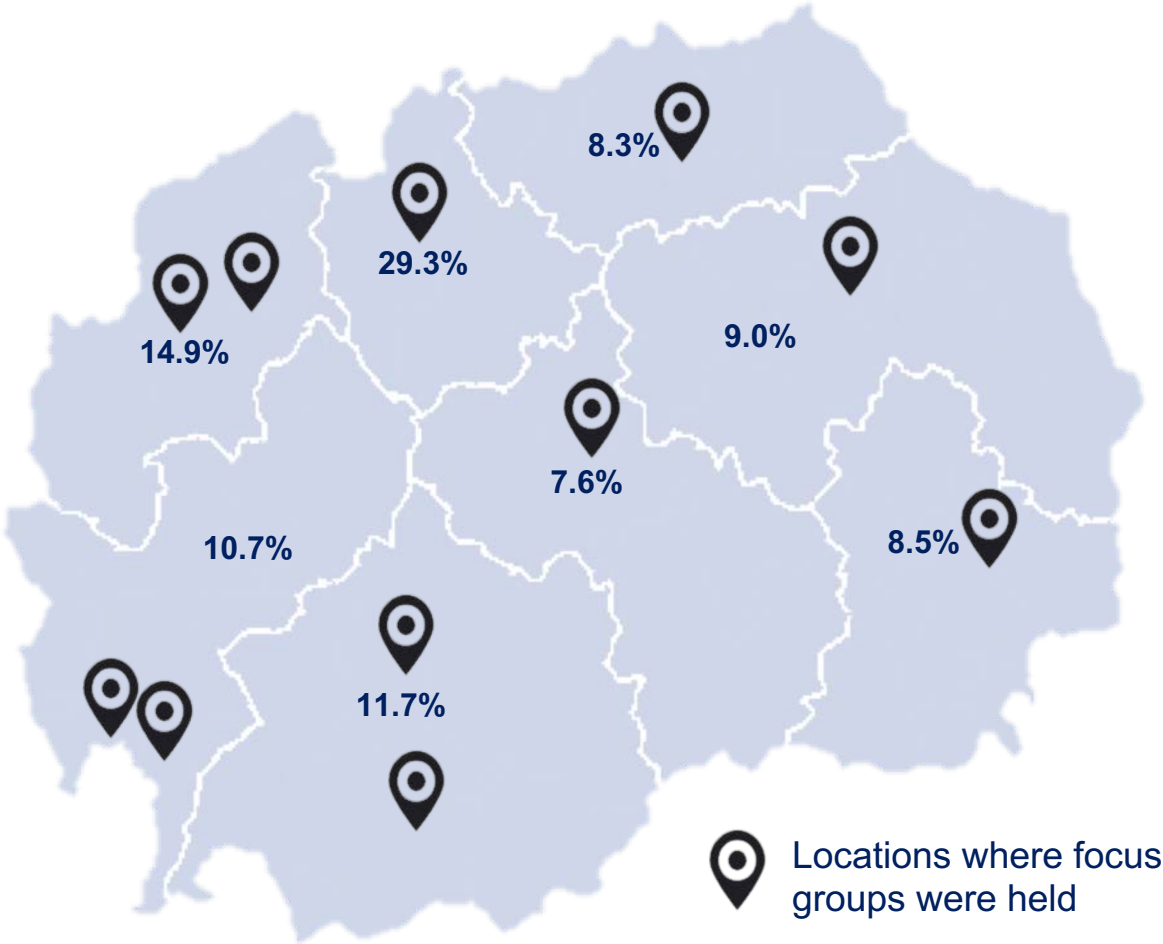
- The purpose of qualitative research is to understand the thoughts and experiences of participants, and to identify reasons for their perceptions, beliefs and behaviors.
- During the recruiting process, participants received an explanation about the nature and the goals of the research, so they could have a clear understanding of the topics, as well as what would be expected from them.
- A recruitment questionnaire was used to select the undecided voters for each focus group.
- The anonymity and protection of personal data was guaranteed to all participants. In addition, all participants signed a consent form to participate in the focus groups and to allow research data to be published, without revealing their personal data.
- NDI representatives observed all 16 focus groups.
- The results of this qualitative study should be taken as broad indicators regarding the views and behaviors of the participants in these group discussions and should not be taken as representative of the attitudes and opinions of all undecided citizens of the Republic of North Macedonia.

- ✓ **January 3:** A new *technical* government was formed for the purposes of the early parliamentary elections in April; ministers and deputy ministers from the opposition are participating in this government.
- ✓ **February 11:** The Assembly ratified the protocol for joining NATO.
- ✓ **February 15:** The Assembly dismissed the technical minister Rashela Mizrahi from the function Minister of Labor and Social Policy due to breaching the Constitution on the usage of the new name of the country.
- ✓ **February 15:** The Assembly passed the new Law on Public Prosecutors and dissolved the same day after adopting a Decision for calling early parliamentary elections in April 2020.
- ✓ **February 21:** The Alliance for Albanians signed a coalition with Alternativa.
- ✓ **Throughout February:** The opposition released new audio recordings (“bombs”) on alleged interference of Zoran Zaev in the judiciary system; after this, several recordings were released on alleged links of a high political figure in VMRO-DPMNE, Antonio Miloshoski, with Supreme Court judges and services he demanded from them.
- ✓ **February 26:** The first case of an infected person with Corona virus in North Macedonia was revealed.
- ✓ **February 28:** The Social Democratic Union of Macedonia (SDSM) signed a pre-election coalition with Besa movement.
- ✓ **March 2:** The European Commission issued its mini report on the progress of the Republic of North Macedonia and gave a recommendation for starting the EU negotiations before the European Council Summit on EU – Western Balkans, scheduled for March 26, 2020 in Zagreb.

II. DEMOGRAPHICS OF RESPONDENTS

DEMOGRAPHICS OF RESPONDENTS

Survey Distribution by Region

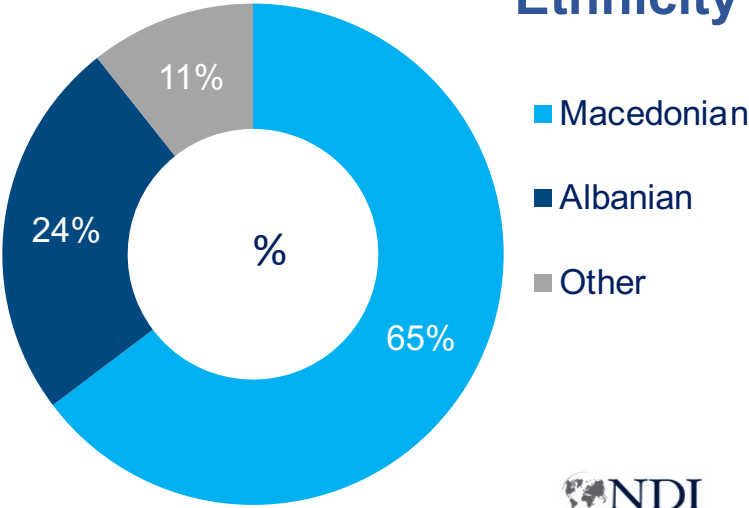


Urban 58%



Rural 42%

Ethnicity

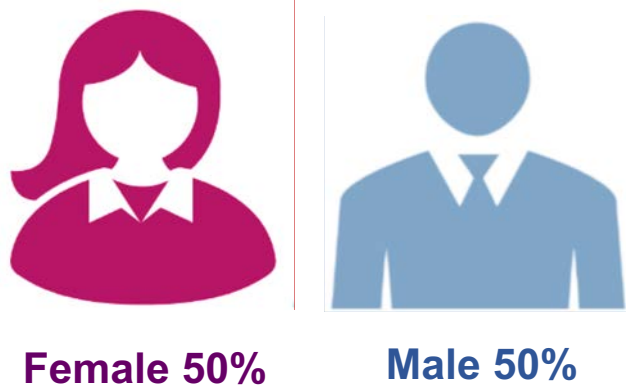


FOCUS GROUPS OF UNDECIDED VOTERS AGE 18+

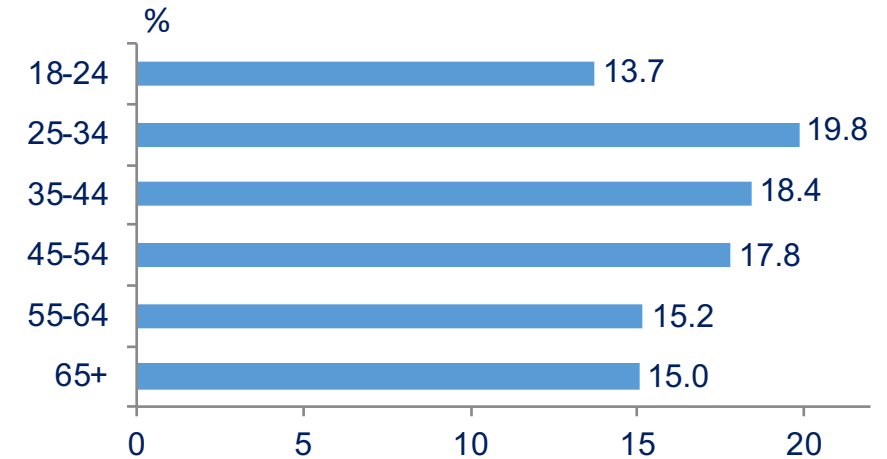
Date	City	Ethnicity	Additional Criteria
07.02.2020	Tetovo	Albanian	
08.02.2020	Shtip	Macedonians + Others	
11.02.2020	Skopje	Macedonian	
12.02.2020	Kumanovo	All	
13.02.2020	Skopje	Albanian	
15.02.2020	Struga	Macedonians + Albanians	
15.02.2020	Ohrid	Macedonian	
18.02.2020	Gostivar	All	
21.02.2020	Skopje	Macedonians + Albanians	Disaffected participants of the “Colorful Revolution”
22.02.2020	Prilep	Macedonian	Disaffected VMRO-DPMNE voters
22.02.2020	Bitola	Macedonian	
23.02.2020	Strumica	Macedonian	
22.02.2020	Veles	Macedonian	
26.02.2020	Shtip	Macedonian + Others	Young people, ages 18 to 29
27.02.2020	Tetovo	Albanians	Young people, ages 18 to 29
28.02.2020	Skopje	All	Young people, ages 18 to 29

DEMOGRAPHICS OF RESPONDENTS

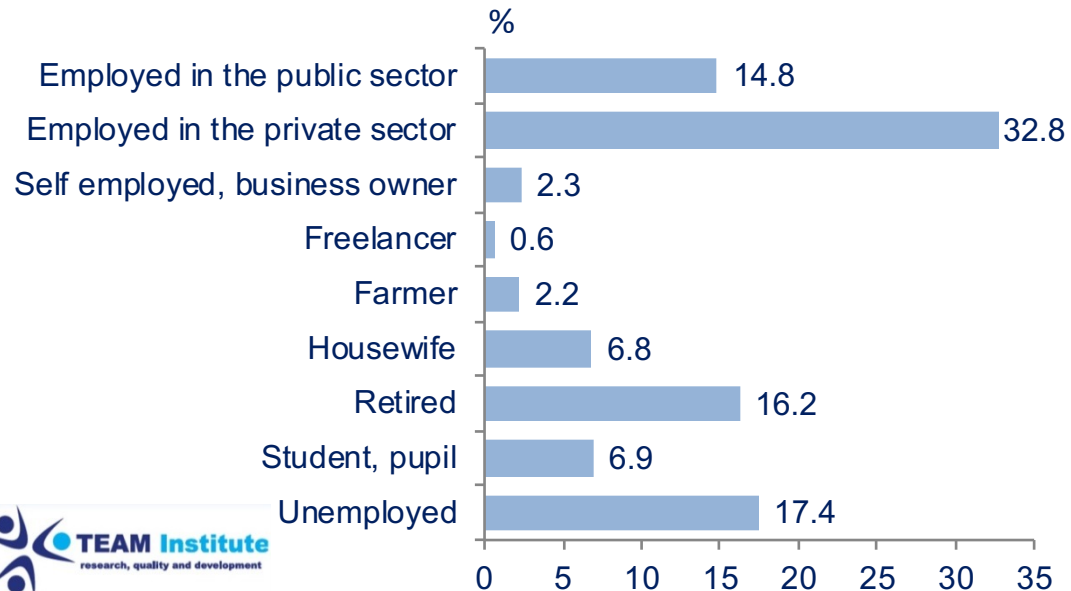
Gender



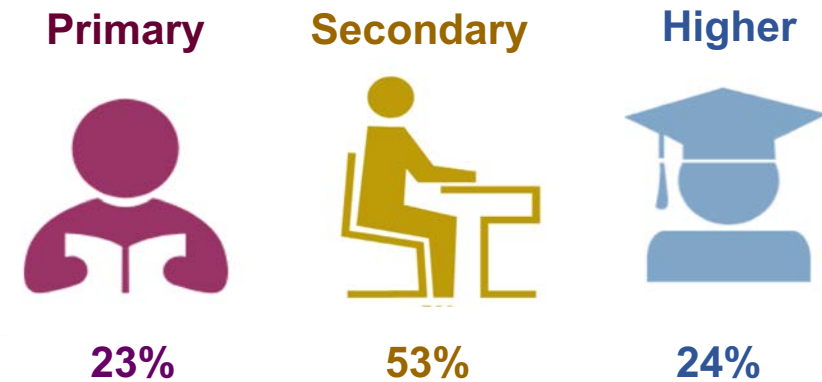
Age groups



Working status



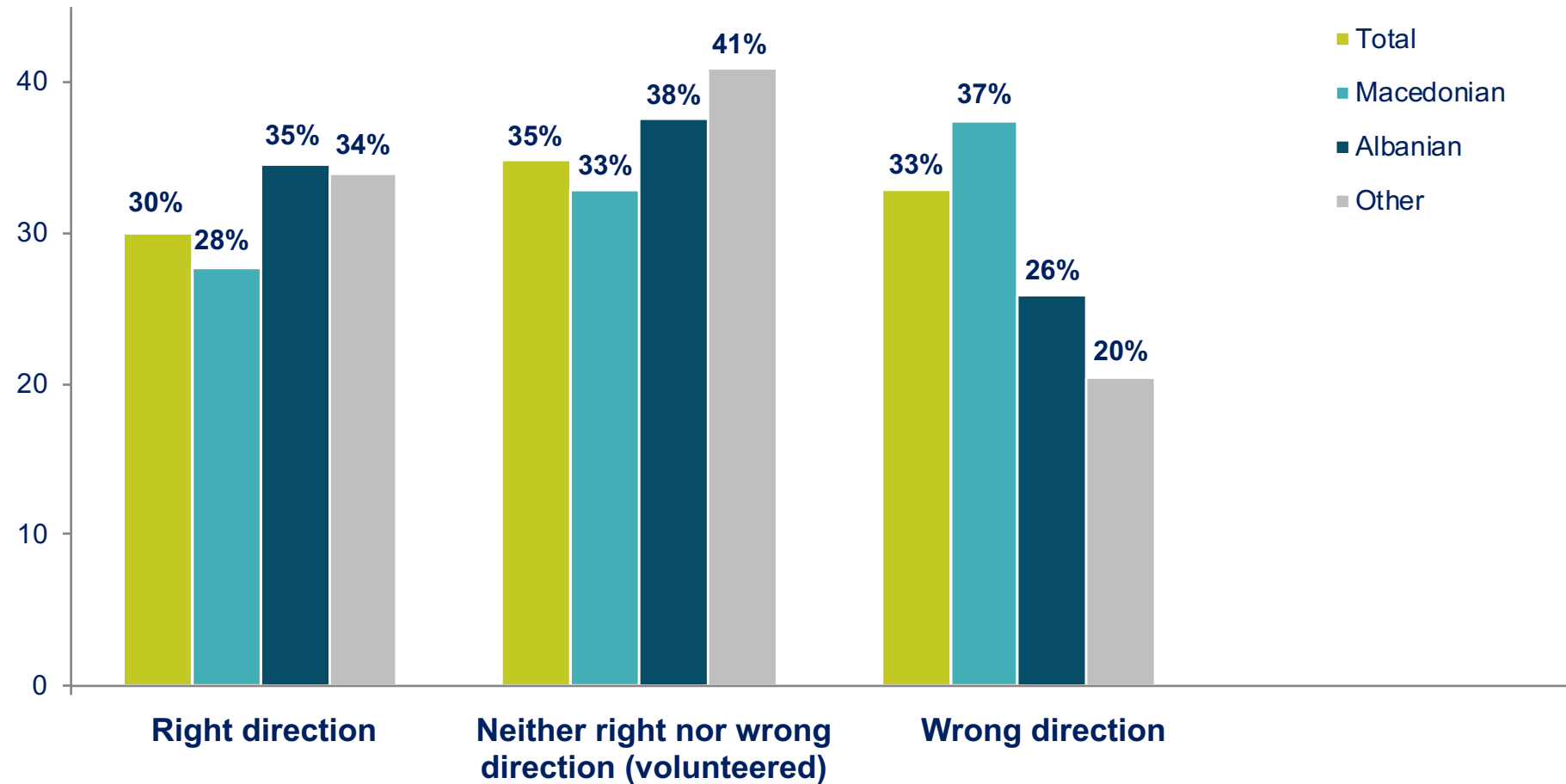
Education



III. GENERAL OUTLOOK

GENERAL OUTLOOK

Overall, is the country moving in the right or wrong direction?



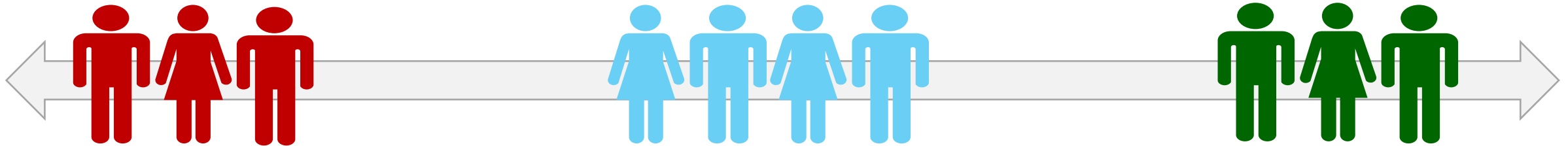
Base: 1212 (all respondents)
Margin of Error ± 2.8

Direction of the country

WRONG

NEITHER RIGHT NOR
WRONG

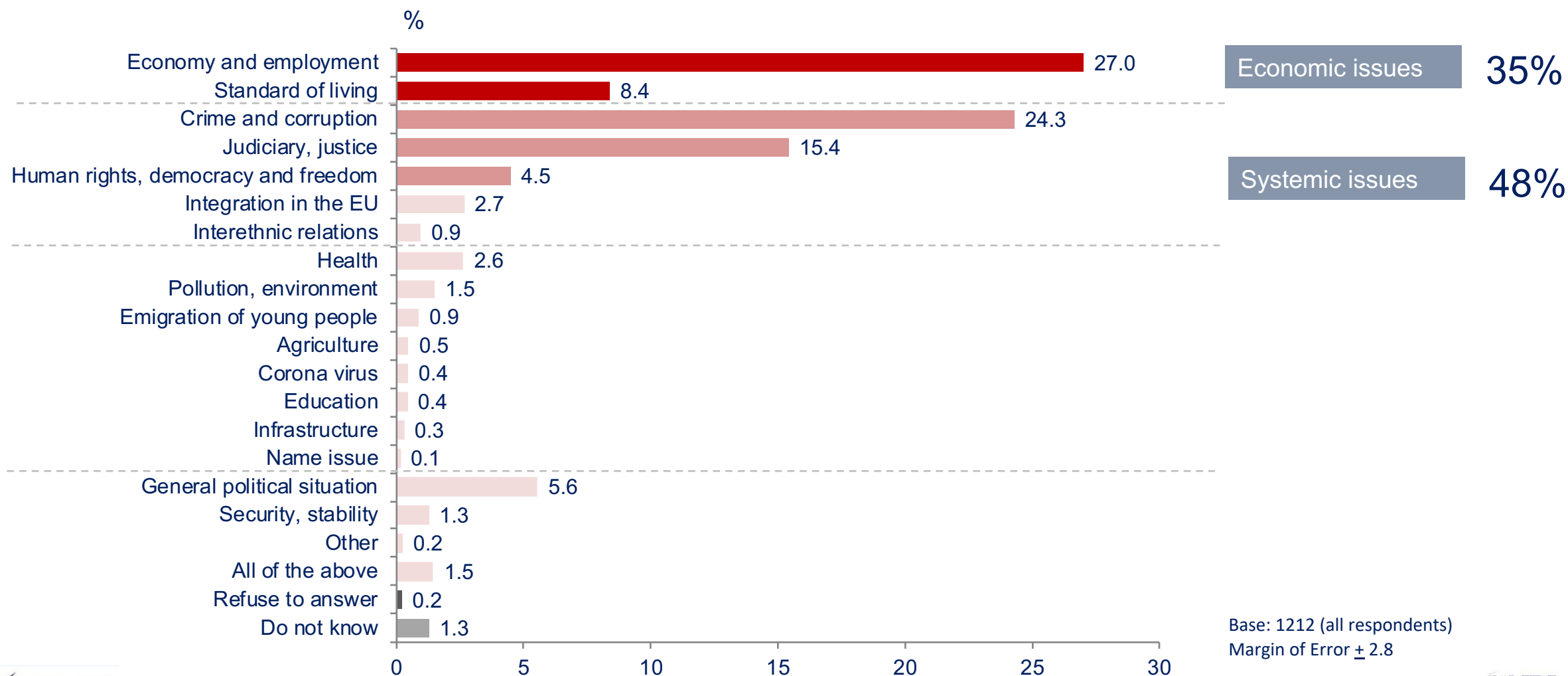
RIGHT



- Directionally, one in three is optimistic and one in three sees things headed in the wrong direction.
- However, a plurality see *no progress*.

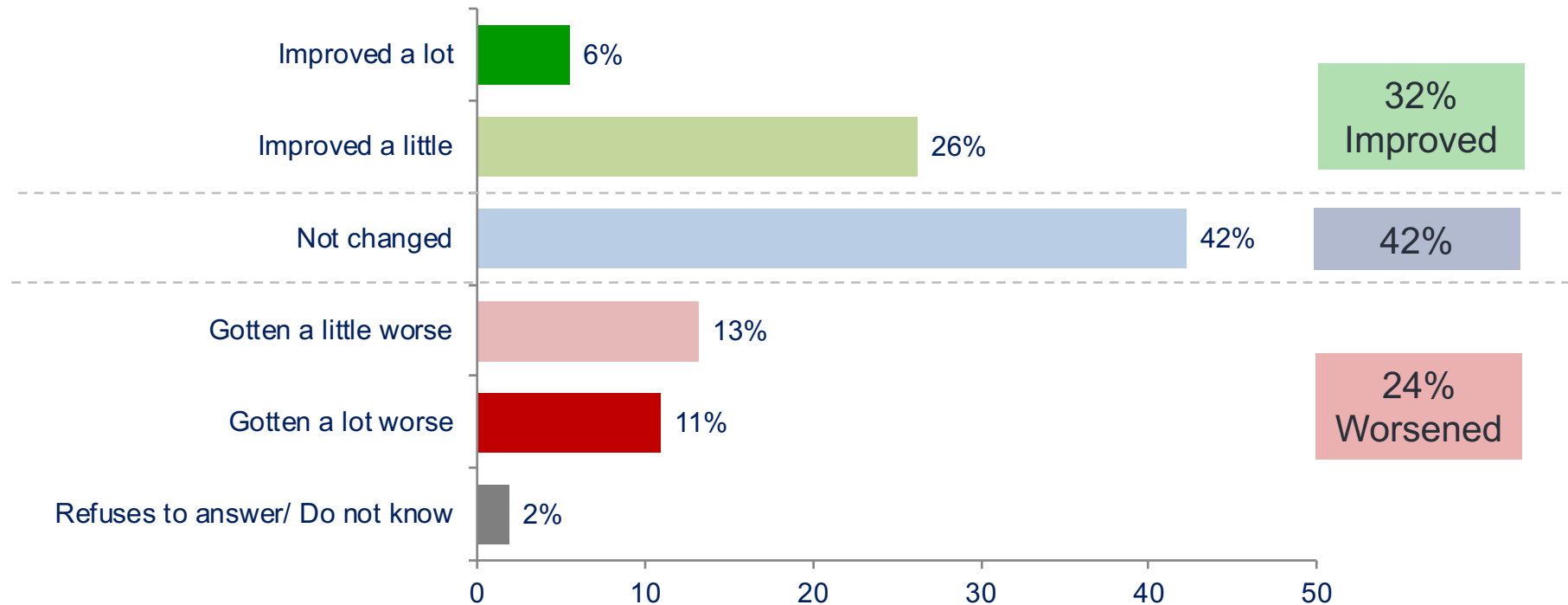
TOP ISSUE

In your opinion, what is the most serious problem facing the country today?



CURRENT SITUATION, AS COMPARED TO 2017

Thinking about the past three years, do you think people's lives in our country have...?



Base: 1212 (all respondents)
Margin of Error ± 2.8

CURRENT SITUATION, AS COMPARED TO 2017

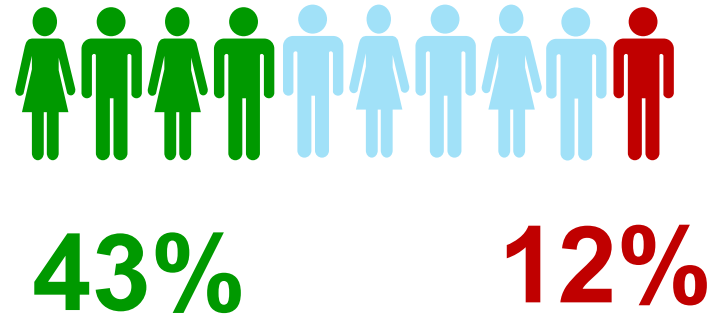
Thinking about the past three years, do you think people's lives in our country have...?

AMONG ETHNIC MACEDONIANS



Base: 787

AMONG ETHNIC ALBANIANS

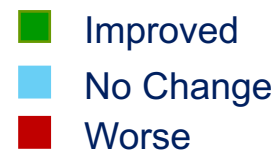


Base: 298

AMONG OTHER ETHNICITIES

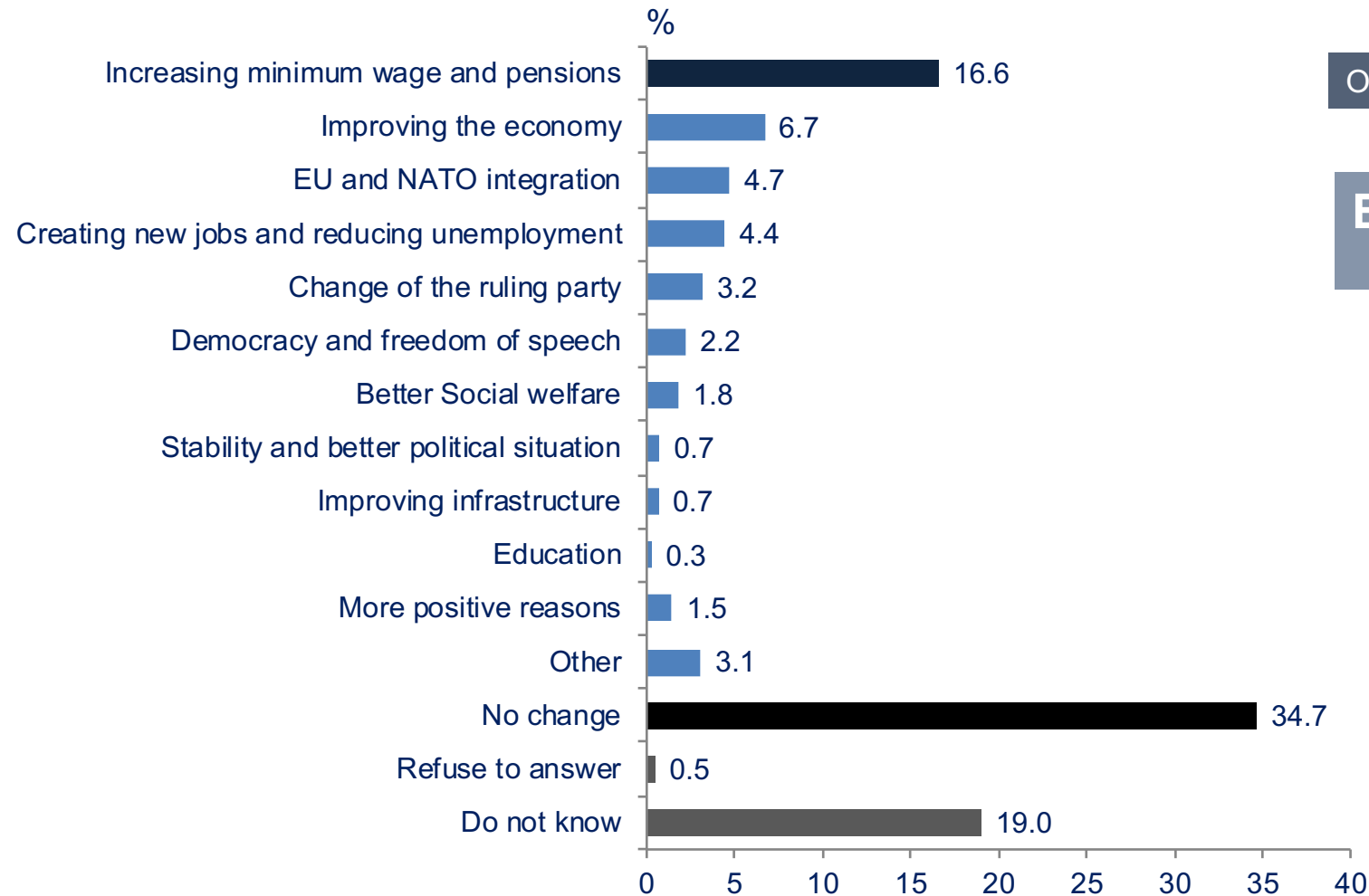


Base: 127



TOP REASON FOR IMPROVEMENT

What do you think is the top reason people's lives have improved?



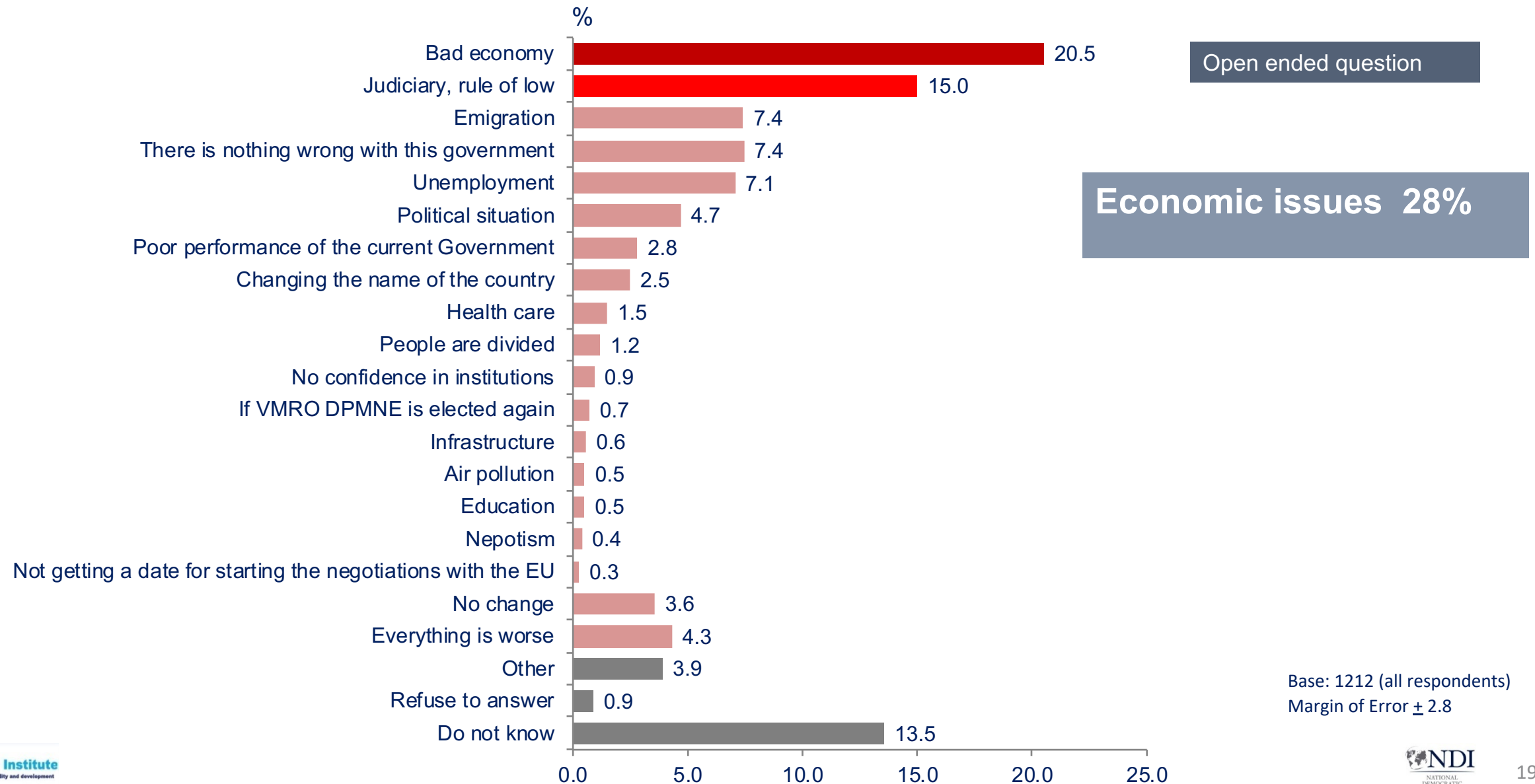
Open ended question

Economic issues 28%

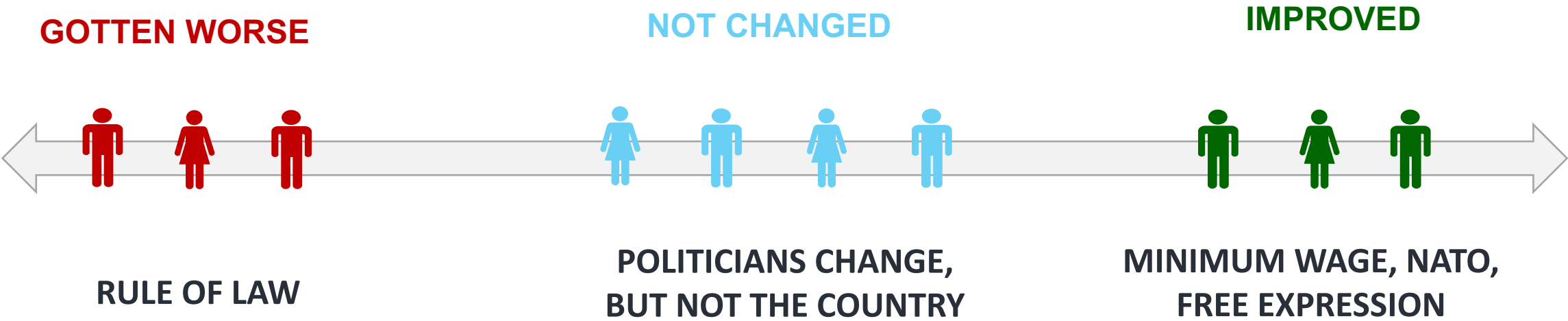
Base: 1212 (all respondents)
Margin of Error ± 2.8

TOP REASONS FOR GETTING WORSE

What do you think is the top reason people's lives have gotten worse?



REASONS THINGS HAVE...



Undecided citizens mostly oppose having elections

Early parliamentary elections are:

- Wasteful
- Creates divisions
- Only benefits politicians



The undecided voters are:

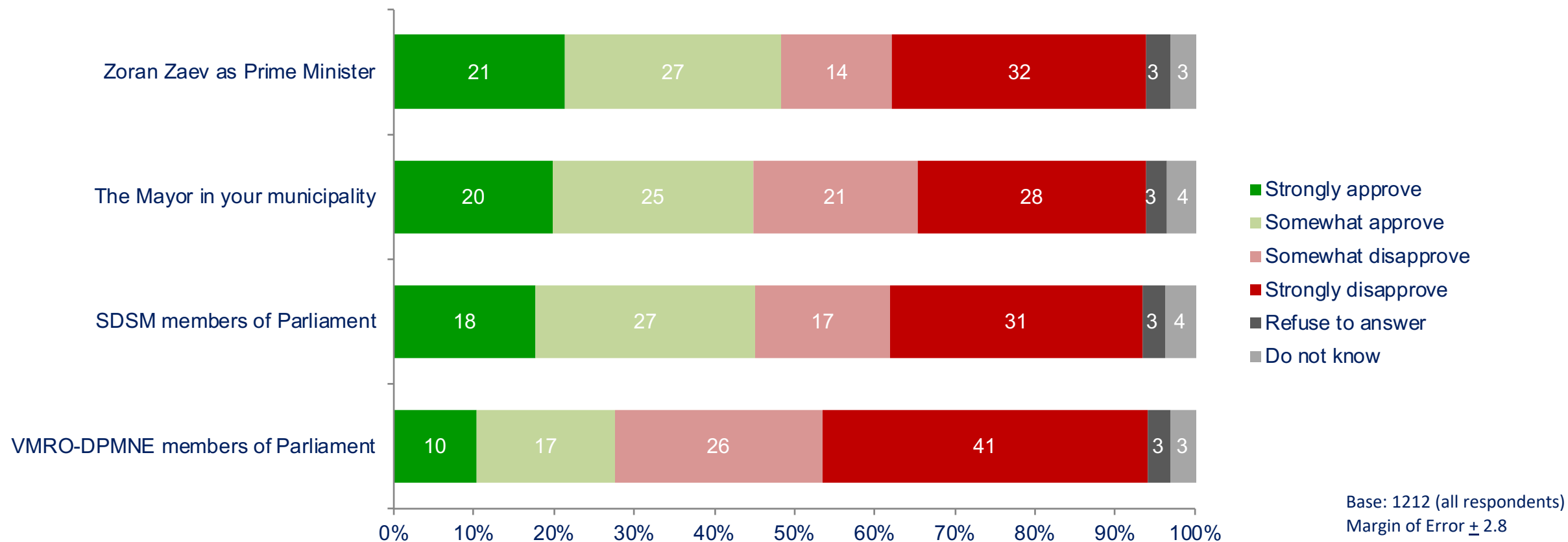
- Disappointed, apathetic and dissatisfied
- Hopeless in terms of expecting forthcoming significant positive change in the society

*Only a small portion of the participants felt that these elections are a critical point for the future direction of the society/country.

IV. INSTITUTIONAL TRUST AND JOB APPROVAL

JOB APPROVAL

Please tell me whether you approve or disapprove of their overall performance?



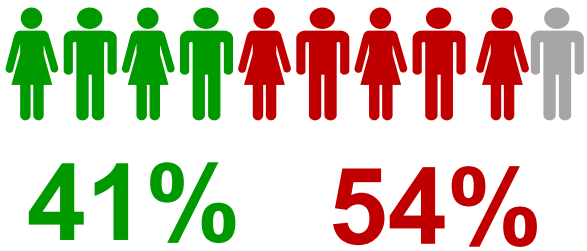
JOB APPROVAL

Please tell me whether you approve or disapprove of their overall performance?

Zoran Zaev as
Prime Minister

- Approve
- Disapprove
- Do not know/
refuse to answer

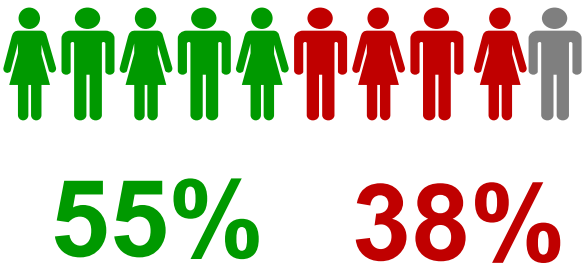
AMONG ETHNIC
MACEDONIANS



AMONG ETHNIC
ALBANIANS



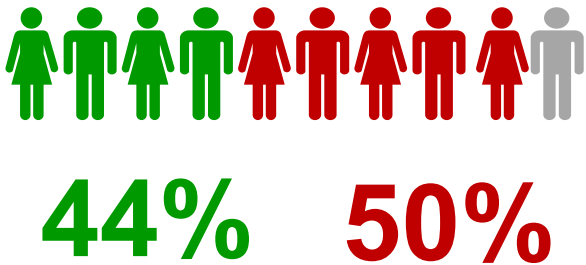
AMONG
OTHER ETHNICITIES



The mayor in
your municipality

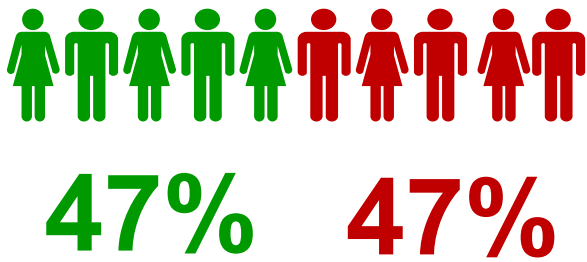
- Approve
- Disapprove
- Do not know/
refuse to answer

AMONG ETHNIC
MACEDONIANS



Base: 787

AMONG ETHNIC
ALBANIANS



Base: 298

AMONG
OTHER ETHNICITIES



Base: 127

JOB APPROVAL

Please tell me whether you approve or disapprove of their overall performance?

VMRO-DPMNE
Members of
Parliament

- Approve
- Disapprove
- Do not know/
refuse to answer

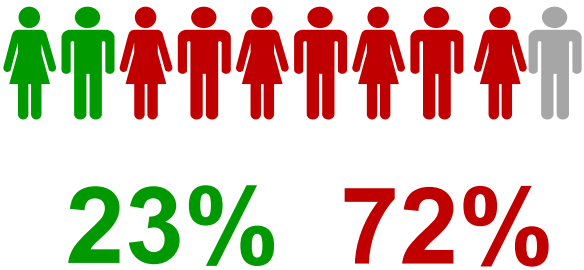
AMONG ETHNIC
MACEDONIANS



AMONG ETHNIC
ALBANIANS



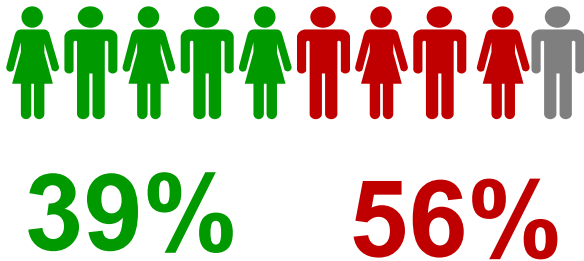
AMONG
OTHER ETHNICITIES



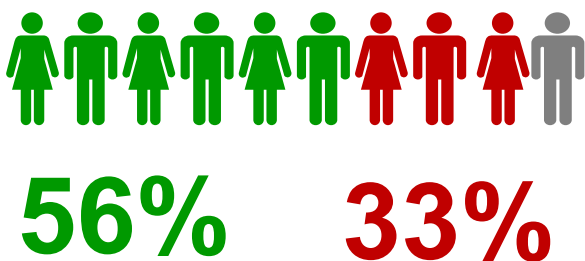
SDSM Members
of Parliament

- Approve
- Disapprove
- Do not know/
refuse to answer

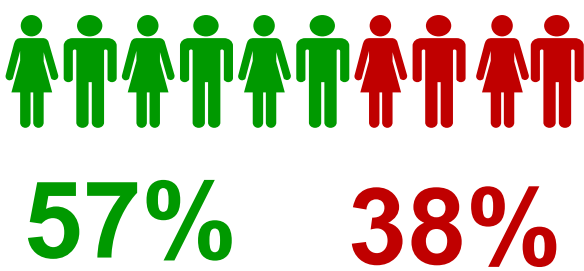
AMONG ETHNIC
MACEDONIANS



AMONG ETHNIC
ALBANIANS



AMONG
OTHER ETHNICITIES



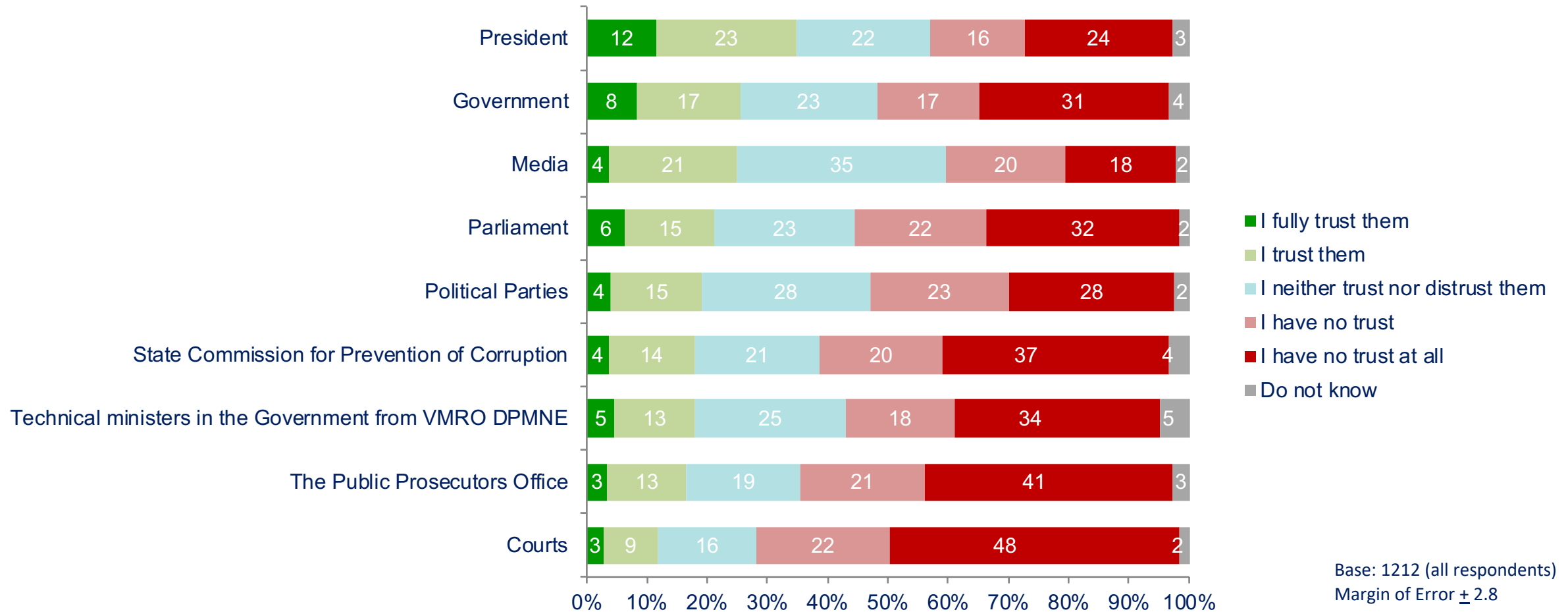
Base: 787

Base: 298

Base: 127

INSTITUTIONAL TRUST

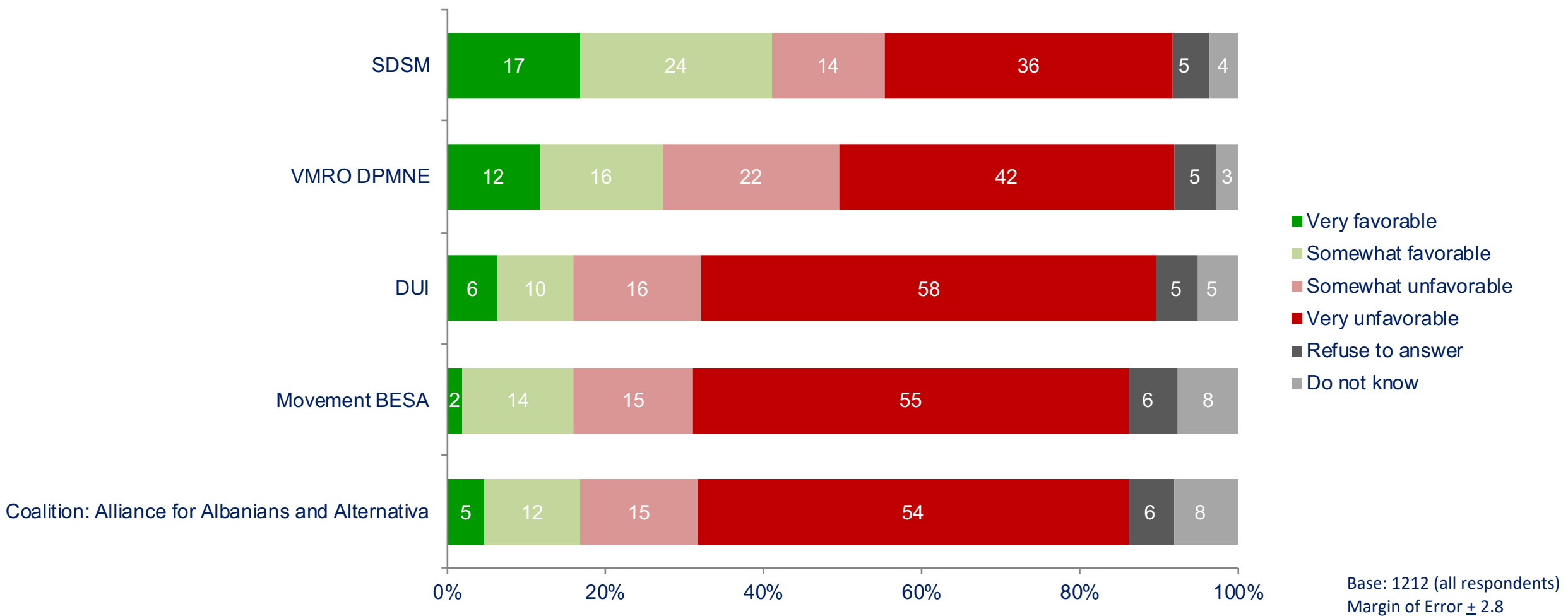
To what degree do you trust or not trust the following?



V. FAVORABILITY AND PERCEPTIONS OF POLITICAL PARTIES AND LEADERS

FAVORABILITY OF POLITICAL PARTIES

Please tell me if you have a very favorable view, somewhat favorable view, somewhat unfavorable view or very unfavorable view of each political party.



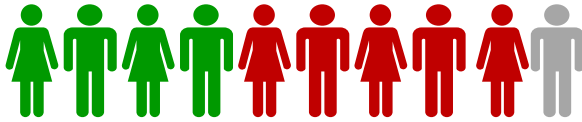
FAVORABILITY OF POLITICAL PARTIES

Please tell me if you have a very favorable view, somewhat favorable view, somewhat unfavorable view or very unfavorable view of each political party.



■ Favorable
■ Unfavorable
■ Refuse/ Do not know

AMONG ETHNIC MACEDONIANS



37% 57%

AMONG ETHNIC ALBANIANS



7% 82%

AMONG OTHER ETHNICITIES



18% 73%



■ Favorable
■ Unfavorable
■ Refuse/ Do not know

AMONG ETHNIC MACEDONIANS



36% 57%

AMONG ETHNIC ALBANIANS



49% 41%

AMONG OTHER ETHNICITIES



52% 36%

Base: 787

Base: 298

Base: 127

FAVORABILITY OF POLITICAL PARTIES

Please tell me if you have a very favorable view, somewhat favorable view, somewhat unfavorable view or very unfavorable view of each political party.



- Favorable
- Unfavorable
- Refuse/ Do not know

AMONG ETHNIC
MACEDONIANS



8% 83%

AMONG ETHNIC
ALBANIANS



37% 54%

AMONG
OTHER ETHNICITIES



19% 65%



- Favorable
- Unfavorable
- Refuse/ Do not know

AMONG ETHNIC
MACEDONIANS



6% 79%

AMONG ETHNIC
ALBANIANS



45% 46%

AMONG
OTHER ETHNICITIES



16% 62%



- Favorable
- Unfavorable
- Refuse/ Do not know

AMONG ETHNIC
MACEDONIANS



9% 77%

AMONG ETHNIC
ALBANIANS



30% 60%

AMONG
OTHER ETHNICITIES



28% 50%

Base: 787

Base: 298

Base: 127



WHAT DID THEY DO RIGHT?

MOVEMENT TO WEST, INCLUSIVE

- Clear pro-Western orientation / steps for approaching NATO and EU
- Minimum wage increase
- Helped socially vulnerable groups
- Greater freedom of expression and speech
- Transparency and easier access to information
- Better interethnic relations



WHAT DISSAPPOINTED YOU THE MOST?

FAILED ON PROMISED RULE OF LAW CHANGE, CORRUPT AS OTHER PARTIES

- Unsuccessful realization of the internal reforms
- No judiciary closures
- Unfulfilled promises, “money counter” and “you’ll do your time”
- Continuing with crime and corruption
- Nepotism and political employment
- Forcing the Referendum and the change of the Constitution
- Impulsive decisions
- Chaos, anarchy
- Protected Democratic Union for Integration (DUI) criminals
- Changing the Law on Smoking

SDCM



WHAT DID THEY DO RIGHT?

DISCIPLINED, YOUTH INVESTMENT

- Foreign investments
- Employment
- Consistency in implementing the decisions
- Order and control in their work
- Projects for young people / stimulations for students
- Construction of sports facilities
- The Law on Smoking



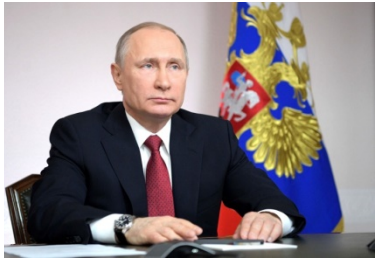
WHAT DISSAPPOINTED YOU THE MOST?

DIVISIVE, TOO NARROWLY FOCUSED

- Too much politics in everything
- Crime and corruption, collapse after 2011
- Arrogance, aggression, brutality
- Nationalism, interethnic conflicts and tensions between citizens
- Neglecting Euro-Atlantic integration
- Absence of clear attitude about important issues (name change, referendum, entering NATO)
- Not pro-West



Ideal world politician



Vladimir Putin

- Power, authority, firm fist
- Law and order, safety
- He protects the interests of his state
- He loves his people
- He knows what he wants, he has a plan
- A man of action, consistent
- He tries to avoid wars; not a provocateur

*popular especially among the Macedonian participants



Justin Trudeau

- Young
- Virtuous, takes responsibility
- Leads with good social politics
- Takes care of minorities
- Peace-loving



Angela Merkel

- Authority
- Attitude, determination, accuracy
- Modest
- Economy, employment,



Barack Obama

- Progressive attitude
- Close to the people
- Breaks stereotypes
- Preaches coexistence and cooperation



Recep Tayyip Erdoğan

- Power, authority
- Sacrifices for his people
- Developed the economy
- Made Turkey a powerful country



Albin Kurti

- Authoritative
- Competent, know-how
- Idealist
- Fulfills his promises

*Popular especially among the Albanian participants

Others frequently mentioned:

- Sebastian Kurz
- Bernie Sanders
- Theresa May
- Sanna Marin
- Kofi Annan
- Nelson Mandela

FAVORABILITY OF PARTY LEADERS

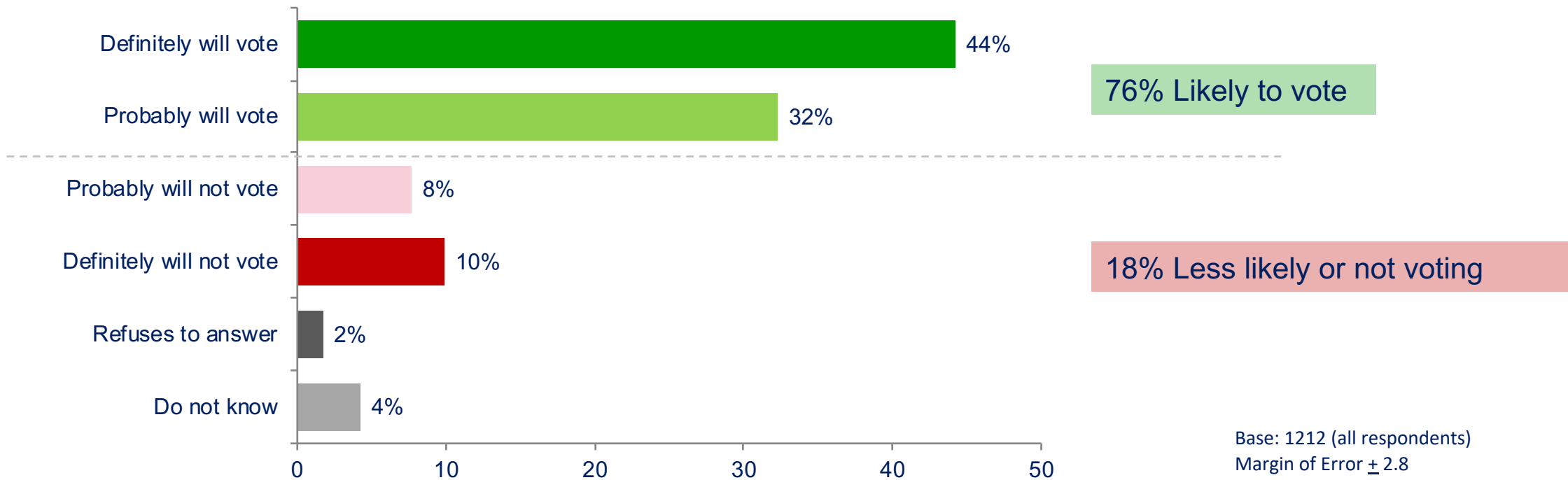
Please tell me if you have a very favorable view, somewhat favorable view, somewhat unfavorable view or very unfavorable view of that person.



VI. PARLIAMENTARY ELECTIONS AND ELECTORAL ATTRIBUTES

LIKELIHOOD OF VOTING

How likely are you to vote in the parliamentary elections on April 12, 2020?



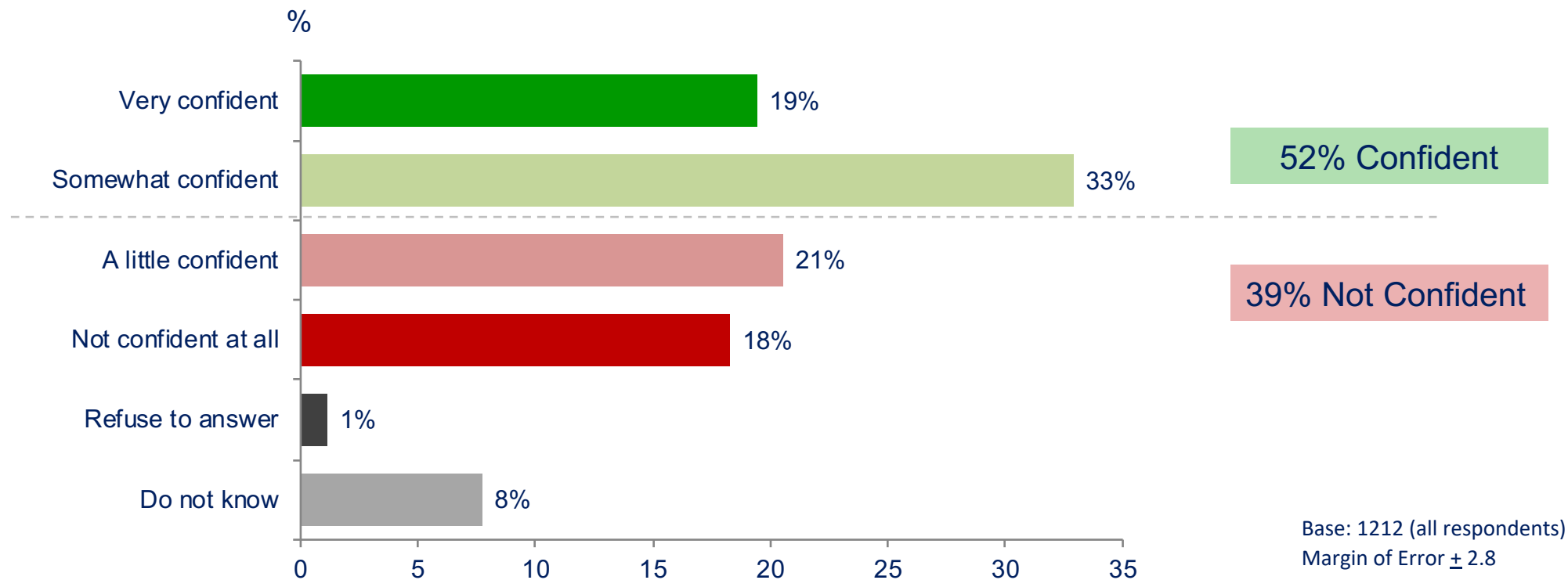
LOW TURNOUT AMONG UNDECIDED VOTERS

- ✓ The number of people who will vote will be low
- ✓ High number of invalid ballots
- ✓ High number of undetermined citizens who will not know what to do until the very end
- ✓ Fierce fight among the political parties in which they will use all means to get the undetermined voters
- ✓ Uncertain result until the very end about who will win and form the government



CONFIDENCE IN THE ELECTION SYSTEM

How confident are you that the April parliamentary elections will be conducted free and fairly?



HISTORY OF POLITICAL PRESSURE

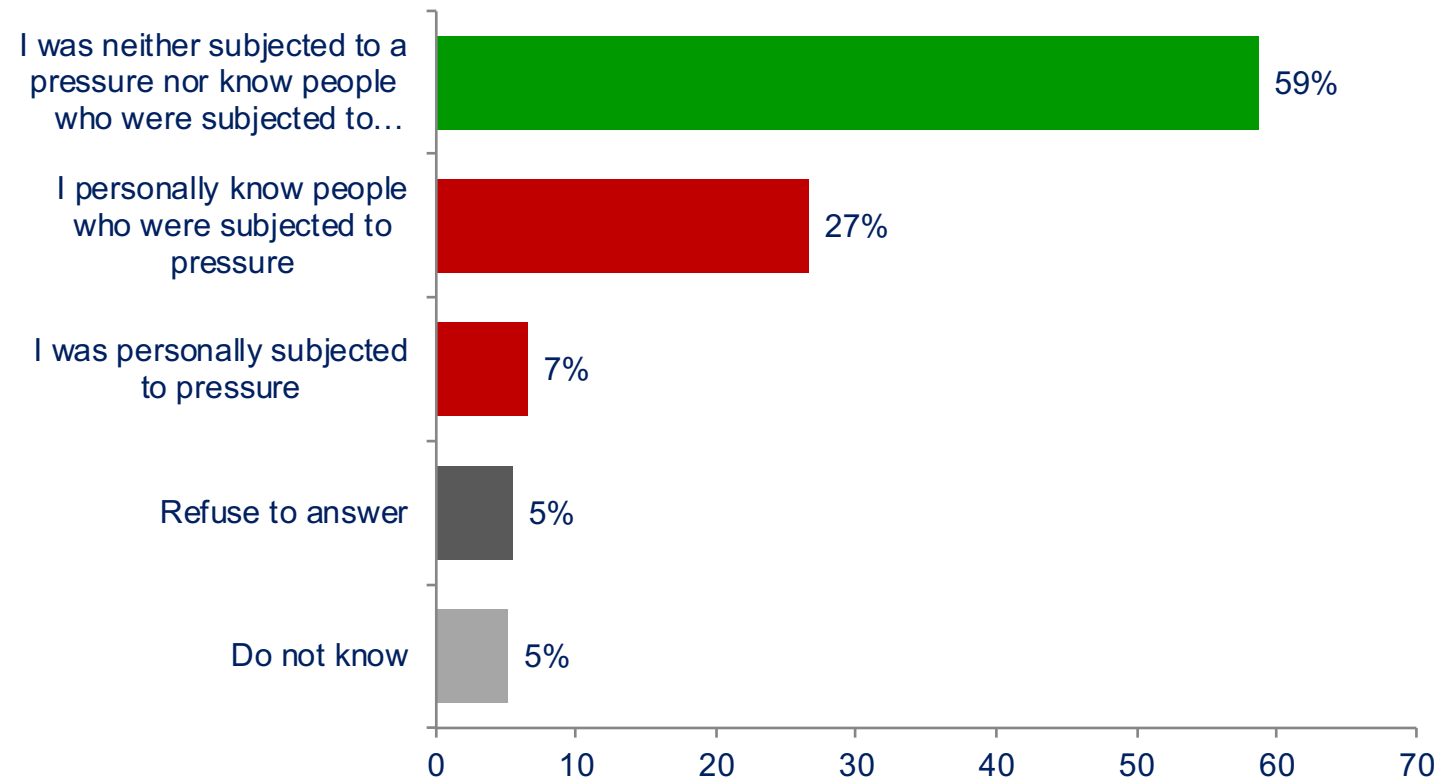
Have you, a member of your family, a relative or someone you personally know ever been subjected to pressure such as force, threats, vote-buying or other illegal means, to vote in a particular way?

EXPOSED TO PRESSURE
(Know someone or personally pressured)



31%

Base: 1212 (all respondents)
Margin of Error ± 2.8



Technique: unfinished sentences

BY COMING OUT TO VOTE, THE PEOPLE SHOW...

FAITH IN DEMOCRACY , CIVIC RESPONSIBILITY

- **Determination, self-respect and faith their vote could influence who will lead the country**
 - **Hope something will become better / Desire for change**
 - **Citizen's duty**
 - Respect and responsibility towards the country and future generations
 - Democratic right to vote
 - Expressing the citizens' will
 - They will not allow their vote to be manipulated
 - Political determination / loyalty
-

- Fear for their personal existence and job
- They are following political orders / soldiers of political parties
- They fear the situation will become worse



**Instruction for the participants: Please complete the sentences in the way most appropriate for you*

BY NOT COMING OUT TO VOTE, PEOPLE SHOW...

DISSATISFACTION WITH SYSTEM AND REPRESENTATION OPTIONS

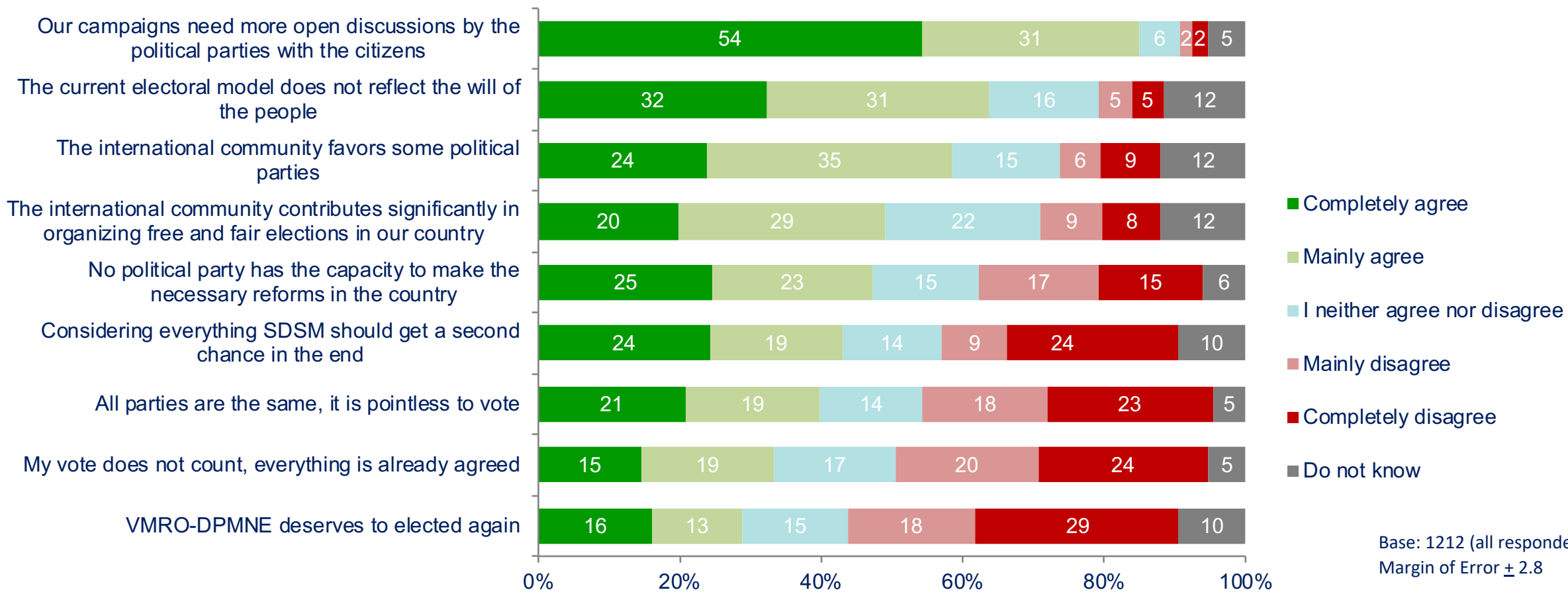
- **Revolt, dissatisfaction and disappointment due to unfulfilled promises**
 - **Distrust in the political parties**
 - **Absence of interest in politics and election activities**
 - They do not see any option that aligns with them
 - Dissatisfaction with the candidates' choices on the MP candidate lists
 - Disbelief that they can influence with their own vote
 - They plan to leave the country
 - Citizens' disobedience
 - They have integrity, they think with their own heads and want to change something which can be achieved if they stop voting for the fake promises given by the political parties
-
- **Irresponsibility in terms of the future of the country and of the citizens**
 - **They allow their right to vote to be manipulated**
 - **They allow someone else to create their future**
 - **They are passive, inert**



**Instruction for the participants: Please complete the sentences in the way most appropriate for you.*

ATTITUDES TOWARDS THE ELECTION SYSTEM

I am going to read to you some statements. For each, please tell me whether you agree or disagree?



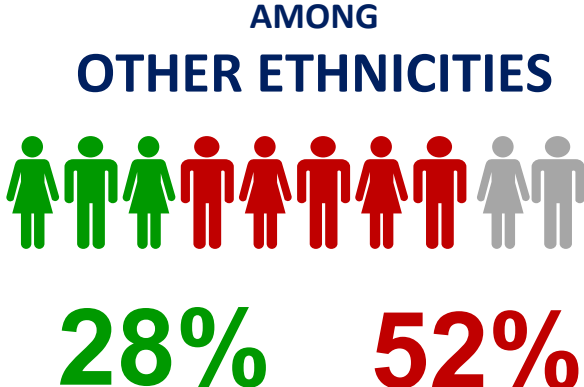
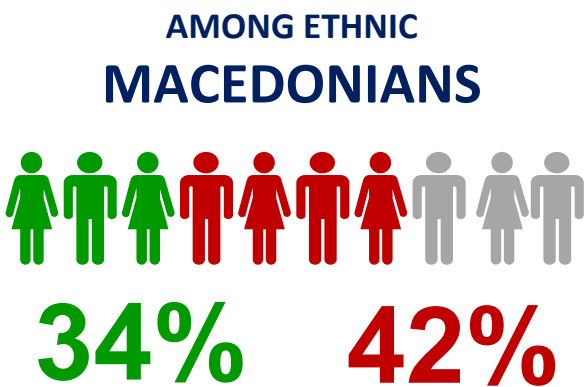
Base: 1212 (all respondents)
Margin of Error ± 2.8

ATTITUDES TOWARDS INCUMBENT AND PREVIOUS MAJORITY

I am going to read to you some statements. For each, please tell me whether you agree or disagree?

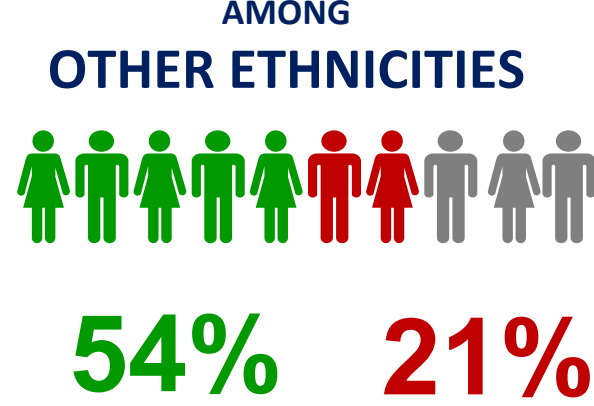
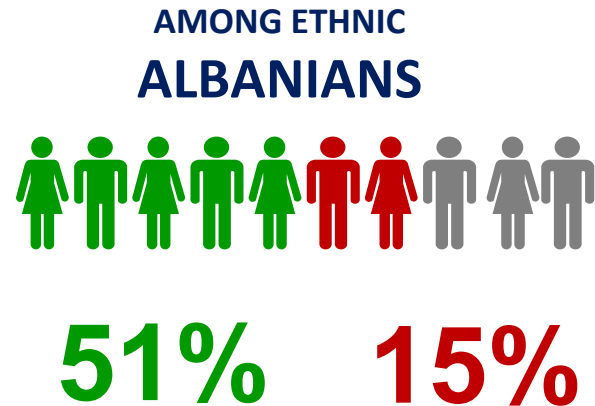
“VMRO-DPMNE deserves to be elected again”

- Favorable
- Unfavorable
- Refuse/ Do not know



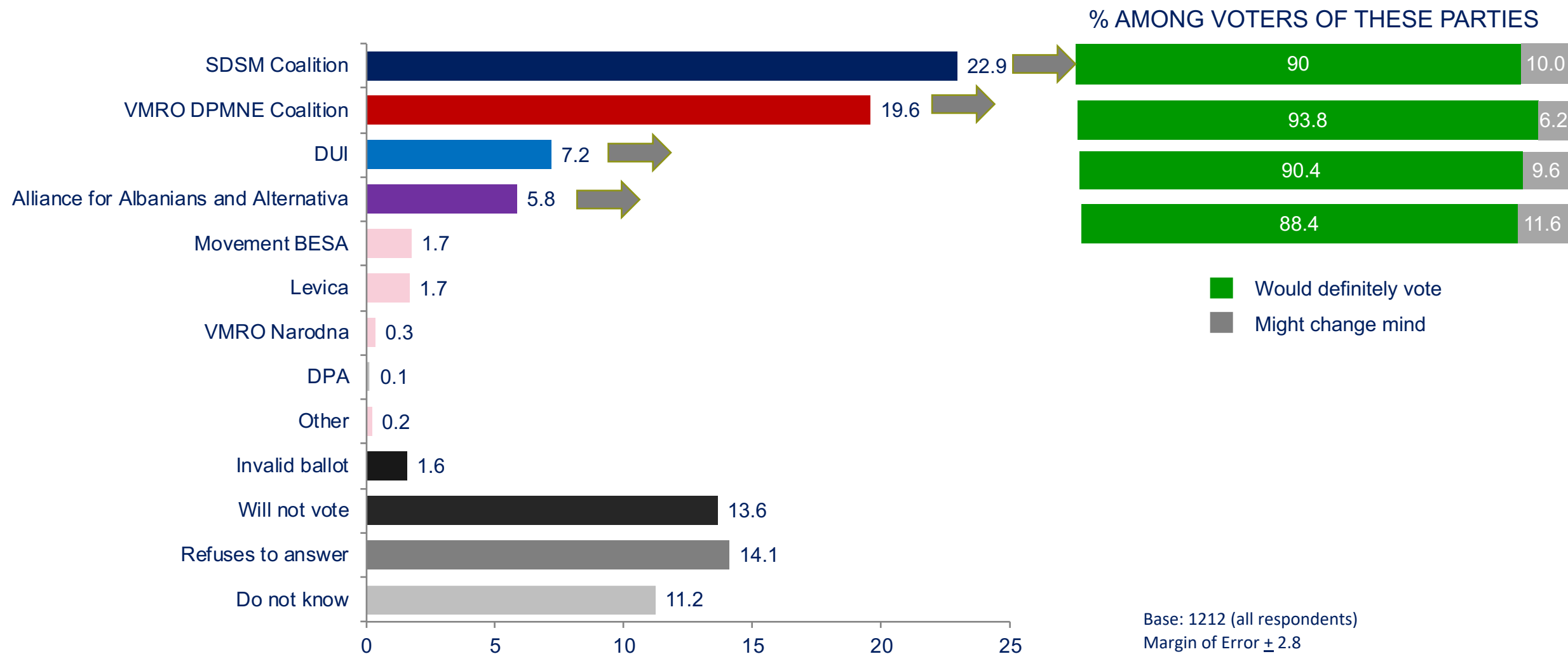
“Considering everything, SDSM should get a second chance in the end”

- Favorable
- Unfavorable
- Refuse/ Do not know



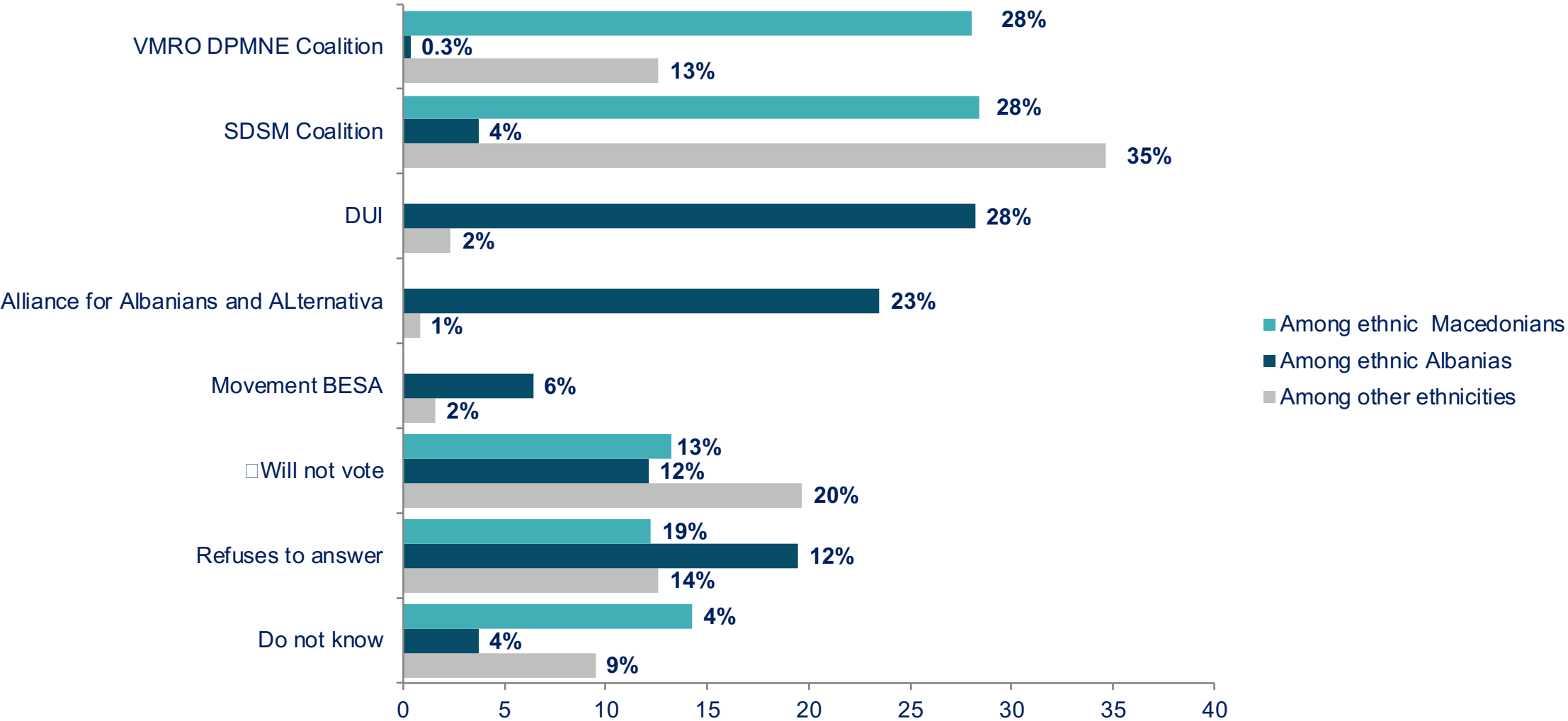
PARLIAMENTARY ELECTIONS

If the parliamentary elections were held today, which party would you vote for?
Would you say you are definitely voting for this party or you might change your mind?



PARLIAMENTARY ELECTIONS

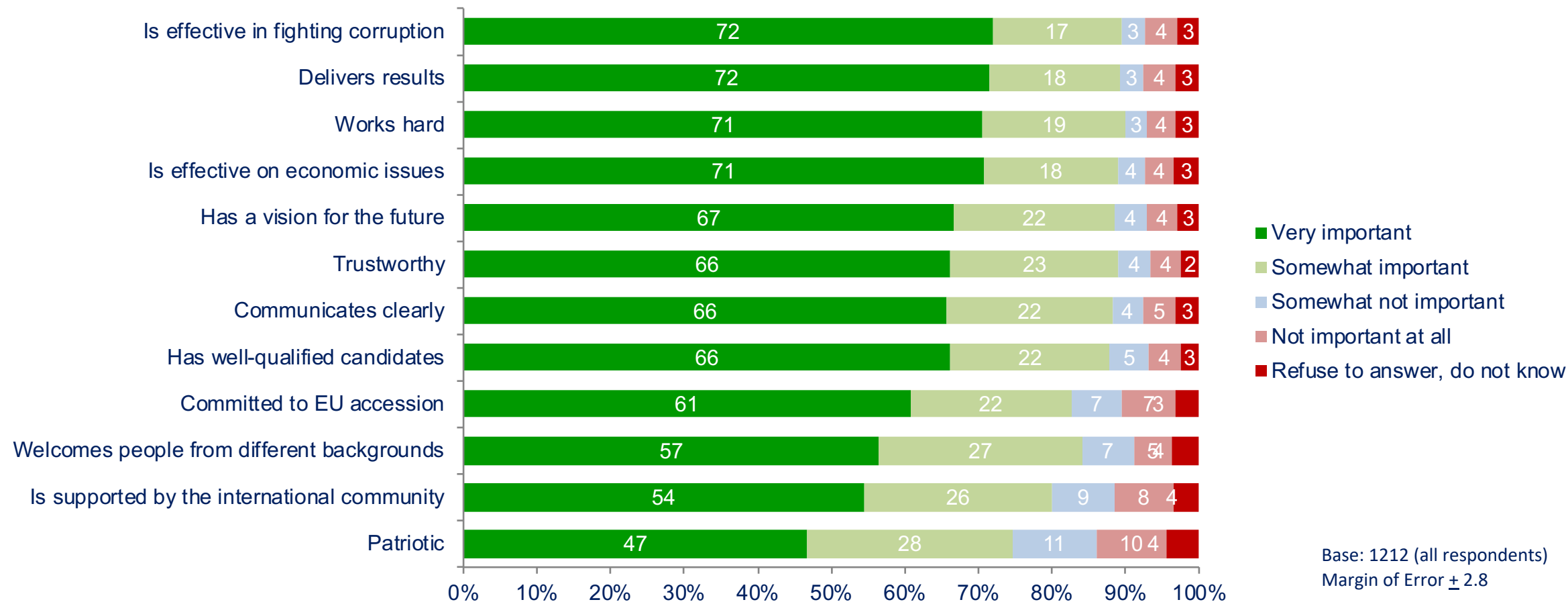
If the parliamentary elections were held today, which party would you vote for?
Would you say you are definitely voting for this party or you might change your mind?



ELECTORAL ATTRIBUTES

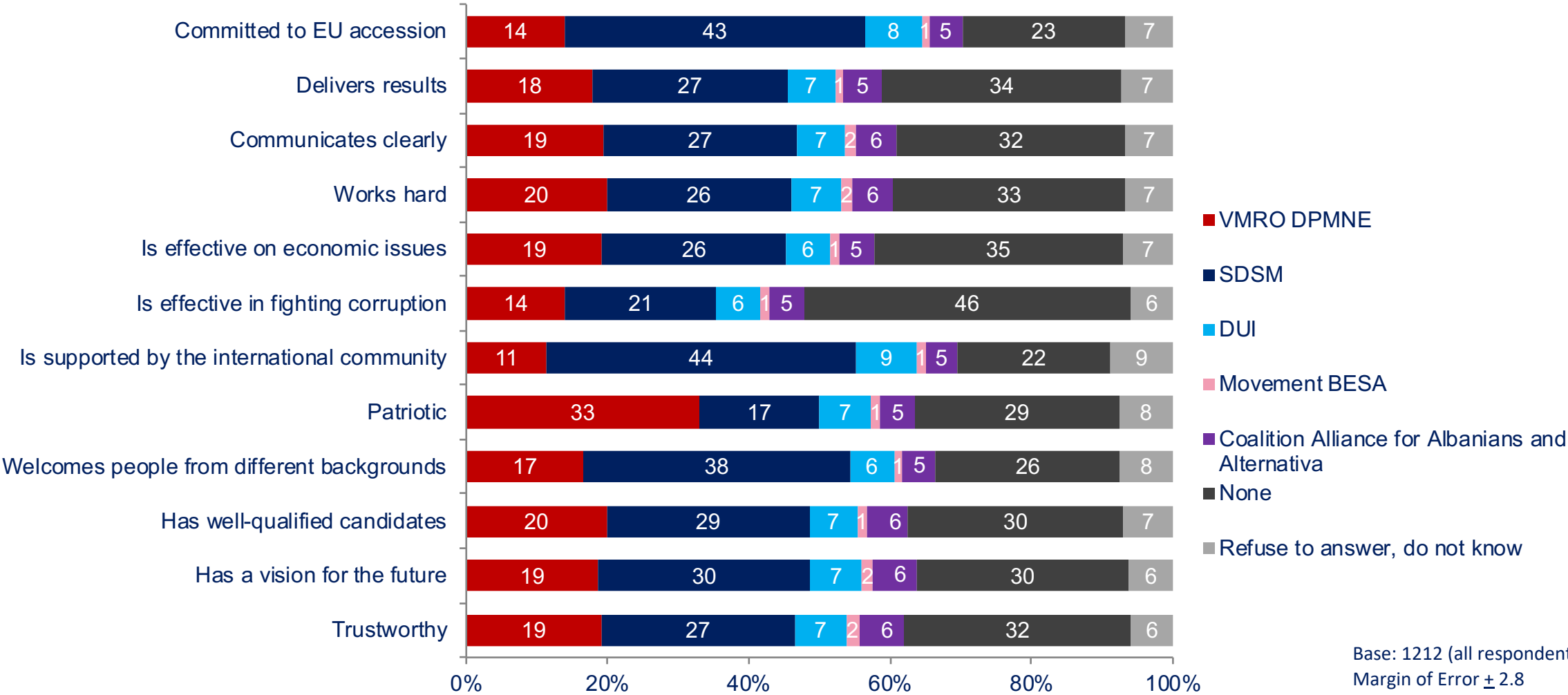
ELECTORAL ATTRIBUTES

How important is the following in helping you decide which party to support?



ELECTORAL ATTRIBUTES

Which party best fits this description?



Base: 1212 (all respondents)
Margin of Error ± 2.8

WHAT CITIZENS WANT

PERSONAL INTEGRITY

- Honest, not steal, incorruptible
- Responsible, fulfil promises
- Devoted to the people and familiar with the local problems
- Person with opinions, not slave to the party
- Not follow personal interests
- Capable and proactive in the assembly, work ethic
- Have political and life experience
- Intelligent, with adequate education, well-spoken
- Realistic, modest, no legal accusations against them
- Conscientious, humane



WHAT THE POLITICAL PARTIES OFFER

PUT SELF AND PARTY OVER CITIZENS

- People who obey and can be controlled by parties
- Loyal, marionettes, soldiers of the political party
- Corrupted
- Greedy, hypocrites, selfish
- Inexperienced



**There is a perception that even if the person has the characteristics of the desired MP, the party has the power to change or remove this politician using its system of pressures and influences*

PRIORITIES FOR THE NEXT PARLIAMENT:



- **Economy, investments, employment**
 - **Judiciary system, justice**
 - **Youth migration**
 - Health system
 - Social system
 - Education system
 - Urbanism
 - Environment
 - Administration
 - Infrastructure
 - Police

Are you interested in the platforms of the political parties?

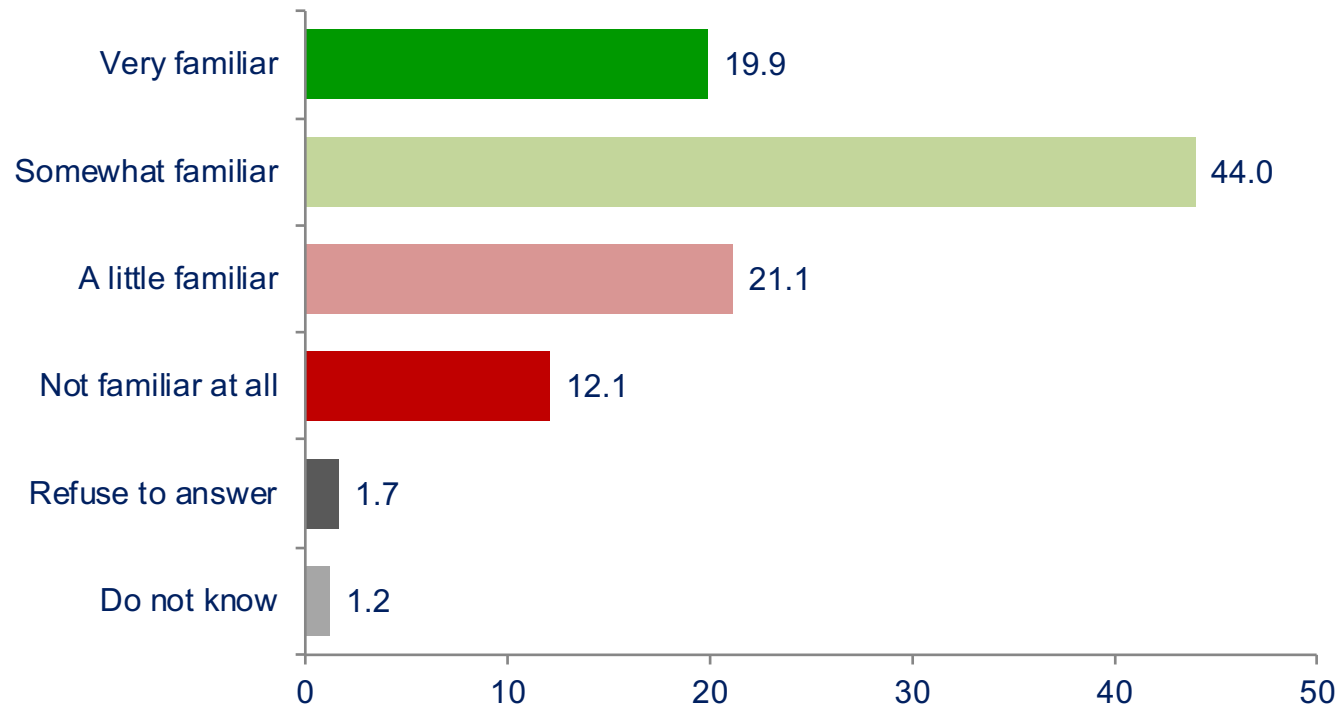
- The majority of the participants **are not interested due to the complete distrust**, assume nothing would be accomplished of what is written down.
- Additionally, the participants emphasize **there are no significant differences in the party platforms** and the political parties have the same projects and promises for every pre-election period.
- Nevertheless, one smaller part of the participants read the pre-election programs of the political parties and is interested in the offer of the political parties.
- The participants demand **reporting and accountability regarding the unfulfilled promises presented in the pre-election programs** which made the party win the elections.



VII. EU AND NATO ACCESSION AND PRESPA AGREEMENT

THE PRESPA AGREEMENT

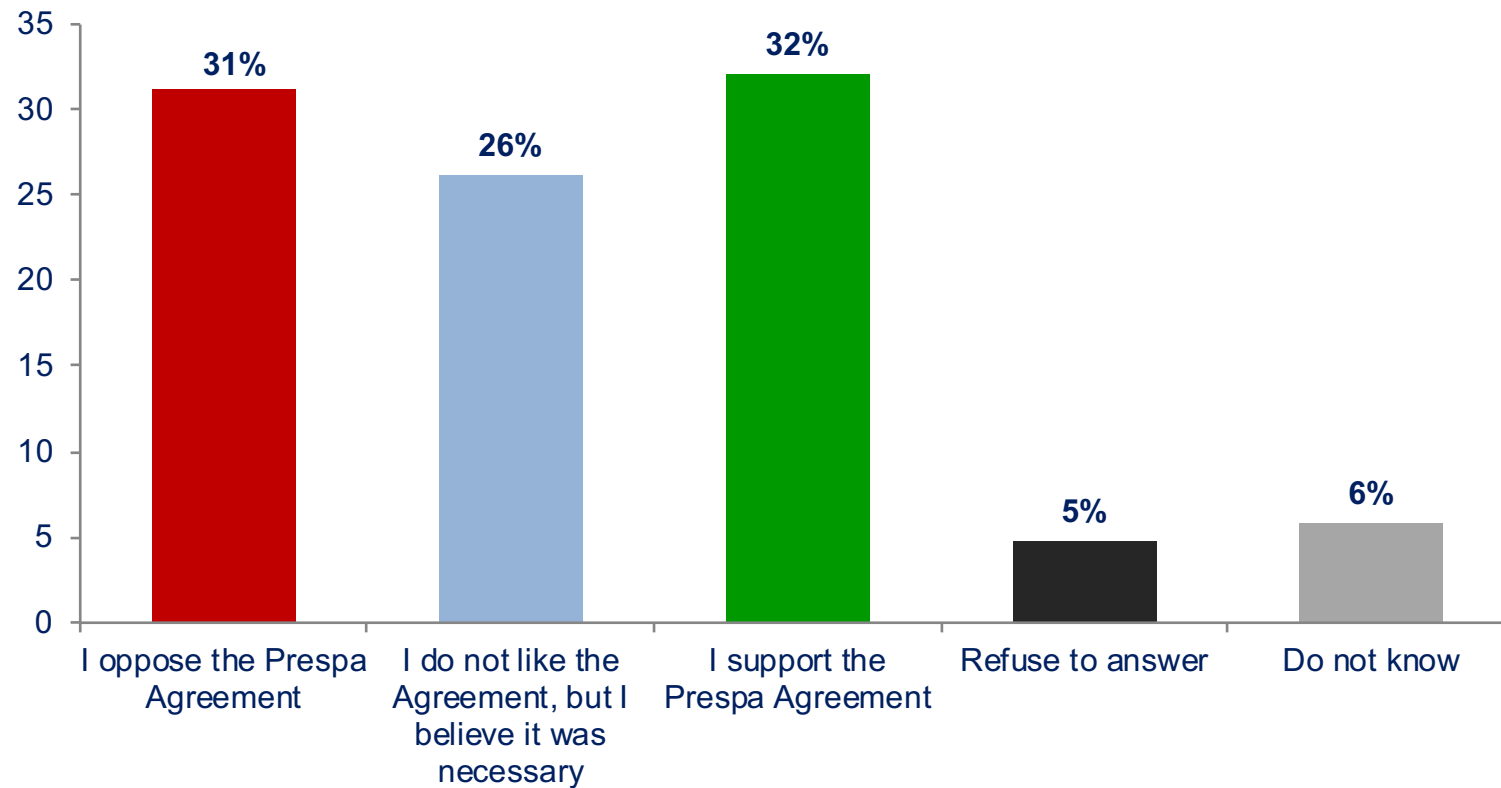
In 2018, our country and Greece signed an agreement. How familiar are you with the content of this agreement?



Base: 1212 (all respondents)
Margin of error $\pm 2,81$

SUPPORT FOR THE PRESPA AGREEMENT

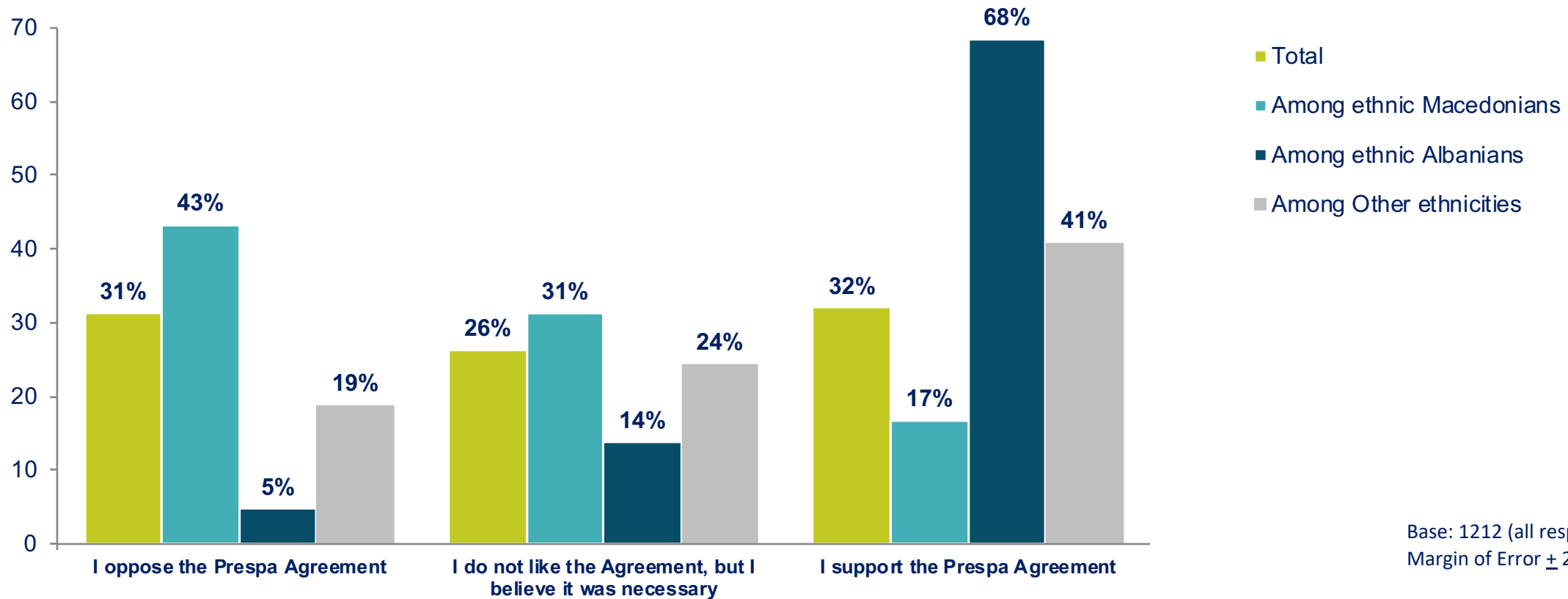
Which of the following is closest to your opinion today about the Prespa Agreement?



Base: 1212 (all respondents)
Margin of error $\pm 2,81$

SUPPORT FOR THE PRESPA AGREEMENT

Which of the following is closest to your opinion today about the Prespa Agreement?



Base: 1212 (all respondents)
Margin of Error ± 2.8

NOT simply FOR/AGAINST for ethnic Macedonians. Complex issues with competing emotions (group and personal identity and culture, pride) and logic (future necessity).

- The personal conflict is caused by several factors:



Necessity of the agreement as a pre-condition for Euro-Atlantic integration of the country

Revolted by how the referendum “*was forced without a debate*”

Awareness the country is not ready and not being reformed, and its incompatibility with European standards

Revolted that the EU did not fulfill promises nor rewarded the country for its huge sacrifice

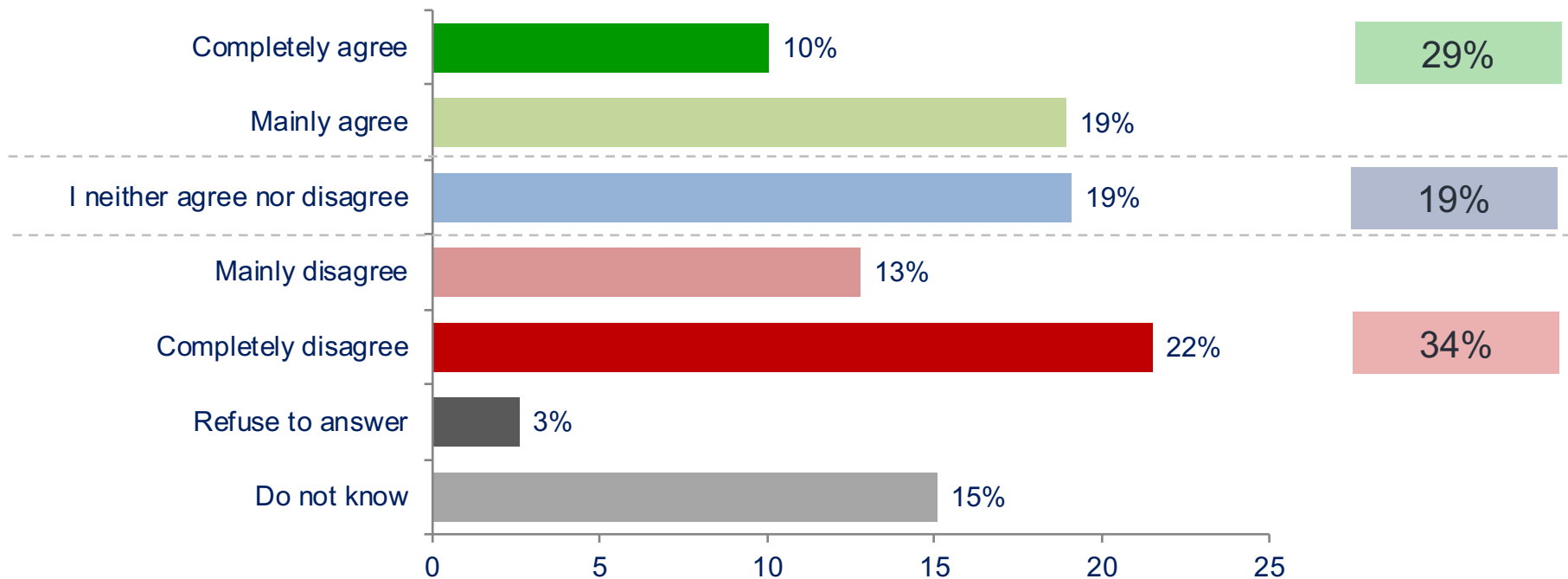
Danger of losing our identity, language and history

Absence of mutual agreement of the two biggest parties on key state issue

* One smaller, but significant portion of the participants considers the name change unacceptable: “the Prespa Agreement is a forced action, not legally justified and “it is conducted by foreigners.”

VMRO-DPMNE AND REVISING THE PRESPA AGREEMENT

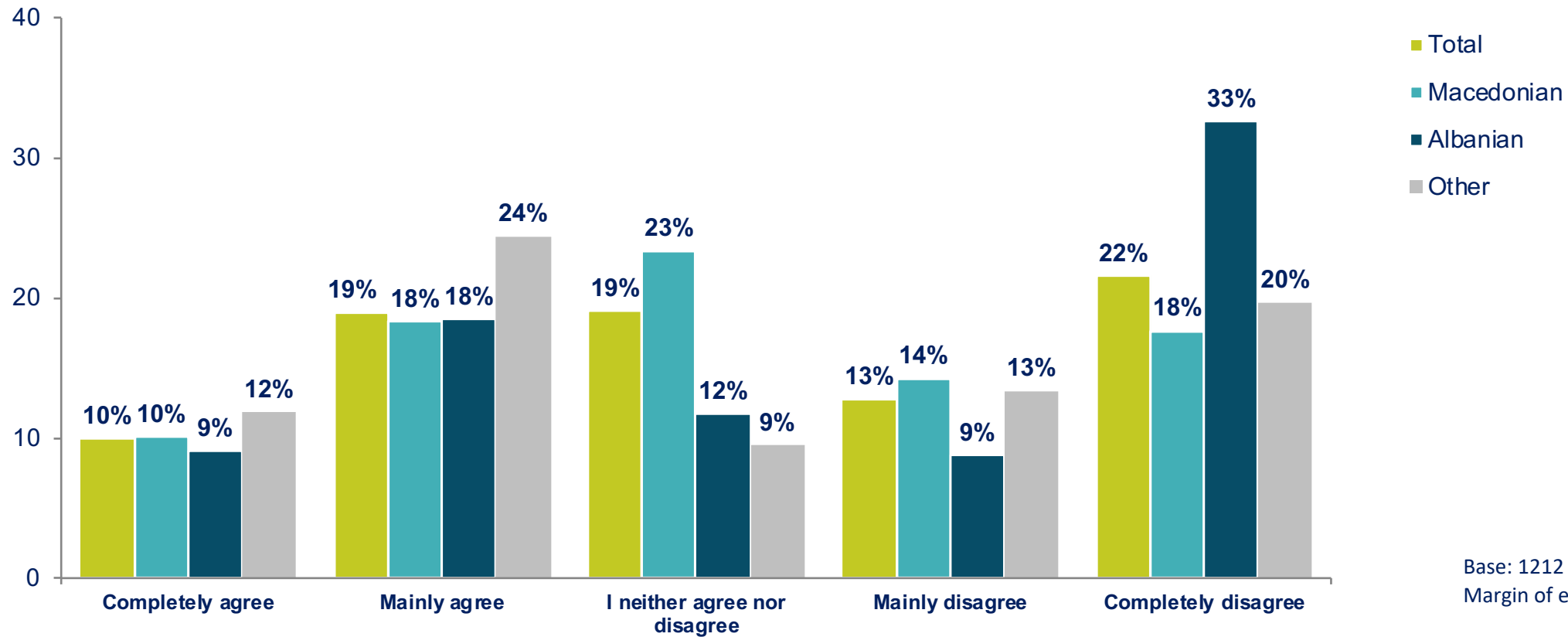
Please tell me whether you agree or disagree that VMRO-DPMNE will revise the Prespa Agreement when they come to power?



Base: 1212 (all respondents)
Margin of Error ± 2.8

VMRO-DPMNE AND REVISING THE PRESPA AGREEMENT

Please tell me whether you agree or disagree that VMRO-DPMNE will revise the Prespa Agreement when they come to power?

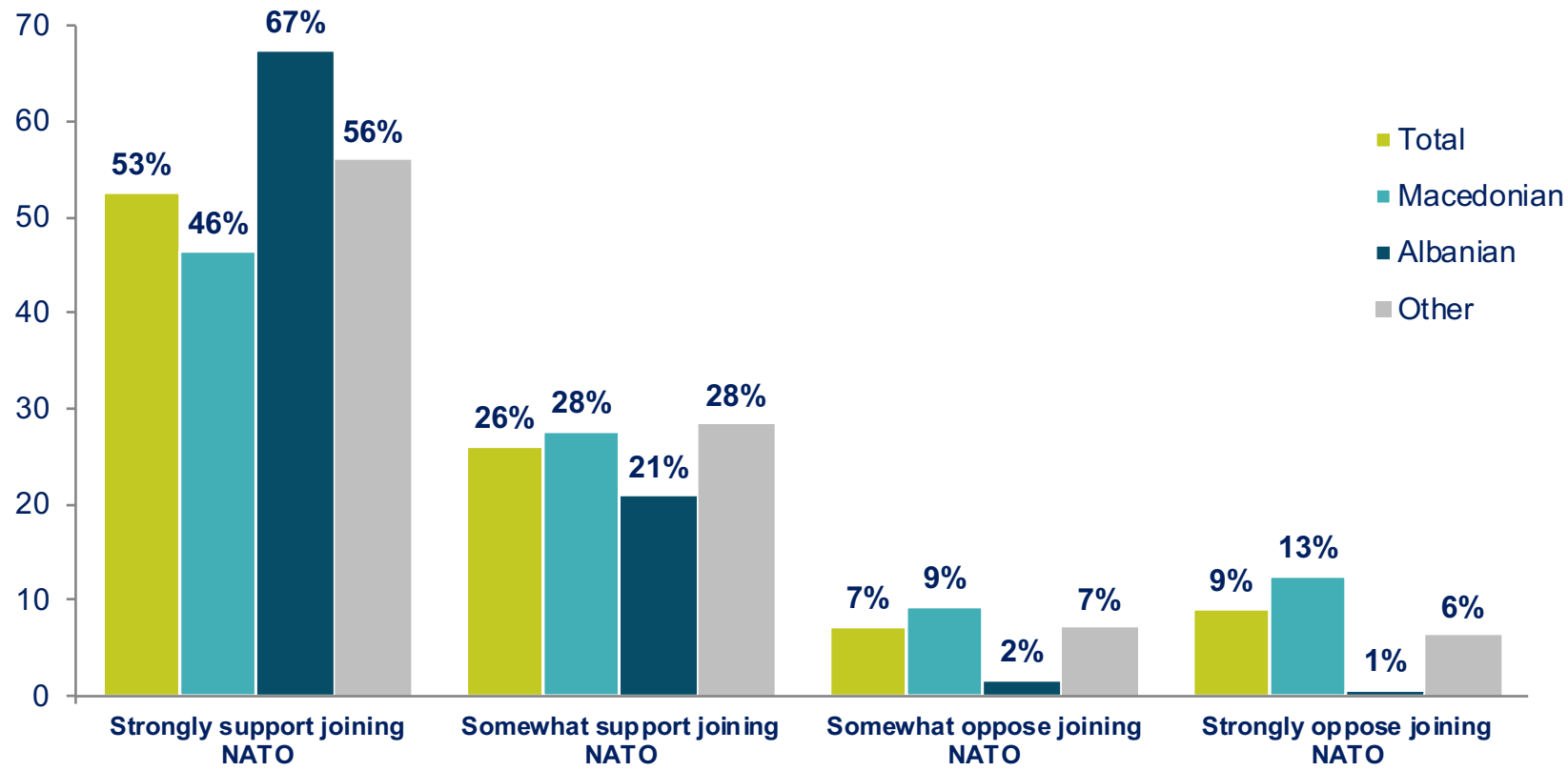


Base: 1212 (all respondents)
Margin of error $\pm 2,81$

SUPPORT FOR EU AND NATO ACCESSION

Our country will likely be joining NATO soon. Do you...

79% Total Support to join NATO

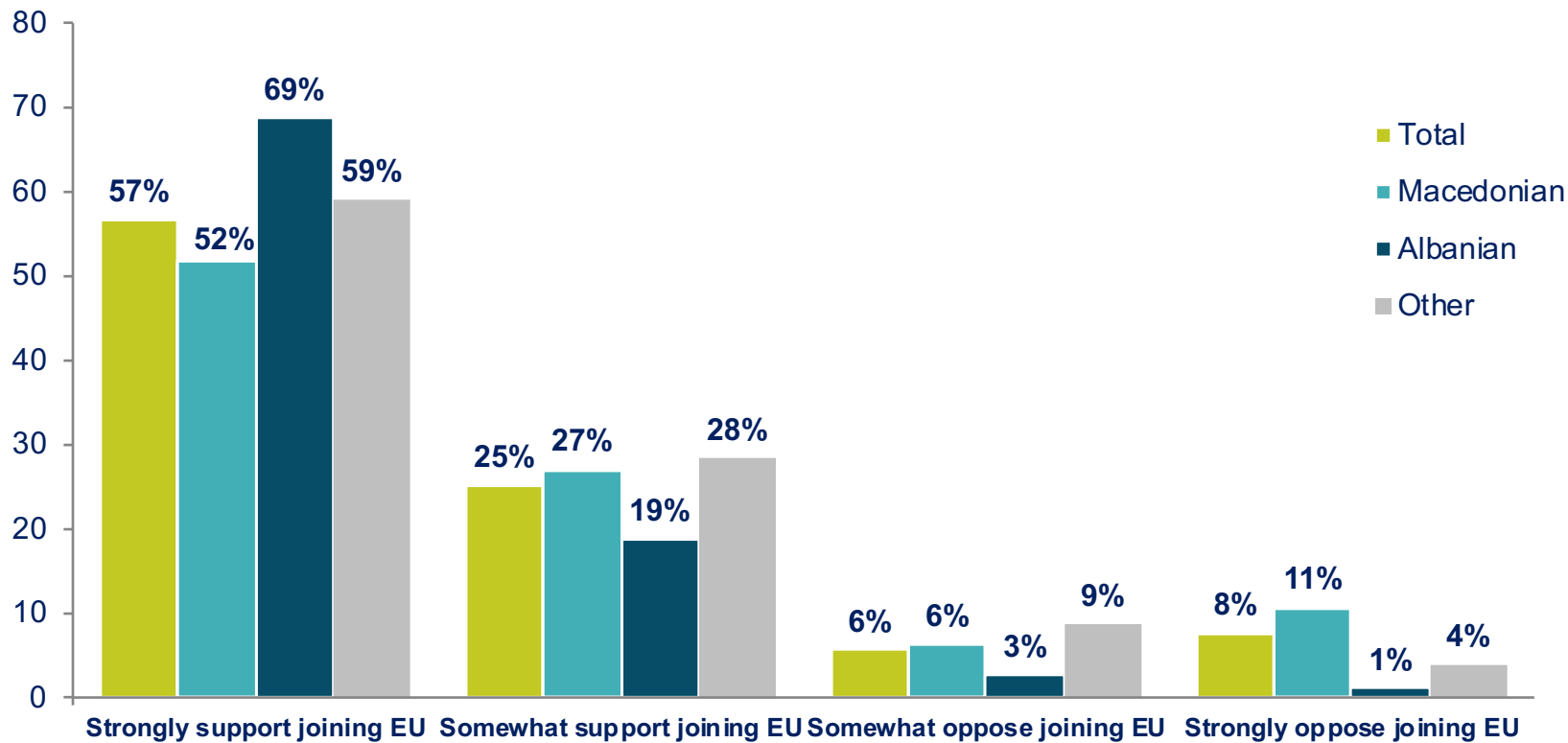


Base: 1212 (all respondents)
Margin of Error ± 2.8

SUPPORT FOR EU AND NATO ACCESSION

Our country is waiting to move towards final talks to join the European Union. Do you...

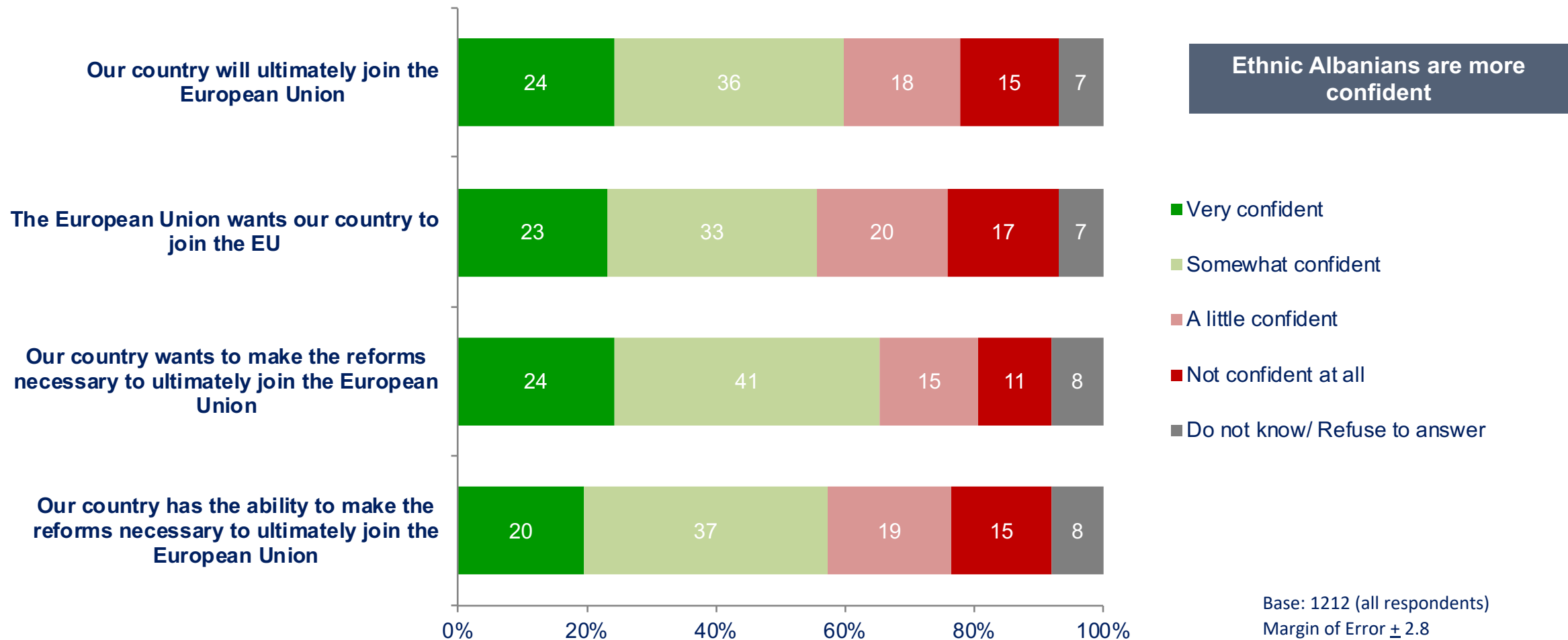
82% Total Support joining EU



Base: 1212 (all respondents)
Margin of Error ± 2.8

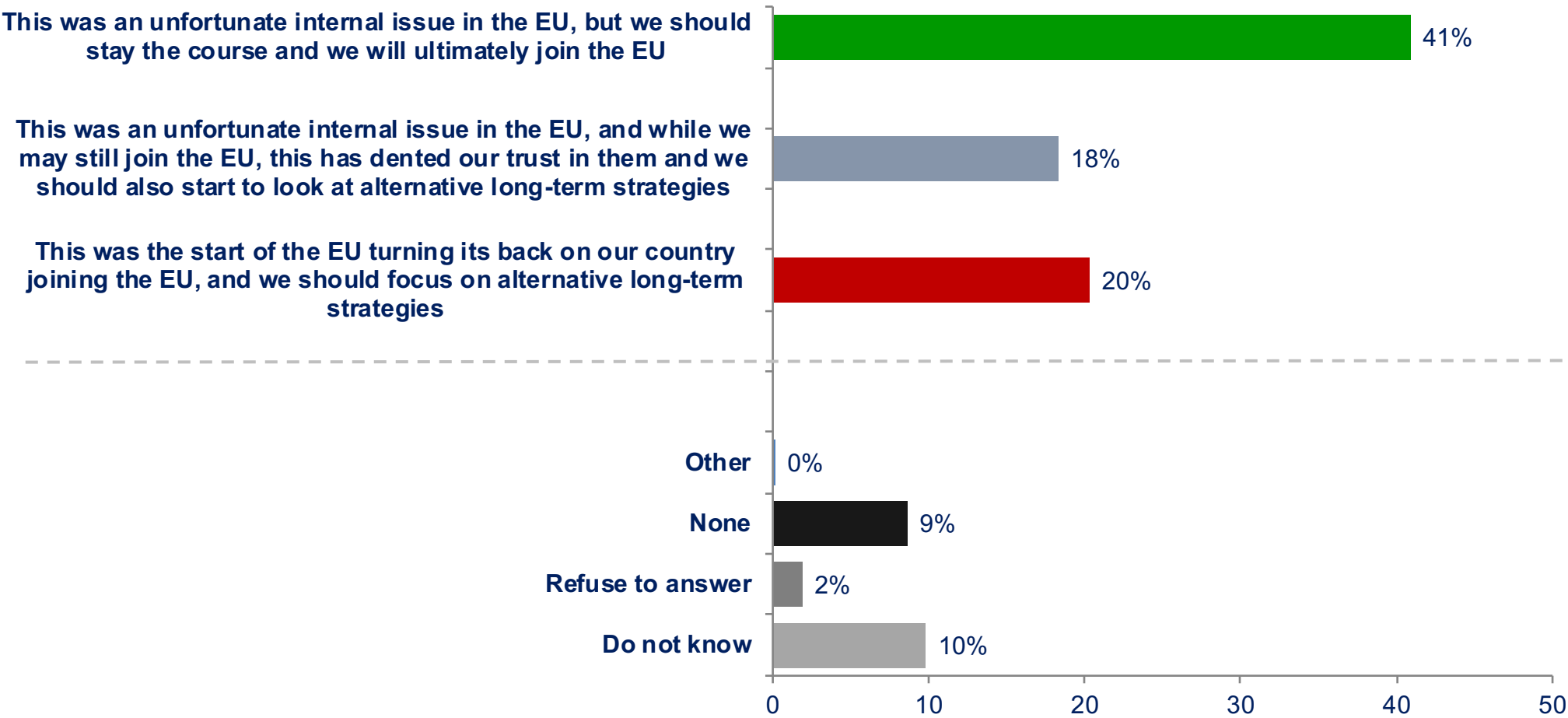
CONFIDENCE RELATED TO EU ACCESSION

How confident are you that...?



IMPACT OF EU DELAYS

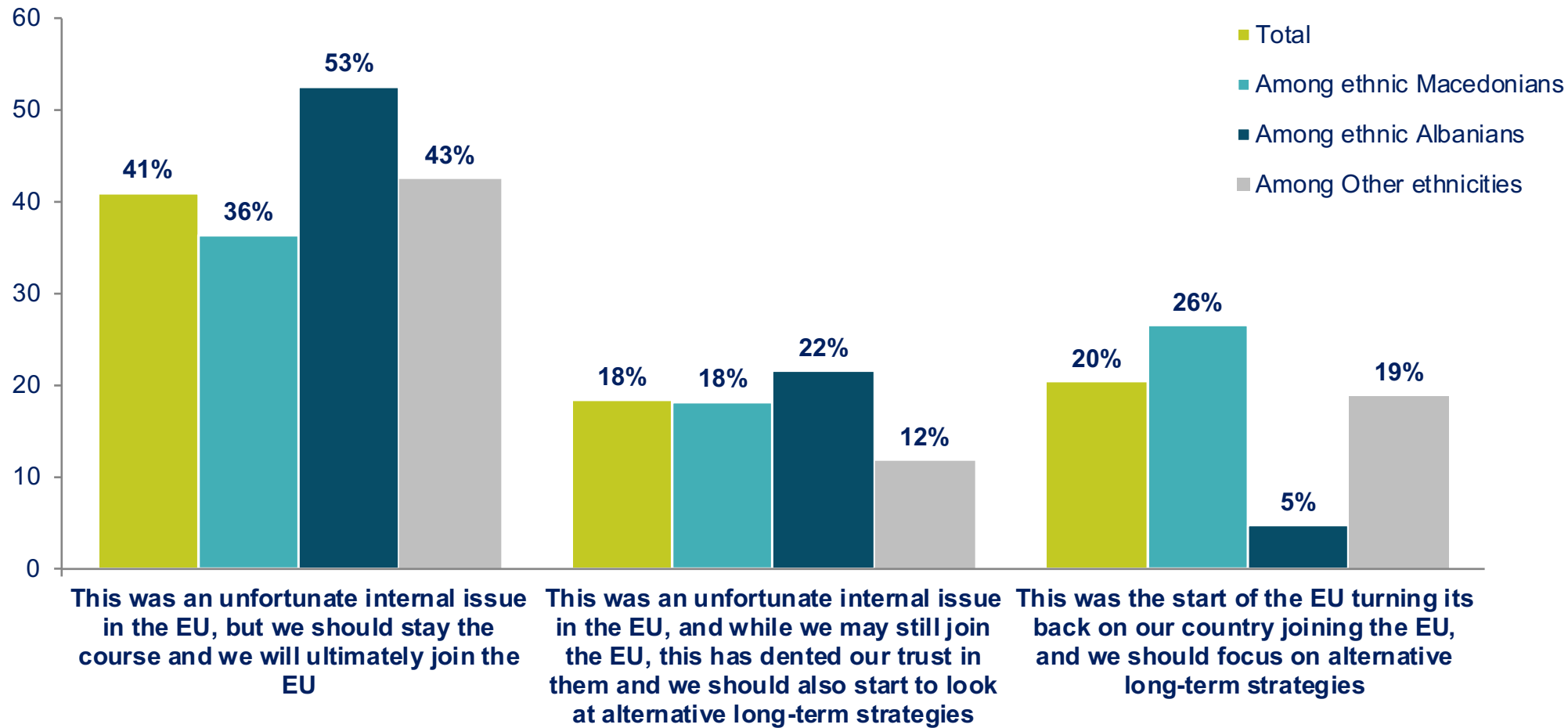
In October 2019, after changing the name of our country, the EU blocked starting talks with us about EU membership. Which of the following is closest to your view?



Base: 1212 (all respondents)
Margin of Error ± 2.8

IMPACT OF EU DELAYS

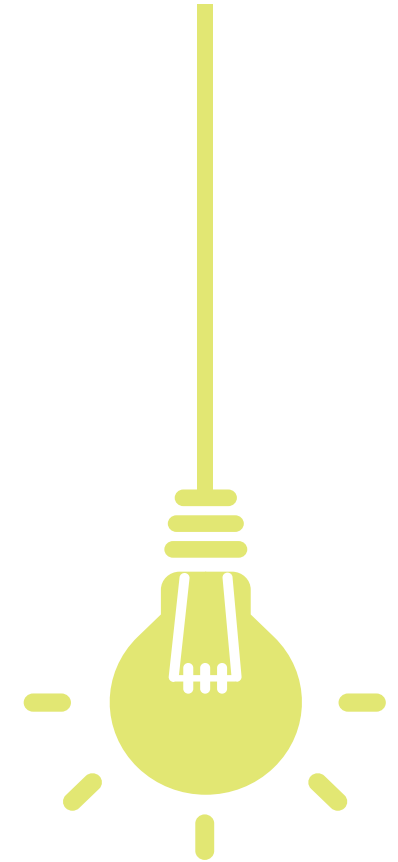
In October 2019, after changing the name of our country, the EU blocked starting talks with us about EU membership. Which of the following is closest to your view?



Base: 1212 (all respondents)
Margin of Error \pm 2.8

AWARE OF A NEW METHOD BUT UNINFORMED ABOUT DETAILS

- Most see a positive aspect:
 - ✓ Awareness about the necessity for reforms
 - ✓ Pressure for implementing the reforms
 - ✓ Greater discipline and control
 - ✓ Reforms quality and sustainability



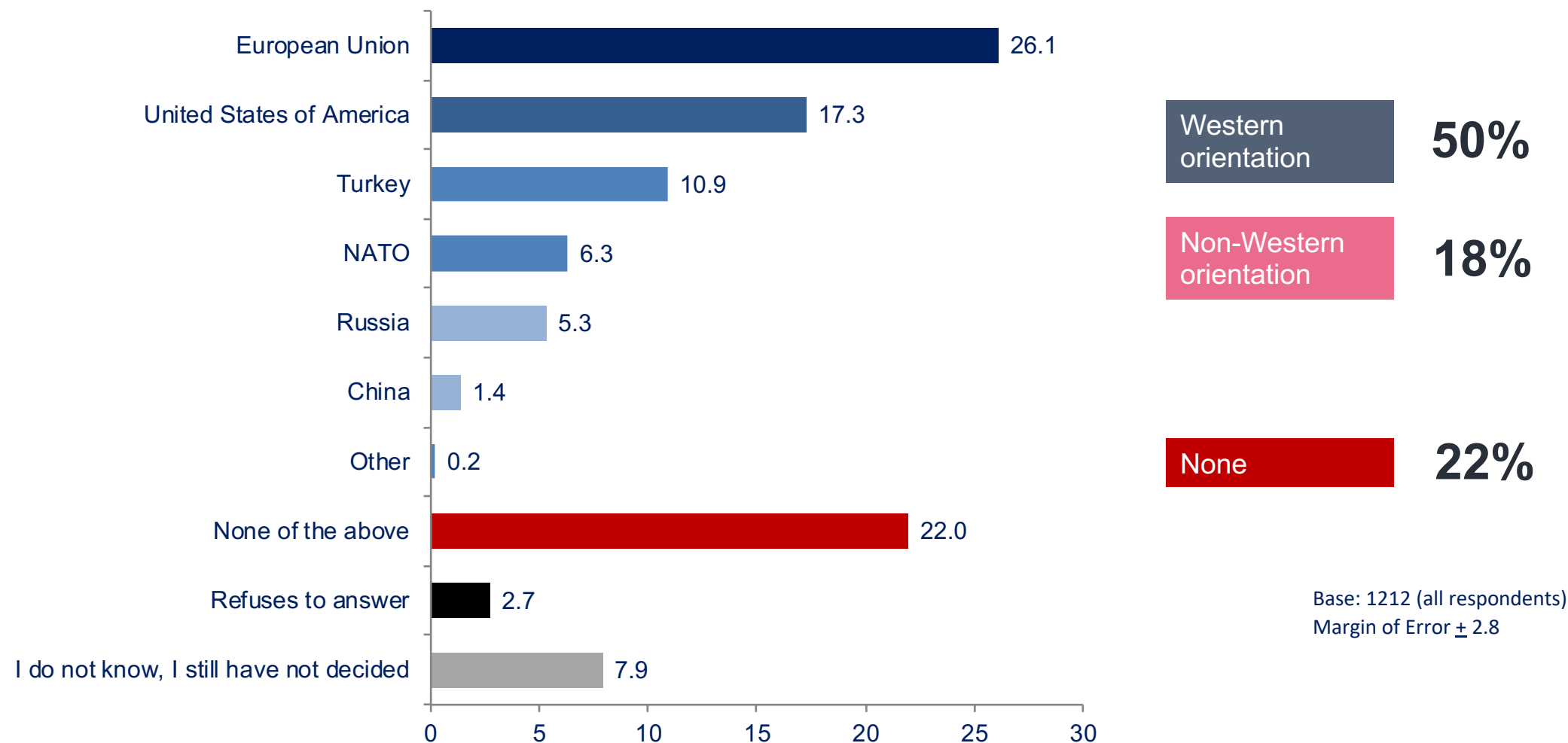
Perception of the new EU methodology

- A small minority are skeptical and worried
- For them, the new methodology presents:
 - ✓ EU mistake and consequence borne by North Macedonia for their inner disagreement
 - ✓ Double standard for new member states
 - ✓ Manipulation by the EU
 - ✓ Disappointment
 - ✓ Making the journey towards the EU harder and longer
 - ✓ Possibility for blackmailing and setting conditions for small things
 - ✓ Easier obstruction during the negotiations



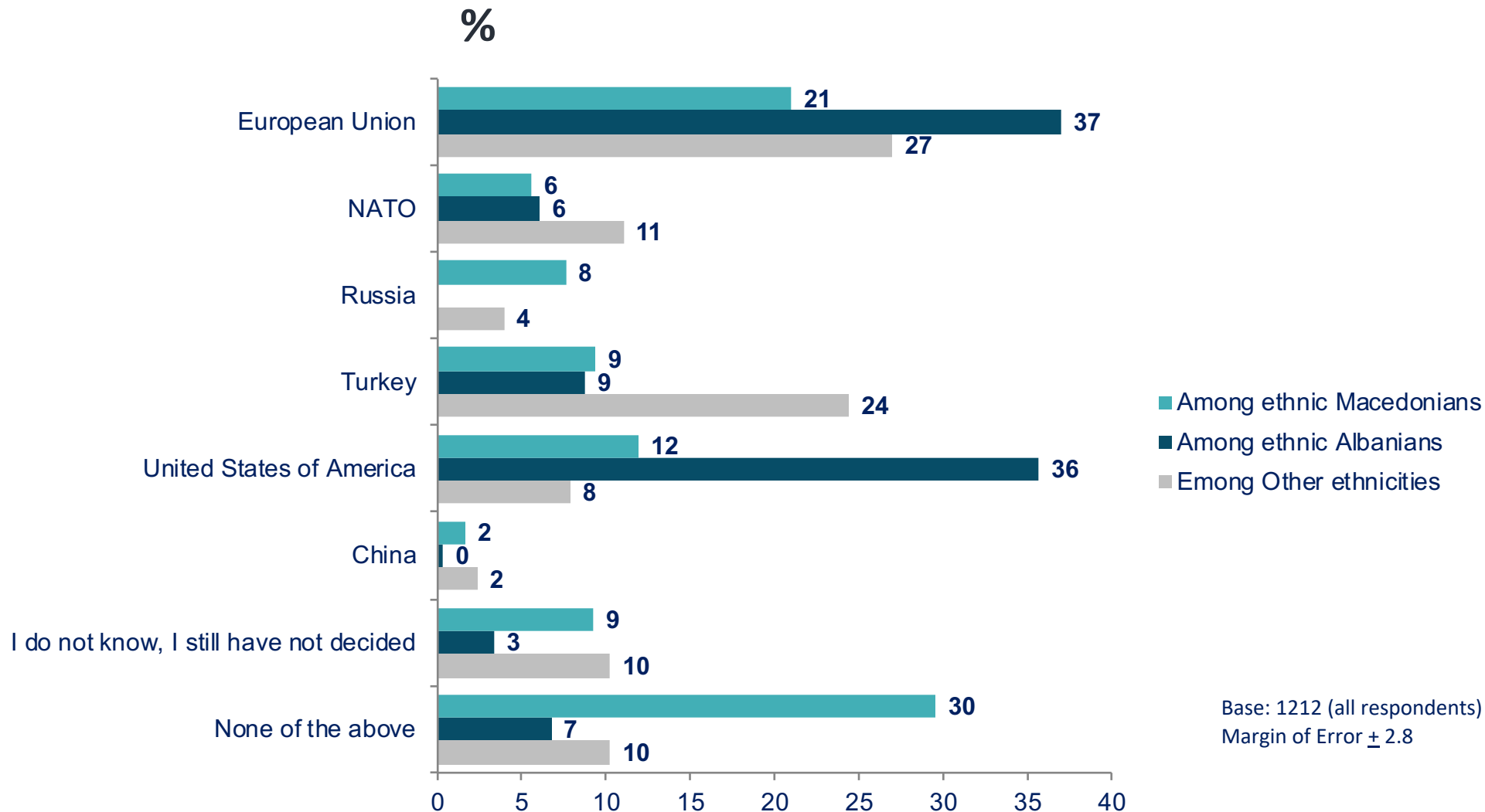
EXTERNAL SUPPORT

According to you, which one of these countries or organizations helps our country's national interests the most?



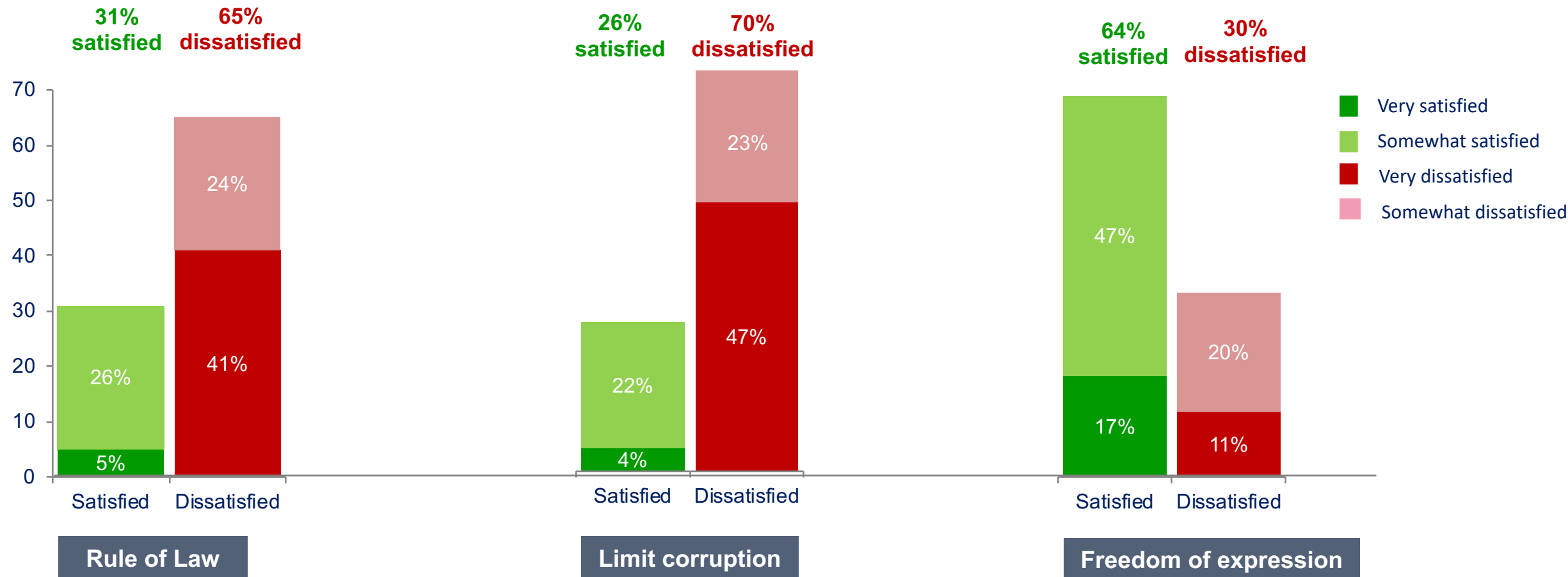
EXTERNAL SUPPORT

According to you, which one of these countries or organizations helps our country's national interests the most?



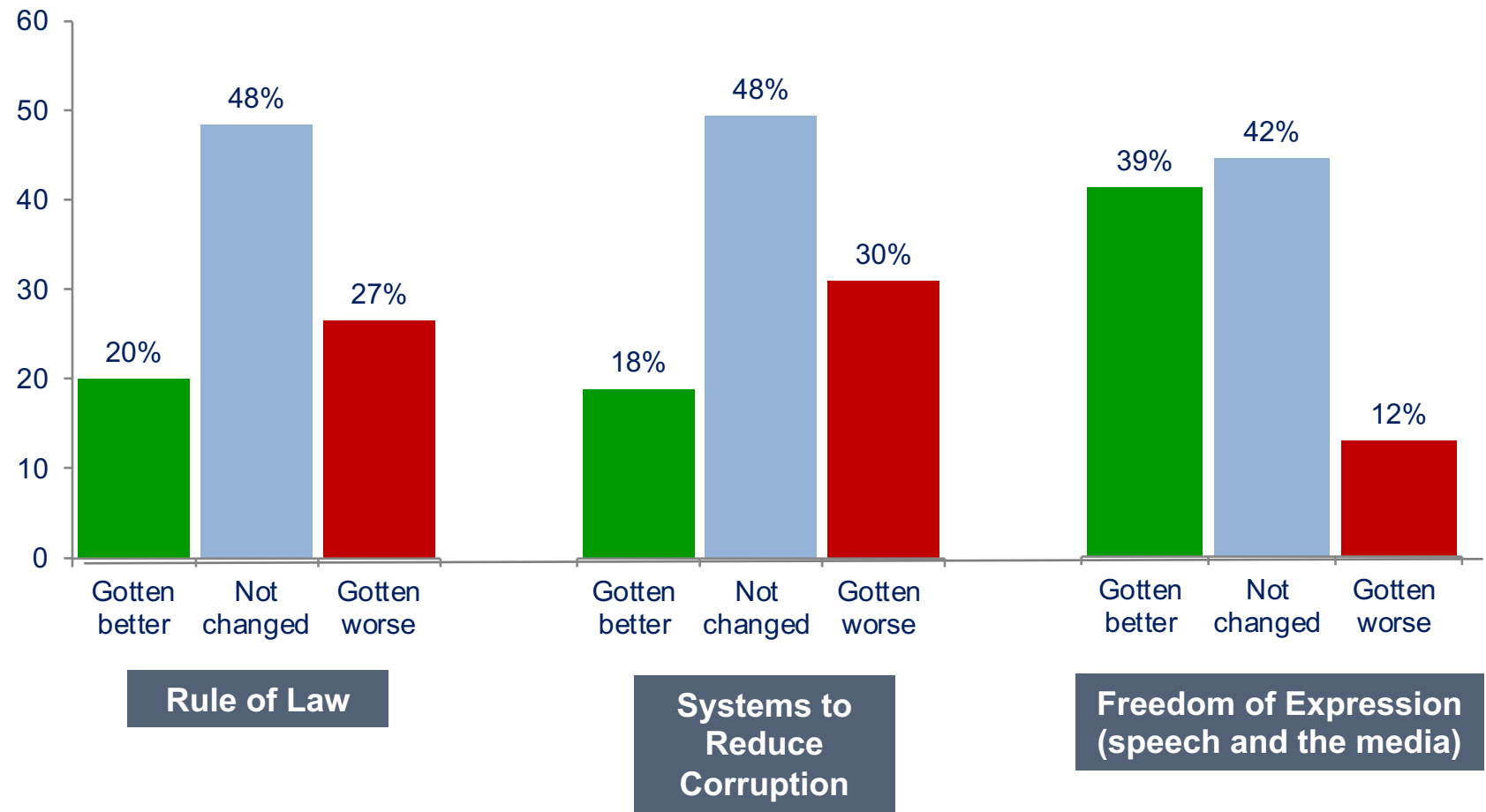
VIII. KEY REFORMS

SATISFACTION RELATED TO KEY REFORMS



PERCEIVED TRENDS IN KEY REFORMS

Compared to three years ago, do you think the...



JUDICIARY AND RULE OF LAW

Situation

- **One of the most serious problems in the country**
- Politicized judiciary for the past 30 years
- Absence of rule of law
- The laws are not applicable for everyone nor applied equally; citizens are powerless and unprotected
- “Turkish soap opera” and “Monty Python judiciary”

Who is responsible?

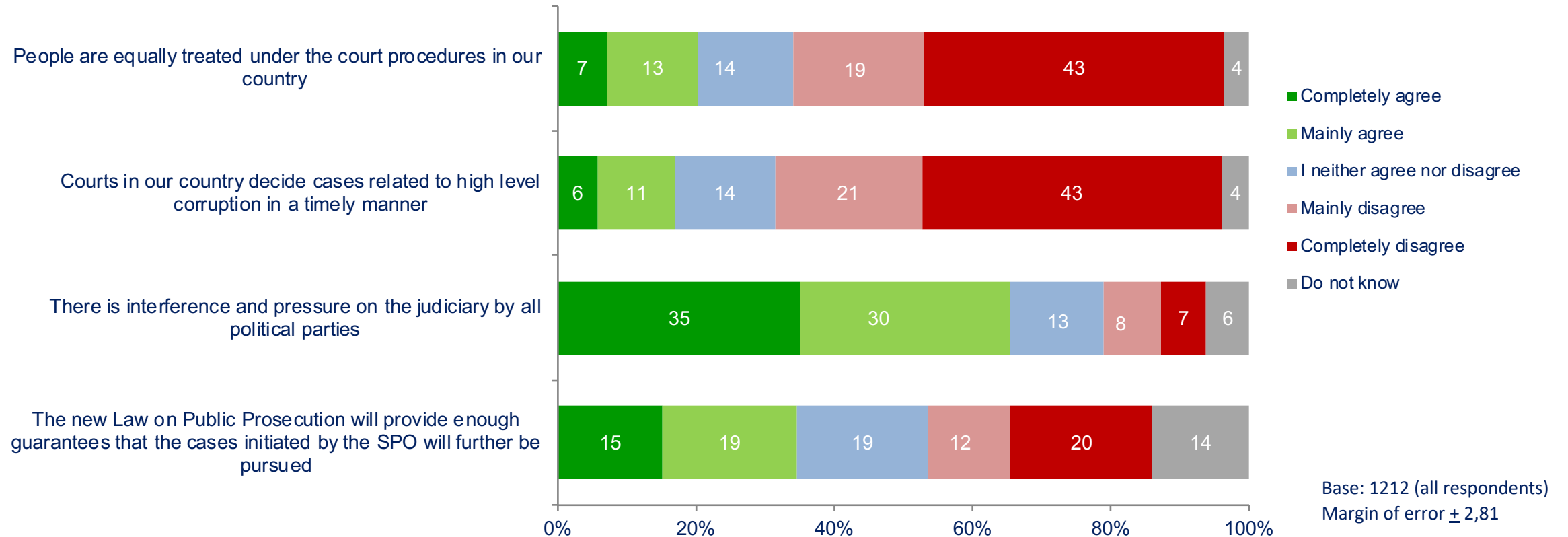
- **All political parties**
- The government which did not make reforms in the judiciary system
- Business elites
- Corrupted judges and prosecutors
- Absence of control and accountability for judges
- Special Prosecutors Office

Special Prosecutors Office and the “Racket” case

- **Great disappointment and destroyed hope for justice**
- Peak of the criminal and organized corruption in the judiciary system
- Betrayed heightened expectations after international influences selected the special public prosecutor

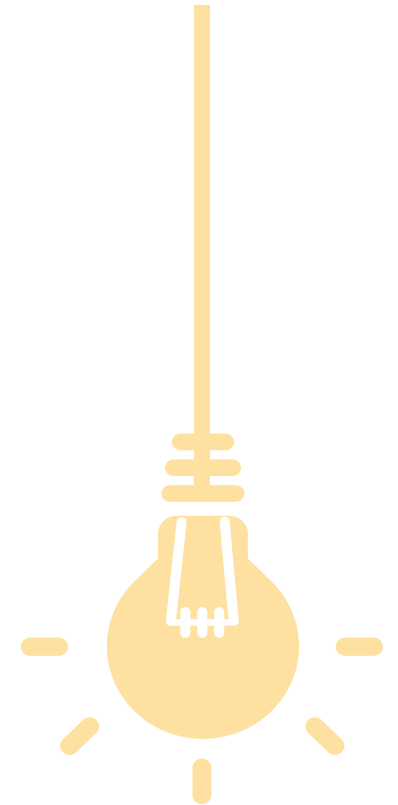
JUDICIARY AND RULE OF LAW

I am going to read to you some statements. For each, please tell me whether you agree or disagree



New Law on Public Prosecution

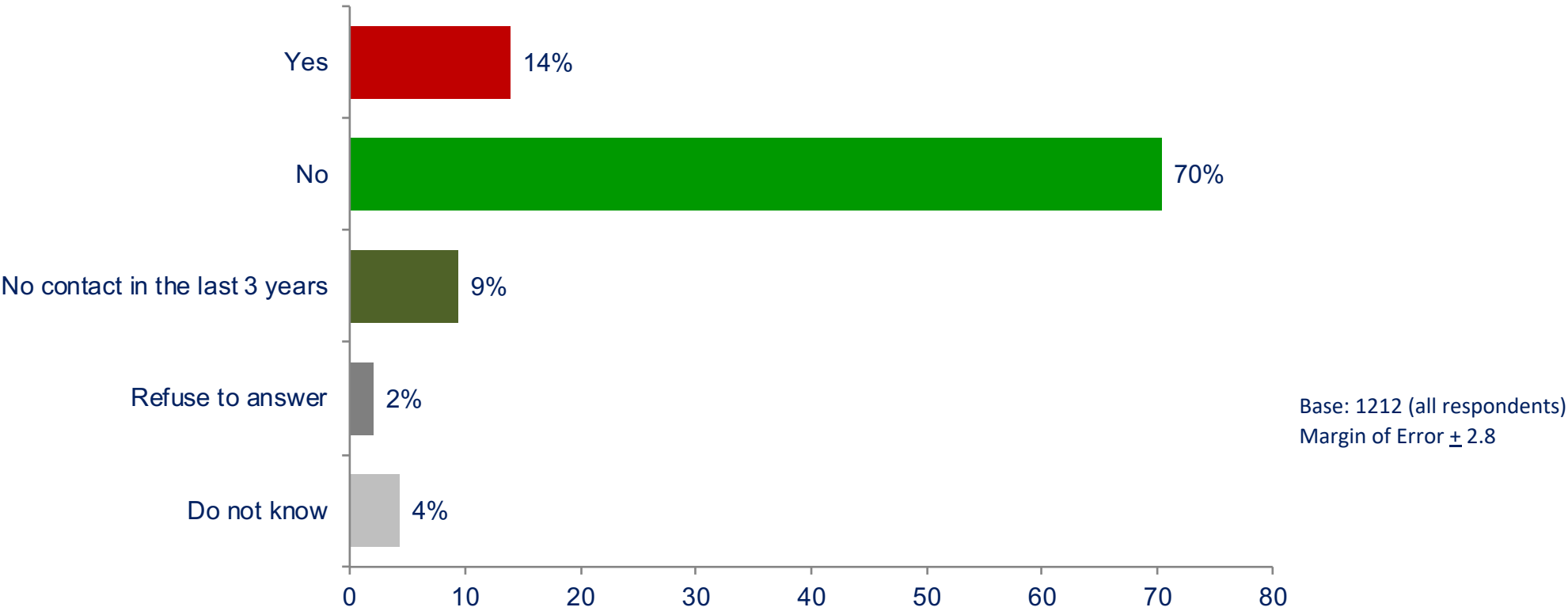
- Uninformed
- Represents hope for some, but for others it is not legal and presents double standards



LIMITING CORRUPTION

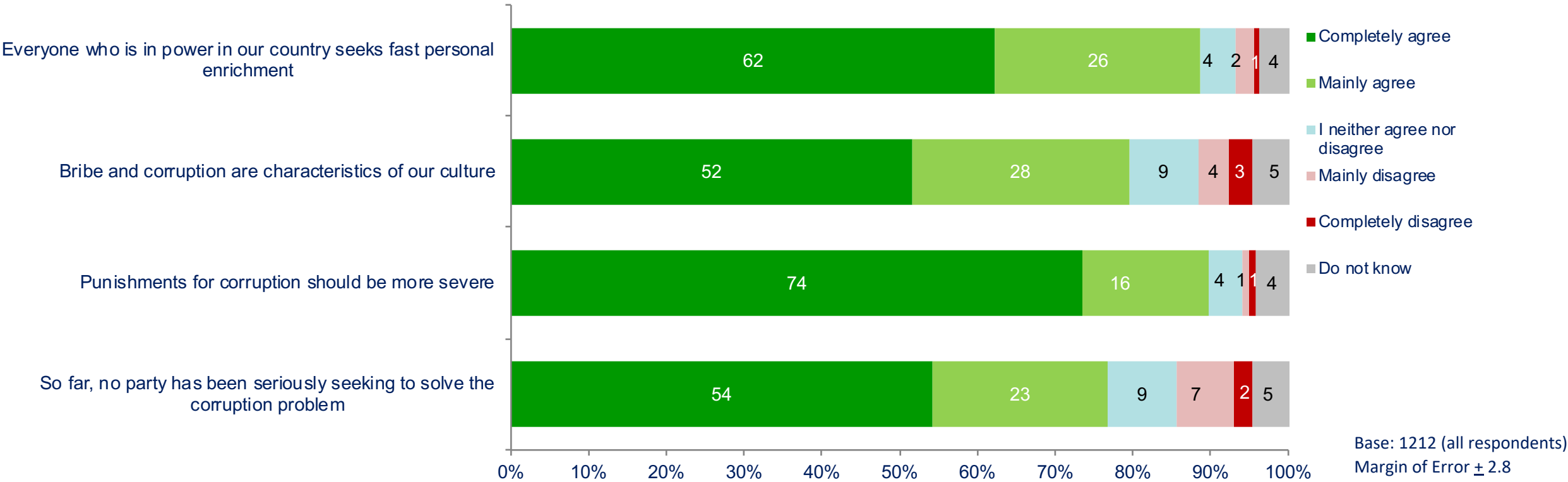
CORRUPTION

In the past three years, have you, personally, had to do a favor, give a gift, or pay OFFICIALS IN THE PUBLIC SECTOR in order to get services or a document that the government is supposed to provide at no cost?



ATTITUDES TOWARDS CORRUPTION

I am going to read to you some statements. For each, please tell me whether you agree or disagree.



FREEDOM OF EXPRESSION

The Media landscape

Too dependent on money from political system

- Profit before quality and objectivity
- Developed marketing network of the political parties
- Unprofessional reporting
- Too many personal points of view

Changes in the Media

Positive improvements !

- Greater freedom of speech in the media
- Greater balance among different political viewpoints
- Less government propaganda
- More debate programs with confronted viewpoints

Trust in Media

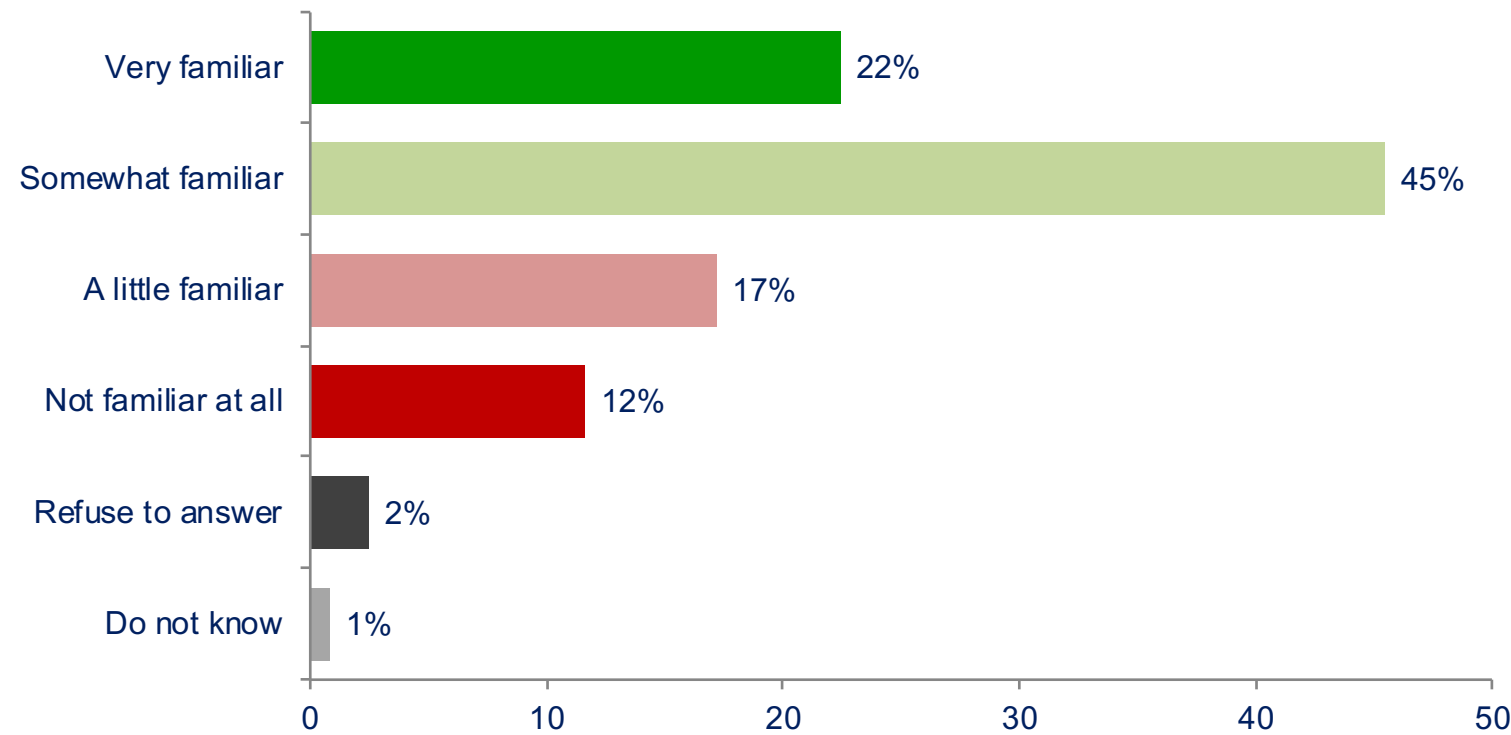
Expect more in this direction

- There is still absence of independence and objectivity when reporting
- Low level of media trust
- More different media are followed in order to form one's attitude and opinion

LAW ON THE USE OF LANGUAGES

FAMILIARITY WITH THE LAW ON THE USE OF LANGUAGES

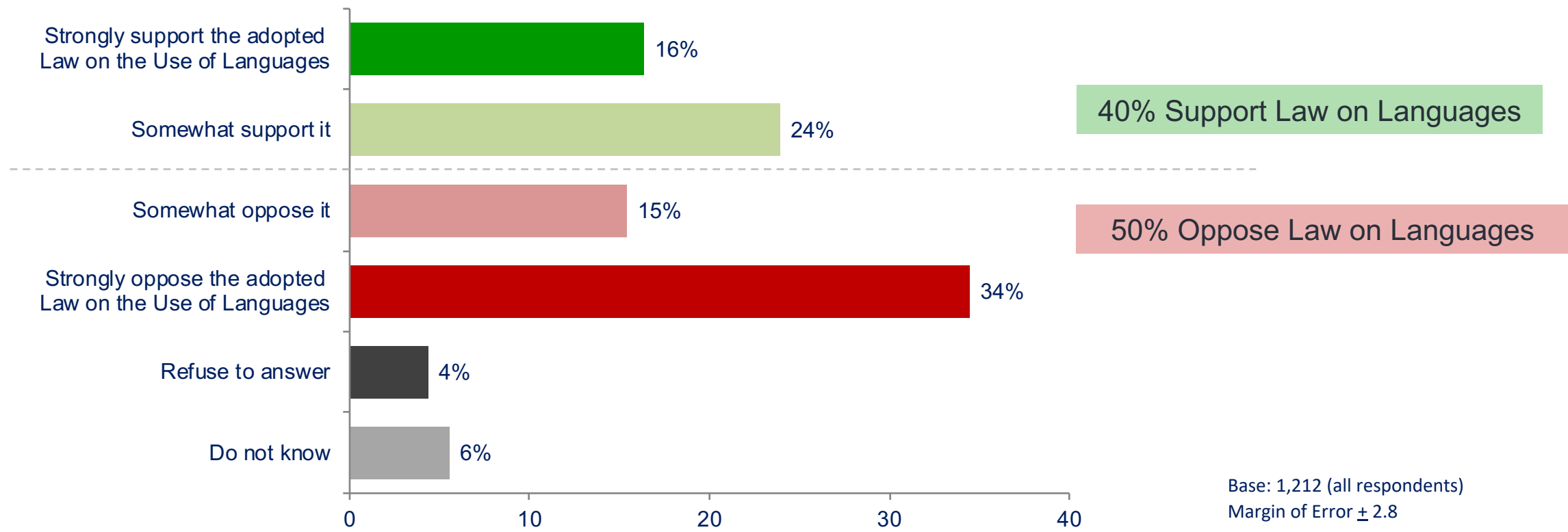
In 2019, our country adopted the Law on the Use of Languages. How familiar are you with the content of this law?



Base: 1,212 (all respondents)
Margin of Error ± 2.8

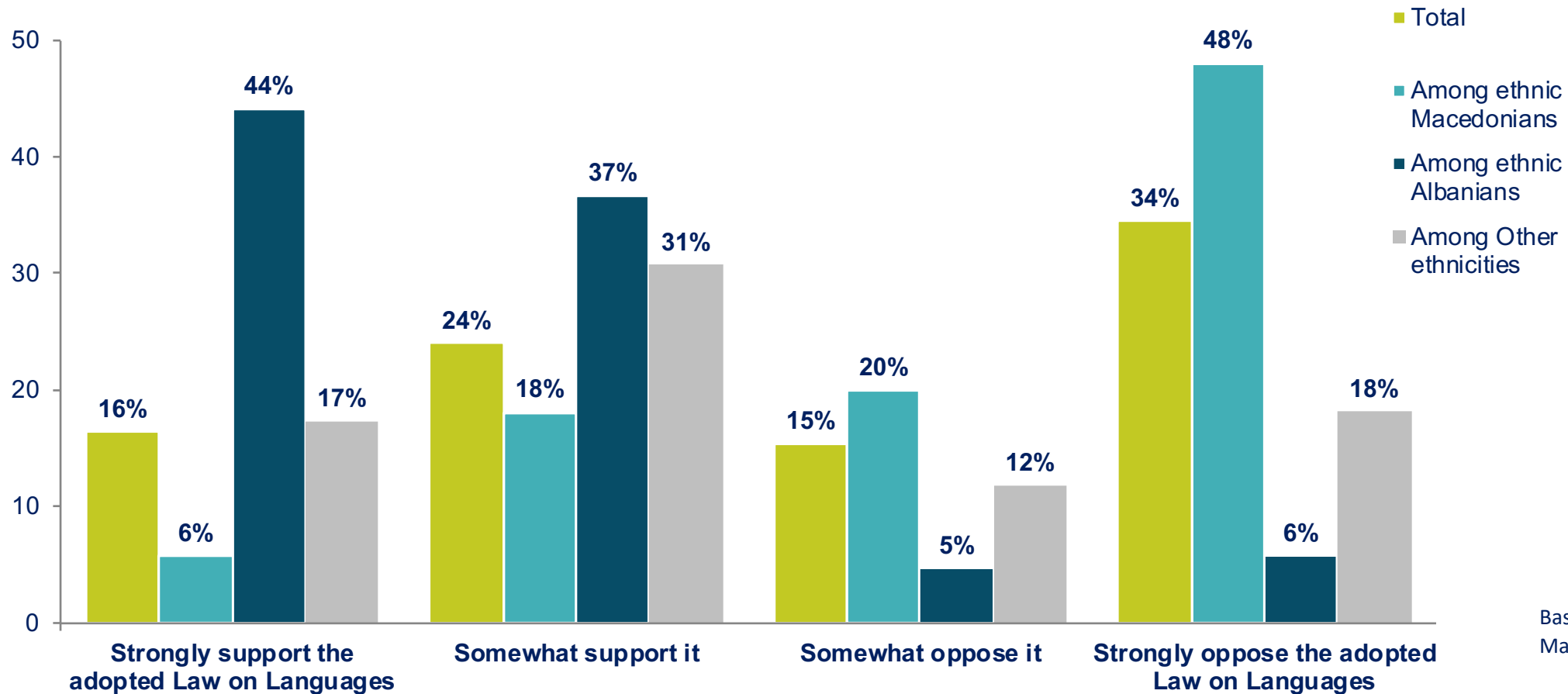
SUPPORT FOR THE LAW ON THE USE OF LANGUAGES

Do you...



SUPPORT FOR THE LAW ON THE USE OF LANGUAGES

Do you...



Base: 1,212 (all respondents)
Margin of Error ± 2.8

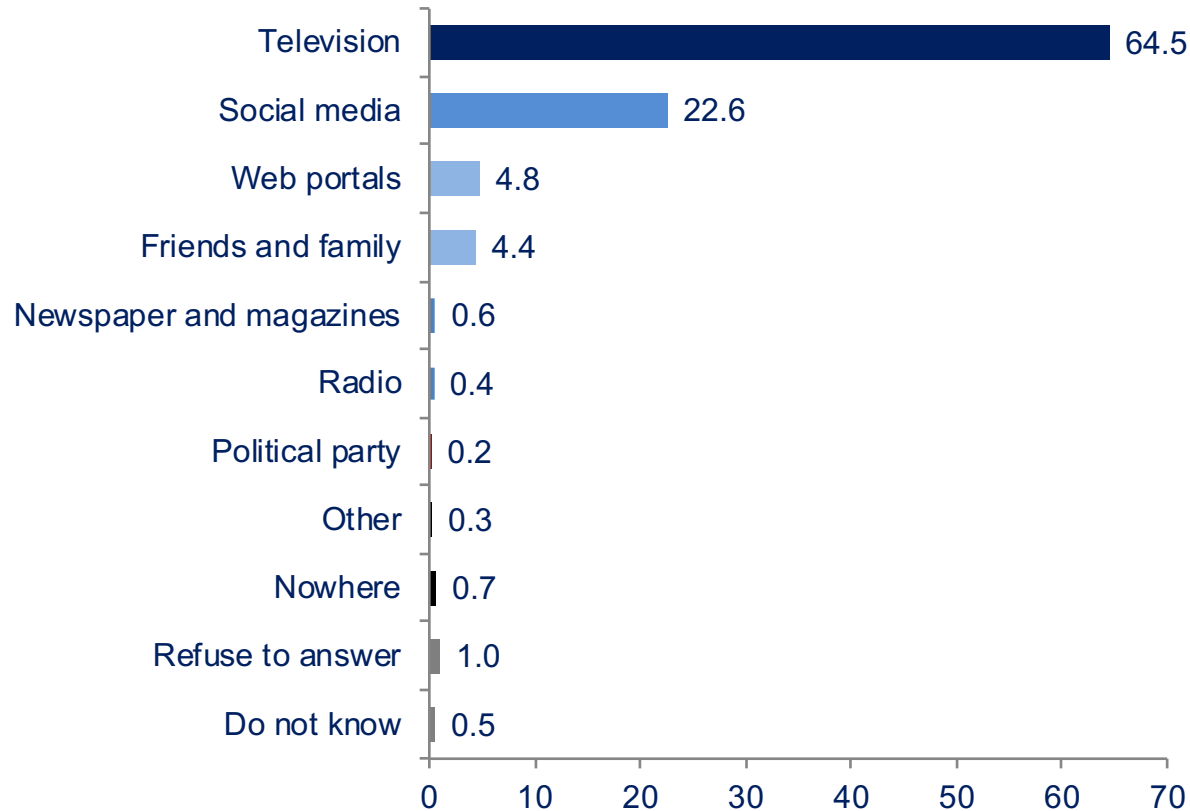
IX. MEDIA USAGE AND DISINFORMATION

MEDIA USAGE

What is your primary source of political news?

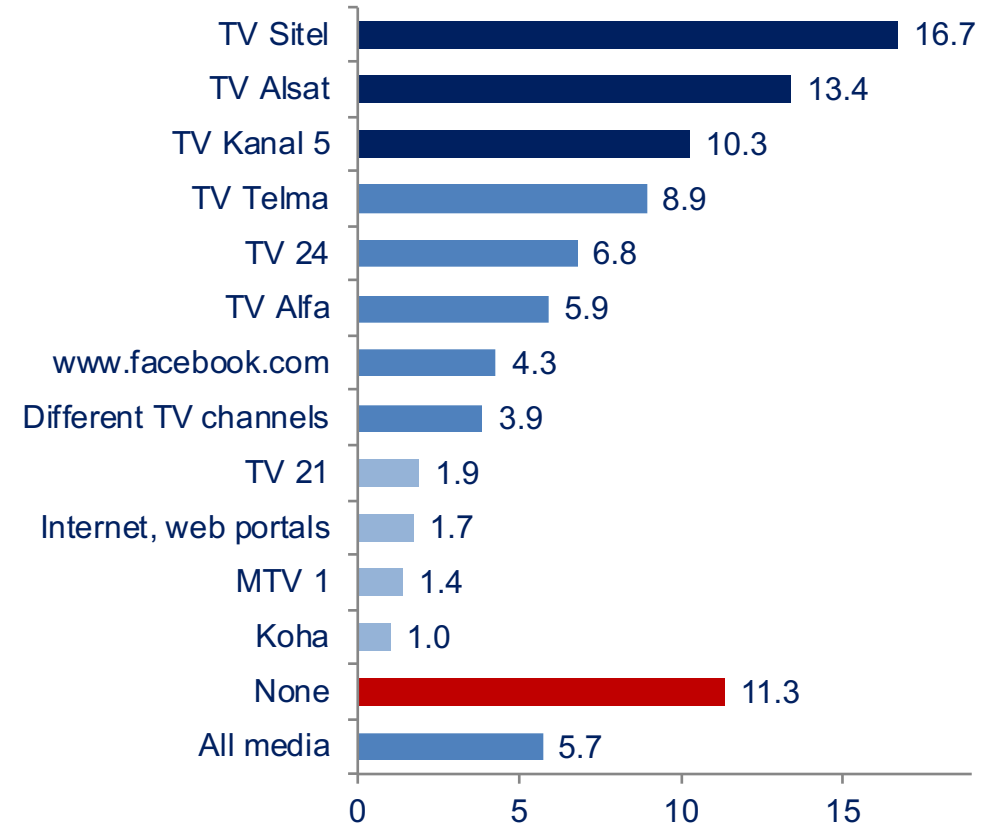
Which media do you trust the most as a source for political news?

Primary source of political news (%)



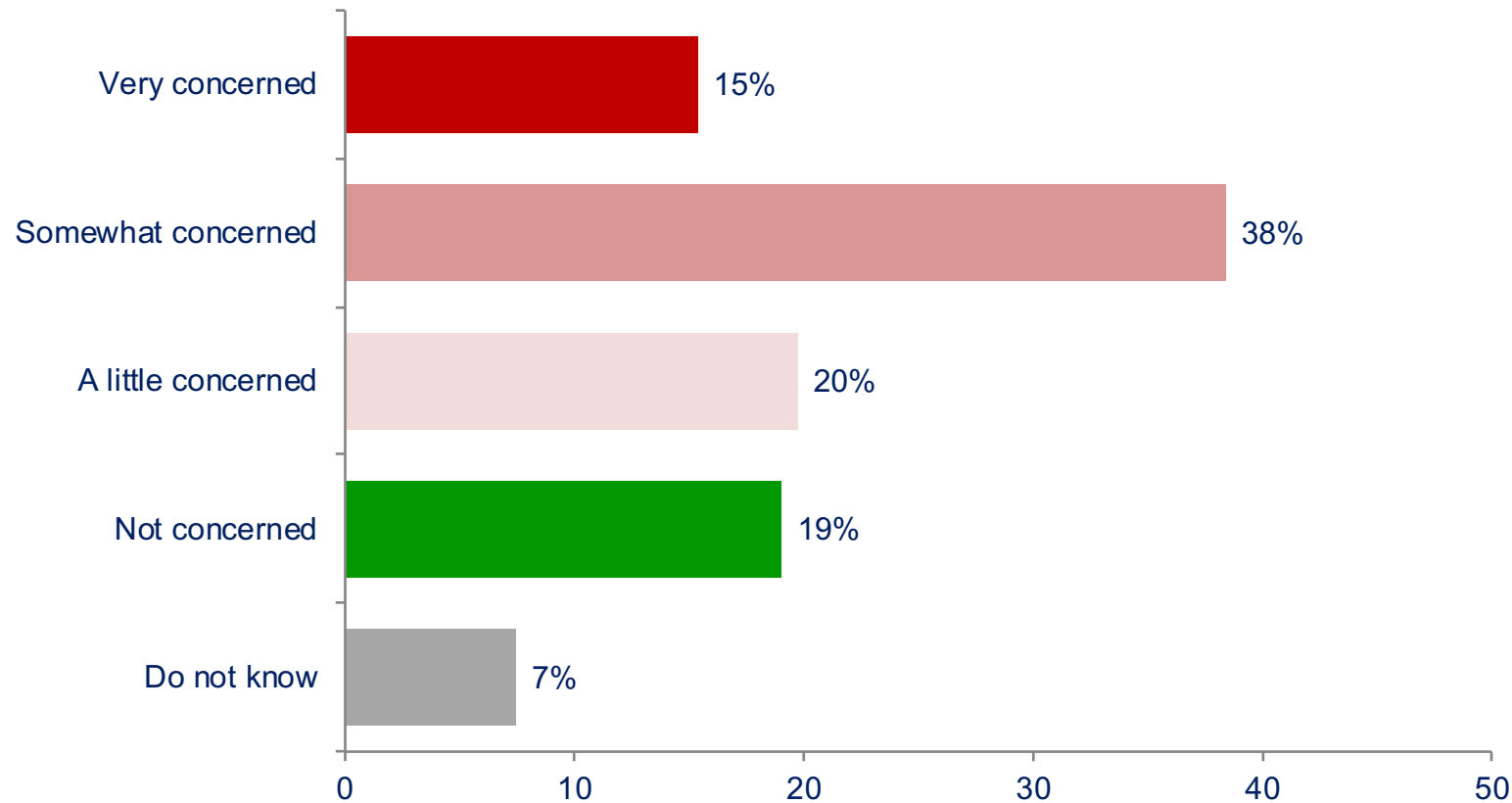
Base: 1212 (all respondents)
Margin of Error ± 2.8

Most trusted source (%)



CONCERN ABOUT DISINFORMATION

Some have suggested that disinformation related to the election has been spreading in our country. Disinformation is false information that is shared with an intent to cause harm. How concerned are you that disinformation might influence enough voters to impact the results of the parliamentary elections? Are you...



Base: 1212 (all respondents)
Margin of Error ± 2.8

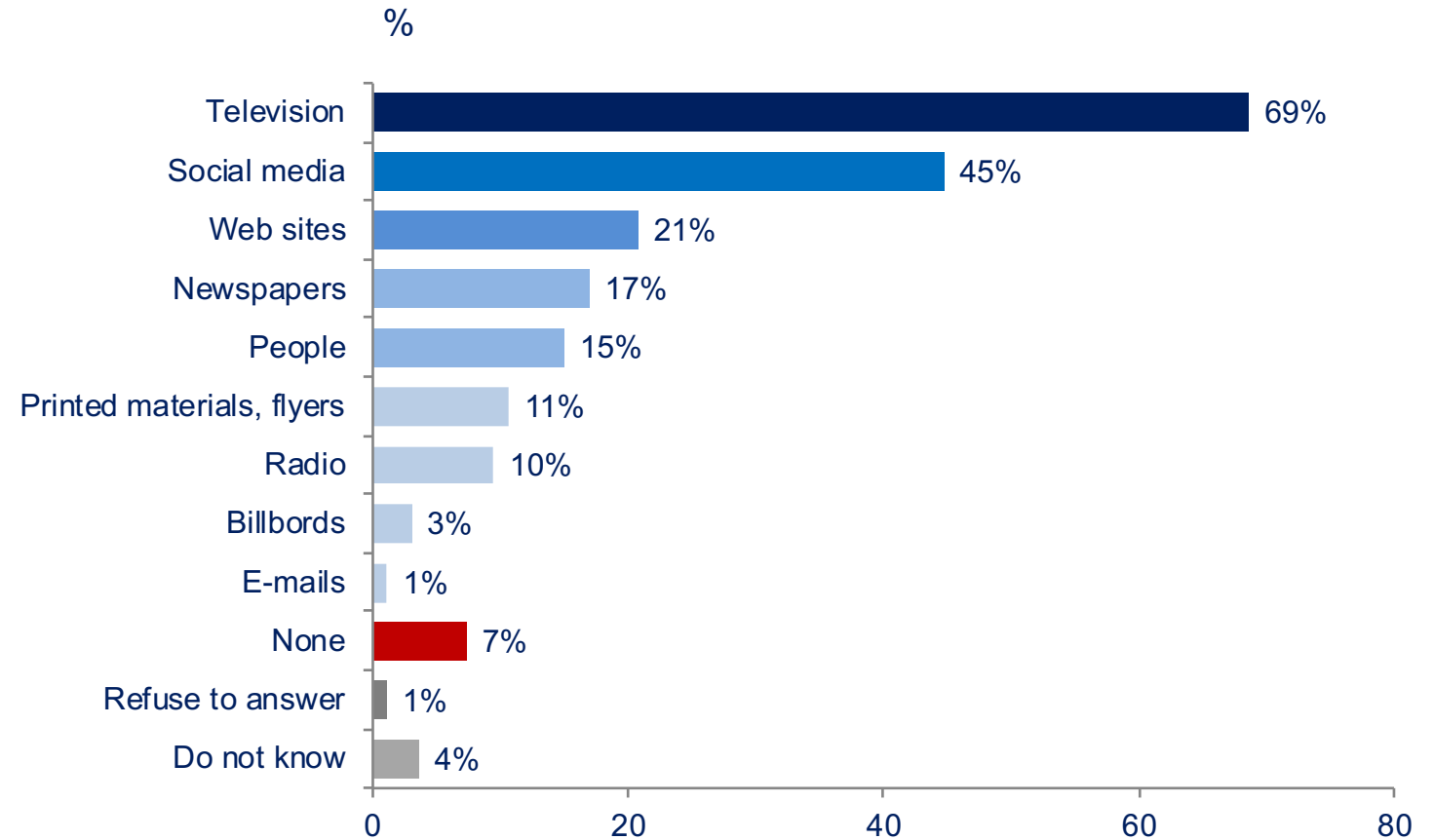
INCIDENCE AND LOCATION OF DISINFORMATION

Please tell me if you have been exposed to disinformation in these sources of information?

VOTERS EXPOSED TO DISINFORMATION



88%



Base: 1212 (all respondents)

Margin of Error ± 2.8

Disinformation

- Everywhere, especially the Internet
- Creates confusion
- Influential

Sources of disinformation

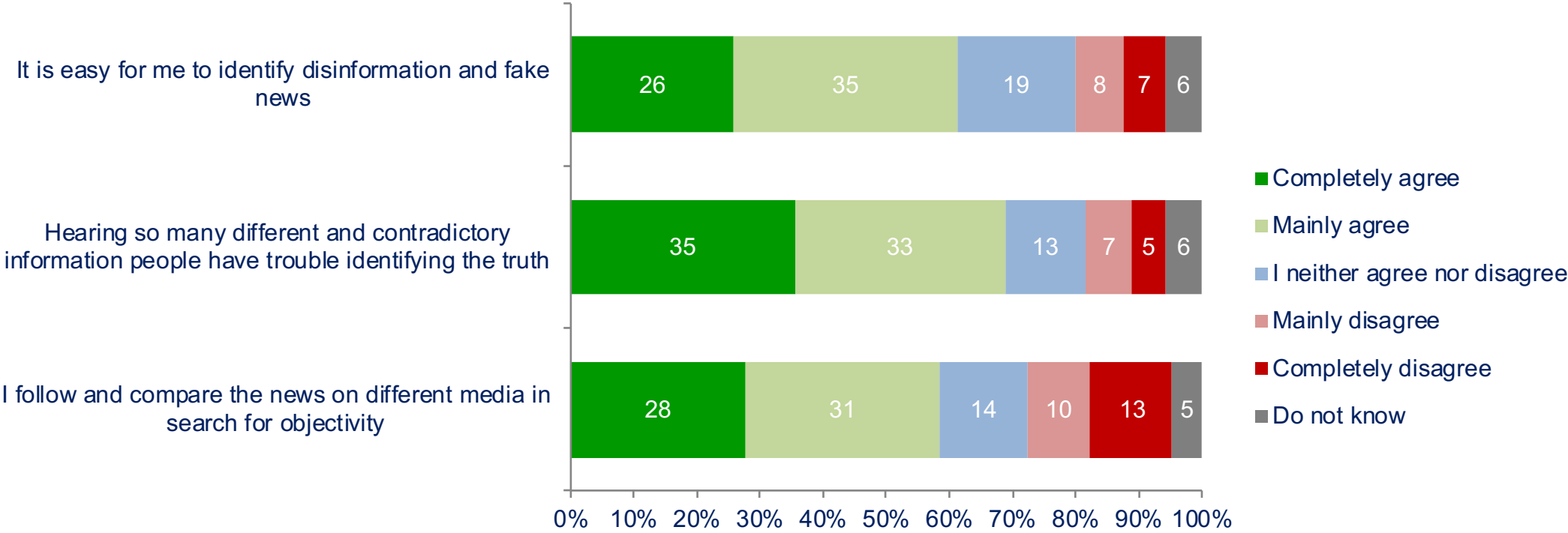
- The political parties
- The media, which likes exclusive news and exaggerate things, and spreads disinformation to get higher ratings

How they recognize disinformation

- The medium, by reputation
- Compare with other media
- Headlines
- Author / source of information
- Comments on social networks

PERSPECTIVES AND BEHAVIORS - DISINFORMATION

I am going to read to you some statements. For each, please tell me whether you agree or disagree?



Base: 1212 (all respondents)
Margin of Error \pm 2.8

X. YOUTH-ORIENTED PROGRAMS, EDUCATION, EMPLOYMENT AND MIGRATION

▪ Low awareness of programs for young people

Mentioned:

- ✓ Monthly reimbursement of 3000 denars for young people up to 23 who are employed in the production sector
- ✓ 20 000 euros initial investment in agriculture
- ✓ Financial motivation and scholarship for vocational schools
- ✓ Trainings for faster employment and supporting the companies to employ young people (Cooperation among the municipalities, the agency for employment and the business sector)
- ✓ Support for young entrepreneurs
- ✓ Youth guarantee



The situation in the education system

NO OVERSIGHT

- There is no quality and useful practical work
- There are no professionals
- There is no control over professors' performance
- Old-fashioned program, the modern movements and innovations are not followed
- Corruption, nepotism, connections
- Strong political influence in the educational facilities
- Low quality entrance standards
- Fast and easy diplomas from the dispersed and private universities
- Cambridge program is not working out

Improvement suggestions

FOCUS AND UPGRADE

- More frequent practical work of a good quality
- Orienting youth towards alternatives to higher education, such as vocational schools
- Higher criteria for enrolling at universities
- Up-to-date teaching program and implementation of computer technology during classes
- Compulsory involvement of a student advisor and a psychologist in schools
- Subsidies for students and students' employment agencies
- Some younger teachers

Employment problems

Not merit-based

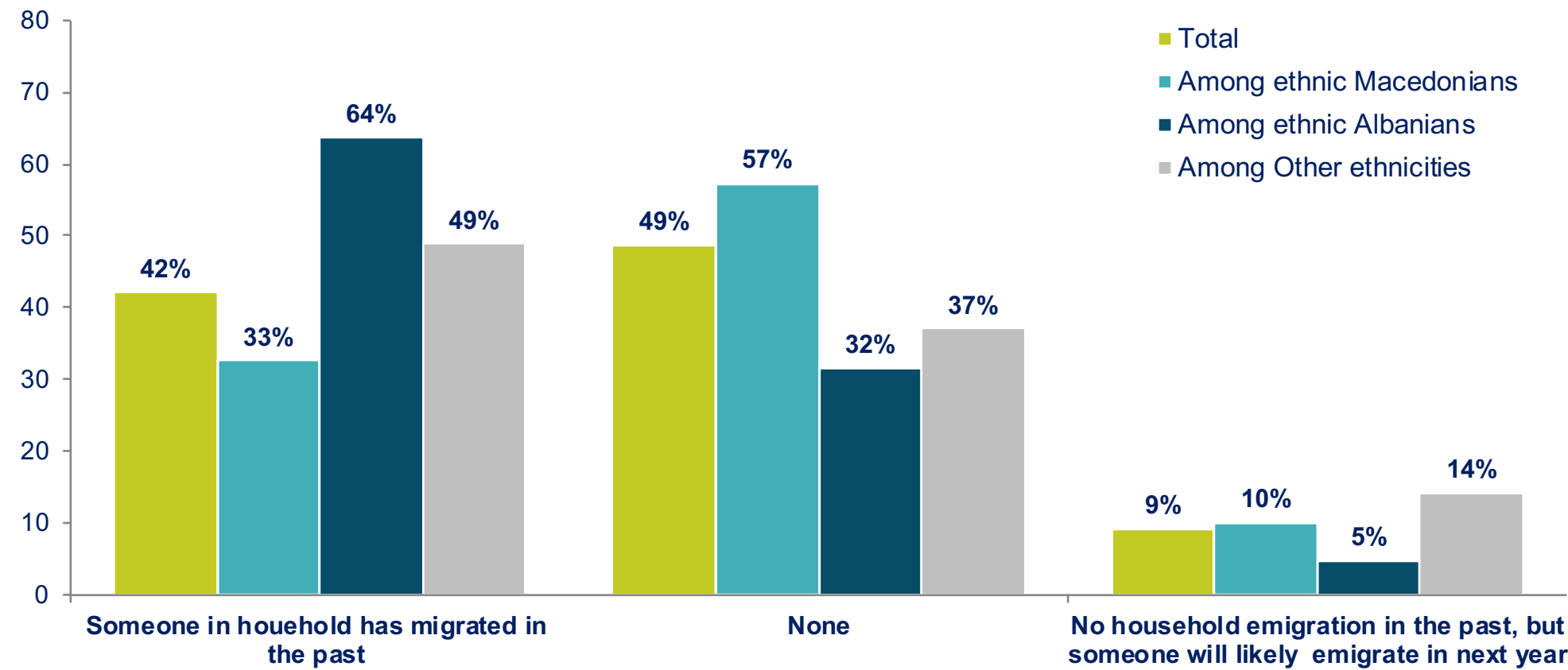
- Membership in a political party and nepotism
- The employers demand work experience
- The obtained education does not correspond to the demands of the labor market
- Inability to work in their field of study
- Low salaries
- Overtime hours, which are not paid
- Exploited

Work preferences

- Private sector, to avoid political pressure and blackmail
- Mainly large corporations with structure and rules
- Some prefer stability and less pressure in the public sector

MIGRATION

Is there any member of your household who has emigrated to live and/or work abroad?
Is there any member of your household who will likely emigrate to live and/or work abroad in the next year?



Base: 1212 (all respondents)
Margin of Error ± 2.8

Ready to leave

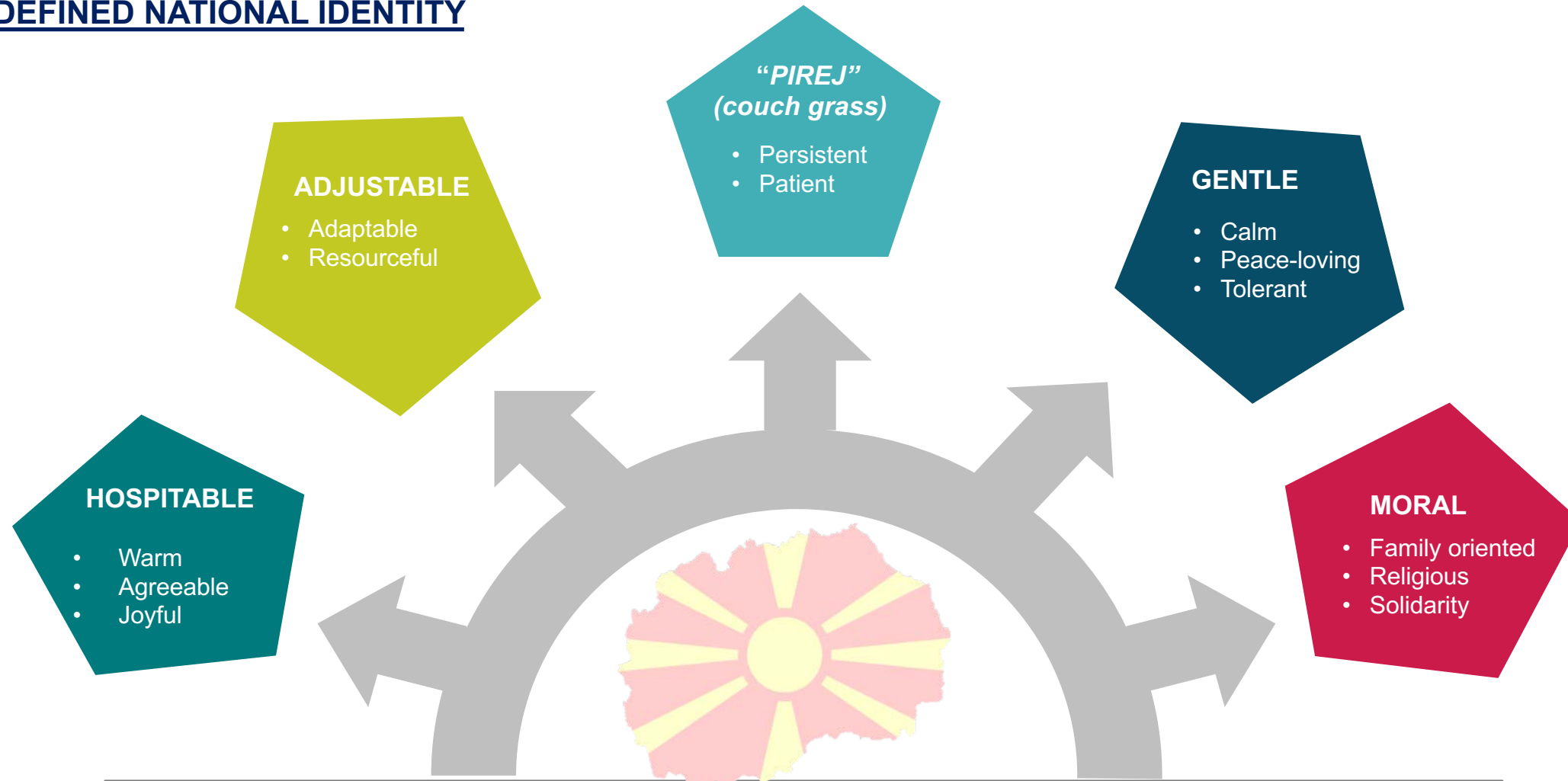
- Many plan to migrate to Europe
- Some are actively looking



What will make them stay

- Employment without nepotism and membership in a political party (merit-based)
- Improvement of the education system
- Opportunities in their fields of study
- Adequate salaries

UNDEFINED NATIONAL IDENTITY



- The participants found it extremely difficult to articulate the values that characterize us as people, something that is genuine for us and makes us proud

XI. KEY FINDINGS

KEY FINDINGS - LANDSCAPE

- **NO PROGRESS**: There is a general sense the country is in a stagnant holding pattern, with an equal percentage of voters seeing the country as heading in the right direction (30%) as in the wrong direction (33%) – with one in three (35%) seeing things as neutral, heading in neither direction.
- **SLIGHT NET IMPROVEMENT**: There are indications of slight broad improvements, a modest net overall positive measure. One in three citizens of North Macedonia (32%) said people's lives have improved in the past three years, a plurality said the country's people have been stuck in place (42%) and one in four (24%) felt things have gotten worse.
- **ANGER AT JUDICIAL SHORTCOMINGS AND ROLE THE POLITICAL PARTIES HAVE PLAYED IN CREATING THE PROBLEM AND NOT FIXING IT**: The voters' most serious national concerns are in reducing corruption and organized crime in conjunction with improving the judicial system. This is consistent with the very high levels of zero-level trust people have in the court system (48% have no trust at all, 70% have little to no trust, compared to 12% expressing trust), the public prosecutor's office (41% no trust at all, 62% little or no trust and 16% do trust them). Undecided voters explained in focus groups that all political parties are to blame for this. Moreover, given the EU failed to move accession forward after the hard-fought Prespa Agreement, there is a sense these reforms have an added importance that cannot wait.
- **KEEP AN EYE ON THE ECONOMY TOO**: Economic issues remain a key issue with 35% citing it as a top concern (economy, employment, standard of living).
- **MIGRATION**: Failed judicial reforms, modest at best economic improvement, and a sense of too much intrusion by political parties, among other factors, contribute to continued migration. More than four in ten households (42%) have seen a family member emigrate, and one in ten (9%) households, who have not seen a family member emigrate in the past, indicate it is likely someone will migrate in the coming year.
- **DAMPENED INTEREST IN VOTING**: Heading into the election, undecided voters in focus groups expressed lowered interest in voting, citing a range of concerns including a belief the elections are wasteful, creates divisions and only benefits corrupt politics.

KEY FINDINGS - TRUST IN INSTITUTIONS, JOB APPROVAL OF ELECTED OFFICIALS, FAVORABILITY OF POLITICAL PARTIES AND POLITICIANS

- Broadly, **all institutions, parties and politicians suffer from poor ratings**, with high levels in “bottom box” or “significantly negative” categories.
- **Some of the institutions or people were more tolerated than others:** Zoran Zaev has achieved some measure of national respect as he is viewed favorably by far more than other national political figures (38% favorable among ethnic Macedonians, 55% among ethnic Albanians and 56% among other ethnic minorities). To be clear, **there is significant polarization between ethnic Macedonian supporters of VMRO-DPMNE** (finding anything related to SDSM and ethnic Albanians very negatively) **and supporters of SDSM** (finding anything VMRO-DPMNE very negatively).
- Interestingly, **while ethnic Albanians will vote for their ethnic-based parties** they view their parties and leaders unfavorably and **have a net positive view of SDSM and Zoran Zaev.**

KEY FINDINGS - 2020 ELECTIONS

➤ 2020 ELECTIONS TURNOUT:

- **Three in four voters (76%) plans to vote, with 44% saying they will definitely vote.**
- **23% plan to vote for SDSM**, with 90% of them saying they would definitely vote for them and 10% might change their mind.
- **20% plan to vote for the VMRO-DPMNE Coalition**, with 94% certain and 6% possibly changing
- **7% plan to vote for DUI** (90% definitely), **6% for the Alliance for Albanians and Alternativa**, and **2% for BESA** (NOTE: the survey has already been in the field when the SDSM-BESA coalition was announced).
- **14% said they would not vote**, 14% refused to answer the question, 2% said they would invalidate their ballot and 11% said they were undecided.

(NOTE: Among ethnic Macedonians, 28% plan to vote from VMRO-DPMNE and 28% for SDSM).

➤ 2020 ELECTIONS – CONFIDENCE IN SYSTEM, DISINFORMATION

- There is **mild mistrust among voters** about the validity of the election. **Half (52%) are confident** the election will be conducted free and fairly, with 19% *very confident* and 33% *somewhat confident*. Four in ten voters (39%) have little confidence (21%) or no confidence (18%).
- There is **widespread disinformation (88% have been exposed to it)**, primarily through television (69%) and social media (45%). **Most blame domestic political groups, not external players**. Voters indicated they are becoming better consumers of news by looking critically at the information. **There is broad concern (54%) that the disinformation can impact the election**, but only 15% indicate they are *very concerned*.

KEY FINDINGS – POLITICAL PARTIES

➤ VMRO-DPMNE

- VMRO-DPMNE Favorability: Net -46, 18% favorable and 64% unfavorable, with 42% *very unfavorable*.
- Among undecided voters, **they appreciated their discipline, focus on economy and youth investments**, but were disappointed by their divisiveness and narrow focus.
- Hristijan Mickoski: Net -30, 25% favorable and 45% unfavorable.
- Among undecided voters, positive impressions include **having ideas and intelligence**, negatives center on lacking charisma and acting on behalf of the ex leader in the party.

➤ SDSM

- SDSM Favorability: Net -9, 41% favorable and 50% unfavorable, with 36% *very unfavorable*.
- Undecided voters **appreciated their push for Western alignment and inclusiveness** but were disappointed by their failure on the promised Rule of Law changes and are seen as equally corrupt as other parties.
- Zoran Zaev: Net +5, with 44% favorable and 49% unfavorable.
- Among undecided voters, positive impressions are his **vision, persuasiveness and commitment to the EU direction**. On the negative side, he is viewed as untrustworthy, impulsive and naïve.

KEY FINDINGS – ETHNIC ALBANIAN PARTIES

➤ DUI

- DUI Favorability: Net -58, 16% favorable and 74% unfavorable, with 58% *very unfavorable*; among ethnic Albanians, 37% favorable and 54% unfavorable.
- Ali Ahmeti: Net -58, 16% favorable and 74% unfavorable, including 38% favorable and 54% unfavorable among ethnic Albanians.
- Among undecided voters, he is viewed positively as a charismatic leader, but negatively as self-absorbed and elements related to corruption, disloyalty, and untrustworthiness

➤ The Coalition Alliance for Albanians and Alternativa

- The Coalition Alliance for Albanians and Alternativa Favorability: Net -52, 17% favorable and 69% unfavorable, with 54% *very unfavorable*; among ethnic Albanians, 45% favorable and 46% unfavorable.
- Zijadin Sela: Net -54, 17% favorable and 71% unfavorable, including 47% favorable and 45% unfavorable among ethnic Albanians.
- Among undecided voters, he is viewed positively as **charismatic and having potential**; negative impressions were that he is radical and lacks a clear vision.
- Afrim Gashi: Net -59, 11% favorable and 70% unfavorable, including 26% favorable and 59% unfavorable among ethnic Albanians.
- Among undecided voters, he is **not well known among ethnic Macedonians**, but among Albanians was an awareness that he is **young and well educated**.

➤ Movement BESA

- Movement BESA Favorability: Net -54, 16% favorable and 70% unfavorable, with 55% *very unfavorable*; among ethnic Albanians, 30% favorable and 60% unfavorable
- Bilal Kasami: Net -54, 15% favorable and 69% unfavorable, including 28% favorable and 61% unfavorable among ethnic Albanians.
- Among undecided voters, he was **mostly unknown to ethnic Macedonians**, but among ethnic Albanians, he is viewed positively as a **technocrat with a European-style approach**; others see him as ambitious.

KEY FINDINGS – EU ACCESSION

- **Citizens remain strongly supportive of North Macedonia joining the EU.** More than eight in ten citizens of North Macedonia (82%) supports joining the EU, and nearly six in ten (57%) strongly support this move.
- Observers should keep an eye on **slight fallout from the events of the past two years** – notable from the rough and tumble politics of passing the Prespa Agreement and the EU decision in Fall 2019 that delayed accession talks.
 - One in three citizens of North Macedonia (32%) outright support the Prespa Agreement; among the majority ethnic Macedonians, this support drops to 17%.
 - One in four (26%) support the agreement for its necessity, including 31% of ethnic Macedonians. So, a majority of citizens (58%) along with half of ethnic Macedonians (48%), are supportive of the Prespa Agreement. Three in ten (31%) citizens of North Macedonia opposes the Prespa Agreement, including 43% of ethnic Macedonians.
 - Four in ten (41%) can see past the EU delay and have no interest in exploring other alliances.
 - Nearly two in ten (18%), feel some trust with the EU was broken, remain supportive of EU accession, but are open to looking for alternative long-term strategies.
 - Two in ten (20%) feel the EU is turning away and North Macedonia should consider alternatives.
- **Half of the citizens of North Macedonia see a Westward orientation** as the best direction for their country (26% to the EU, 17% to the U.S. 6% NATO). One in five (22%) believe that no one helps their country's national interests, 18%, look to the East, primarily Turkey (11%) and Russia (5%).
- Undecided voters expressed that the **EU delay raised awareness that their country must complete more reforms to become a genuinely qualified candidate.** There was an increase in resolve to accomplish reforms.

KEY FINDINGS – JUDICIARY, RULE OF LAW, LIMITING CORRUPTION

- **Perceptions of Rule of Law and efforts to limit corruption are extremely negative.** Two in three (65%) are dissatisfied on the current levels of Rule of Law (41% very dissatisfied) and seven in ten are dissatisfied with efforts to limit corruption (47% very dissatisfied).

Moreover, undecided voters assigned blame to all political parties.

- **The newly formed Law on Public Prosecution started with a neutral impression,** with 34% agreeing it will lead to Special Prosecution cases being pursued, 33% neutral or undecided and 32% disagreeing.
- **Corruption** is perceived as a deep-seeded issue, as eight in ten voters (80%), agree that bribery and corruption are “a characteristics of our culture” - and half, 52%, agree with this completely. “
- **There is evidence people might be open to strong anti-corruption actions,** as 90% agree (and 74% completely agree) “punishments for corruptions should be more sever.”

KEY FINDINGS – FREEDOM OF PRESS AND SPEECH

- **There is a sense the country has made progress increasing the freedom of press and speech**, with more citizens satisfied with the current levels of freedom (64%) than dissatisfied (31%).
- Four in ten (39%) said freedom of expression have improved over the past three years.
- Undecided voters indicated that while press freedom has increased, given the extreme political influences and tight economy, **there are still concerns with identifying trustworthy independent news.**
- The predominant source of political news is television (65% cite as their primary source), and **no singular station is trusted most.**

