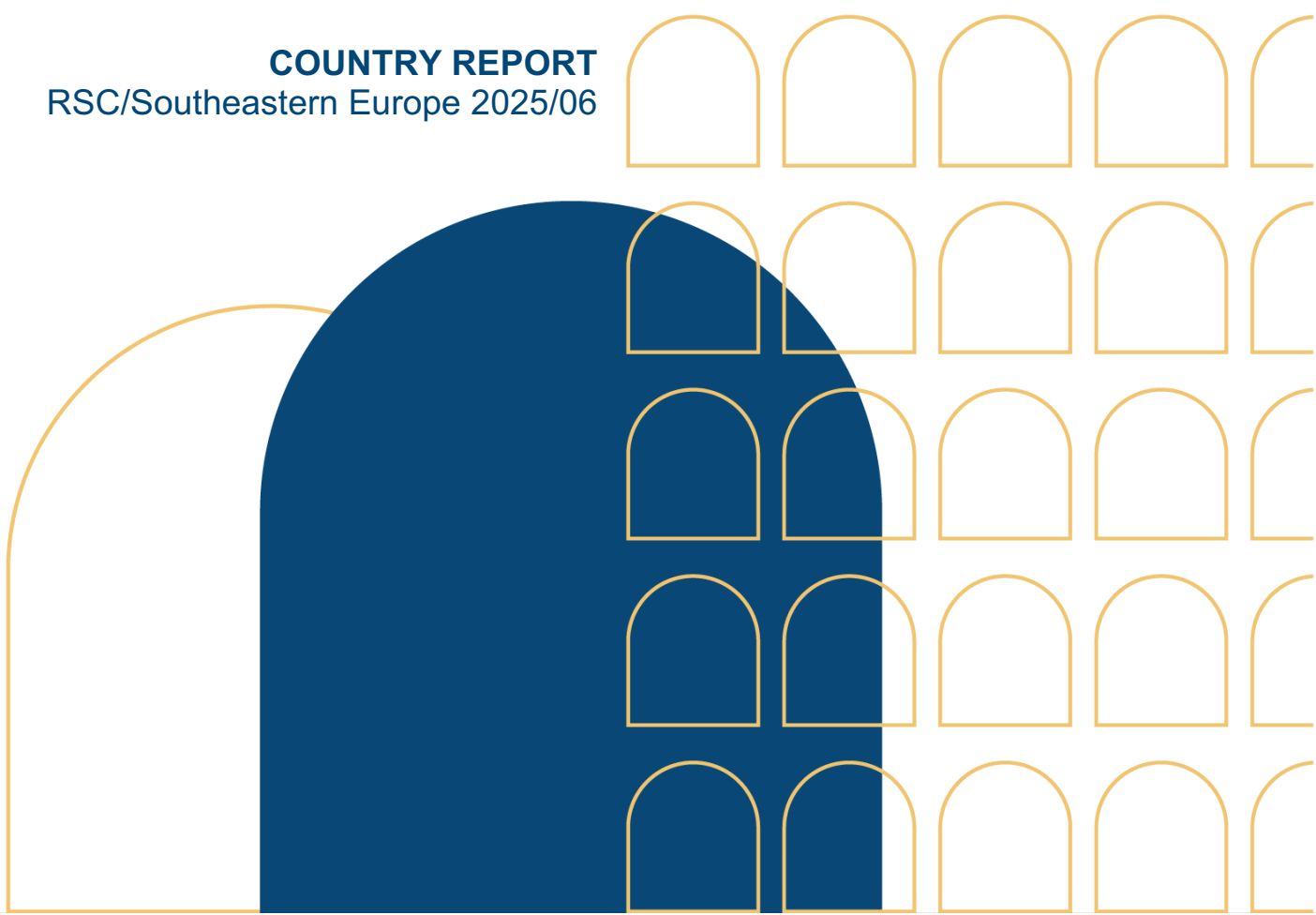


The (Geo)Politics of Democracy in North Macedonia

Simonida Kacarska

COUNTRY REPORT
RSC/Southeastern Europe 2025/06



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Robert Schuman Centre for Advanced Studies
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The (Geo)Politics of Democracy in North Macedonia

Simonida Kacarska¹

1. Introduction

(North) Macedonia was a frontrunner in both the NATO and EU accession processes in the Western Balkans, with steady democratic progress during the first decade of the twenty-first century. The country began its EU accession journey in the early 2000s, alongside the introduction of extensive power-sharing among the two major ethnic groups in the country, a process largely supported by the EU and the United States (US). At the same time, the country became a candidate for NATO membership in 1999 and was set to join the alliance alongside Albania and Croatia in 2008. However, its early progress was halted in 2008–2009 due to bilateral disputes with neighbouring countries, followed by severe democratic backsliding. Over the next decade, while Greece continued to block Macedonia's accession to NATO and stalled progress in the EU accession negotiations, conditions worsened internally, leading to state capture and increased engagement from other geopolitical actors. An agreement with Greece on renaming the country to North Macedonia eventually paved the way for NATO membership, which was formally achieved in 2020.

Although anticipated, the agreement with Greece did not result in the start of EU membership negotiations due to France's request for a revision of the EU accession methodology in 2019, followed by an additional veto from Bulgaria in 2020, linked to historical and identity-related disputes. While EU accession negotiations were formally launched in July 2022, progress now depends on North Macedonia adopting constitutional amendments in line with Bulgaria's demands. The mid-2024 elections brought a conservative government to power, which opposes this requirement while maintaining the country's pro-European stance. The new government has cultivated a close partnership with the Hungarian prime minister Viktor Orbán and is keen to prioritise relations with the Donald Trump administration in the US, raising concerns about the country's short- and medium-term political trajectory.

The bilateral disputes have disrupted North Macedonia's two-decade-long accession and democratisation process, creating a power vacuum that has undermined the EU's role as the most significant external actor. This vacuum, in turn, has provided fertile ground for the engagement of other external actors in the country. While many analyses have focused on North Macedonia's difficult Europeanisation process and its power-sharing arrangements, the relationship between democratic decline and geopolitics has often been overlooked. This

¹ Simonida Kacarska is Director of the European Policy Institute in Skopje. She holds a PhD in Politics and International Studies from the University of Leeds.

report examines how external geopolitical actors have shaped the trajectory of democratic development in the country. The analysis rests on the premise that, although the EU's official policy provides the strongest democratic conditionality, its effectiveness has been diminished by bilateral disputes and the conflicting interests of certain member states. Similarly, the US has positioned itself as a key geopolitical actor supporting North Macedonia's democratisation, while also directly intervening in domestic policymaking and governance. Despite this, the US has remained broadly supportive of the country's European integration. Other actors, including Türkiye, China, Russia, and, in the regional context, Serbia, have exploited the stagnation in the accession process to advance their own interests. The fundamental divide between the EU and US, on the one hand, and other geopolitical actors, on the other, lies in their stance on North Macedonia's EU accession prospects and, until recently, NATO membership.

The report is structured as follows: The next section discusses the state of democracy and institutional parameters in the country, focusing on how its democratic development has been approached in research. The third section identifies the key external actors present in the country and the strategies they pursue at global, regional, and local levels, where available. Section 4 examines the mechanisms, channels, and agents through which external actors exert their influence within the country. The following section analyses the outcomes of these engagements in North Macedonia. Lastly, the paper presents the key findings of the analysis.

2. Geopoliticising the State of Democracy

North Macedonia has been a NATO member state since 2020 and remains a candidate country for EU accession. Freedom House's Nations in Transit classifies it as a hybrid/transitional regime with a score of 3.79/ 7.² As in most Western Balkan countries, North Macedonia's democratic performance improved in the early 2000s, only to decline from 2010 onward, followed by a period stagnation. The country's ethnic diversity posed a challenge, particularly in the first decade of independence, which was marked by contested state- and nation-building processes, including a brief armed conflict.³ With the signing of the Ohrid Framework Agreement (OFA) in 2001, an extensive power-sharing system was introduced between the Macedonian and Albanian communities, the two largest ethnic groups.⁴ The EU and NATO played a pivotal role in the agreement, acting not only as mediators in the conflict, but also as signatories. As a result, the management of the inter-ethnic relations and the implementation of the OFA have always been closely linked to North Macedonia's EU and NATO integration. Nonetheless, the concepts of statehood and national identity remain contested, both internally and externally.⁵

² Freedom House, *North Macedonia: Nations in Transit 2024 Country Report* (Washington, DC: Freedom House, 2024), by Ognen Angelov, <https://freedomhouse.org/country/north-macedonia/nations-transit/2024>

³ Ulf Brunnbauer, "The Implementation of the Ohrid Agreement: Ethnic Macedonian Resentments," *Journal on Ethnopolitics and Minority Issues in Europe* 1 (2002), <http://www.ecmi.de/fileadmin/downloads/publications/JEMIE/2002/nr1/Focus1-2002Brunnbauer.pdf>.

⁴ Florian Bieber, "Power Sharing and the Implementation of the Ohrid Framework Agreement," in *Power Sharing and the Implementation of the Ohrid Framework Agreement*, ed. Stefan Dehnert and Rizvan Sulejmani (Skopje: Friedrich Ebert Stiftung - Office Macedonia, 2008), www.fes.org.mk/pdf/OFA_english.pdf.

⁵ Cvete Koneska, Adnan Huskić, and Gëzim Krasniqi, "Macedonia, Bosnia and Kosovo: Contested Statehood and the EU," *Journal of Intervention and Statebuilding* 17, no. 2 (March 2023): 173–91, <https://doi.org/10.1080/17502977.2022.2086390>.

In the first decade of the twenty-first century, Macedonia was the first country to sign a Stabilisation and Association Agreement with the EU and, together with Croatia, to obtain candidate status in 2005. During this period, it was a frontrunner in European accession and democratic transformation in the region. The country made significant advancements in terms of reforming internally for the purpose of obtaining its strategic goals of EU and NATO membership. Yet, in 2008, although formally prepared for NATO admission, the country was vetoed by Greece and remained outside the alliance for the next 12 years. In 2009, the veto was also extended to EU membership talks, which Greece effectively blocked for the ensuing decade. This prolonged limbo in NATO membership was marked by significant democratic backsliding, culminating in a major political crisis in 2015–2016.⁶ As in many other instances throughout its history of independence, the political crisis was resolved through EU and US intervention, leading to government change⁷ and, ultimately, a resolution of the name dispute with Greece, which paved the way for NATO membership in 2020. The EU accession path, however, faced new obstacles from 2020 onward due to an additional veto from Bulgaria, which has since continued to obstruct North Macedonia's progress toward EU accession.

With this trajectory, scholarly literature has examined the case of North Macedonia through several analytical frameworks, including democratisation and democratic consolidation, often in combination with theories of nation-building in post-communism conditions.⁸ In most academic studies, North Macedonia is analysed as a divided society with significant uncertainty over the prospects of its democratic consolidation. At the same time, the country has been examined through the lens on power-sharing agreements and post-conflict settlements. Given the role of the EU and NATO as guarantors and signatories of the Ohrid Framework Agreement, much of the research on power-sharing agreements focuses on North Macedonia's case, often considering the EU as an active player or as a framework for Europeanisation.⁹

Additionally, theories of (failed) Europeanisation have often been used to analyse North Macedonia's transformation, with particular emphasis on the role of bilateral disputes as intervening variables in the EU accession process.¹⁰ These studies offer several key insights. First, research on EU approximation suggests that North Macedonia has been a relatively positive case of formal EU alignment, illustrating the potential impact of EU engagement in the country.¹¹ Second, theories of state capture have been used to examine the decade of stagnation under the Greek veto, during which, the influence of other geopolitical actors

⁶ Simonida Kacarska, "Reinforcing or Conflicting? European Union Conditionality and Political Socialisation During the 2015–2017 Macedonian Political Crisis," in *Integrating the Western Balkans into the EU: Overcoming Mutual Misperceptions*, ed. Milica Uvalić (Cham: Springer Nature Switzerland, 2023), 375–97, https://doi.org/10.1007/978-3-031-32205-1_17.

⁷ Ibid.

⁸ Cvete Koneska, *After Ethnic Conflict: Policy-Making in Post-Conflict Bosnia and Herzegovina and Macedonia* (Routledge, 2016).

⁹ Michael Emerson and Gergana Noutcheva, "Europeanisation as a Gravity Model of Democratisation," *CEPS Working Document*, no. 214 (January 20, 2010), www.ceps.eu/files/book/1175.pdf.

¹⁰ Angelos Chrysosogelos and Elena Stavrevska, "The Prespa Agreement Between Greece and North Macedonia and the Discordancies of EU Foreign Policy," *European Foreign Affairs Review*, 2019, 427–46, <http://www.kluwerlawonline.com/api/Product/CitationPDFURL?file=Journals\EERR\EERR2019036.pdf>.

¹¹ Tobias Böhmelt and Tina Freyburg, "Forecasting Candidate States' Compliance with EU Accession Rules, 2017–2050," *Journal of European Public Policy* 25, no. 11 (November 2018): 1667–85, <https://doi.org/10.1080/13501763.2017.1348385>.

substantially increased.¹² As the first country where the European Commission began using the term ‘state capture’,¹³ North Macedonia has been regarded as a paradigmatic example of severe democratic regression, often compared to Hungary.¹⁴

Overall, North Macedonia has been studied through analytical frameworks focusing on internal democratic transformation as well as the process of Europeanisation, with less attention given to the role of external actors in its development trajectory. Yet, stagnation in the EU accession process has created fertile ground for the active engagement of other geopolitical powers, both from within and beyond the region. This analysis, in turn, examines the strategies employed by global and regional power players in North Macedonia to assess the state of the country’s democracy.

3. Identifying the Geopolitical Actors

While the EU and US have been the most significant geopolitical actors in North Macedonia, the protracted membership process in these organisations has created opportunities for the engagement of other geopolitical actors. While the EU and US mechanisms primarily support North Macedonia’s EU accession, other actors have exploited the vacuum created by the delays in the accession process. These include, at the regional level, Serbia, as well as Russia, China, and Türkiye, which have a longstanding presence in the region and are discussed below.

The EU is the key external actor present in and of relevance for North Macedonia.¹⁵ As a result of its long-term EU integration process, North Macedonia has the strongest economic ties with the EU, with more than 75 per cent of its trade conducted with EU member states.¹⁶ The EU serves as a framework for integration through its mechanism of conditionality and has by far the most significant influence in the country. North Macedonia’s relationship with the EU is political, as a candidate country negotiating accession, economic, through trade, and societal, given the public’s strong support for EU accession. Despite the cumbersome process of European integration, around 60 per cent of the population remains highly supportive of EU membership.¹⁷ While public support once exceeded 90 per cent, multiple vetoes and prolonged accession delays have diminished enthusiasm for EU accession.

¹² Simonida Kacarska, “Freeing the Captured State in Macedonia: What Role for EU Accession?” (Freedom House, November 2017), https://freedomhouse.org/sites/default/files/2020-02/122017_Macedonia_Brief_Final.pdf.

¹³ European Commission, *Recommendations of the Senior Experts’ Group on Systemic Rule of Law Issues in the Former Yugoslav Republic of Macedonia* (Brussels: European Commission, June 19, 2015), https://www.ecoi.net/en/file/local/1420776/1226_1514885605_20150619-recommendations-of-the-senior-experts-group.pdf

¹⁴ Kiran Rose Auerbach and Jennifer Kartner, “How Do Political Parties Capture New Democracies? Hungary and North Macedonia in Comparison,” *East European Politics and Societies* 37, no. 2 (2023): 538–62.

¹⁵ Also confirmed by Zoran Nechev and Ivan Nikolovski, “North Macedonia: A Fertile Ground for External Influences,” in *The Western Balkans in the World* (Routledge, 2019), 126–45.

¹⁶ See Council of the European Union, Infographics EU and Western Balkans intertwined, 2018 <https://www.consilium.europa.eu/en/infographics/western-balkans-economy/>

¹⁷ Ivan Damjanovski, “Analysis of Public Opinion on North Macedonia’s Accession to the European Union (2014-2023),” December 2023, <https://idscs.org.mk/wp-content/uploads/2023/12/B5-Public-Opinion-Analysis-Paper-No.-27-2023-WEB.pdf>.

In addition to the formal position of the EU as a framework for accession, several of its member states are key actors that have individually affected the democratic development of North Macedonia, such as Hungary. On the one hand, formally Hungary has for more than a decade seconded experts to the EU and/or foreign affairs ministries in the region to assist with the accession process.¹⁸ Yet, its most significant role is one of exporter of the model of illiberalism, directly undermining the transformation processes needed for EU accession. Hungary has played a significant role by positioning itself as a partner/supporter of North Macedonia, most prominently during the 2015 refugee crisis in the EU. With North Macedonia situated on the migration route, Hungary positioned itself as a supporter of the government, which was embroiled in a major wiretapping scandal and accused human rights violations at the time (2015/2016). Subsequently, Hungary granted political asylum to the country's convicted former prime minister. As such, Hungary effectively undermined the credibility of the EU's actions, despite its position as an EU member state.

While Serbia has widely been considered the key partner of Hungary in the Western Balkans region¹⁹, after the 2024 government transition in North Macedonia, Prime Minister Orbán has been working to rebuild his relationship with the new leadership in North Macedonia. Only days after the parliamentary elections, Hungary provided a loan of EUR 500 million to North Macedonia as a strategic economic partnership.²⁰ At a joint government session held in the summer of 2024, Orbán praised the "special economic relationship" with North Macedonia while reiterating the country's importance on the migration route. "*Without them [Macedonian government], we might not have been able to stop this migration invasion,*" he said, noting that Hungary had sent border patrol officers to Macedonia's southern border.²¹ The funds from the loan were disbursed to municipalities within a short period of time,²² primarily benefiting mayors from the governing coalition ahead of the local elections scheduled to take place in the autumn of 2025.

Beyond the EU, the United States has been the key factor affecting the development of North Macedonia since its independence. The US, primarily through NATO, was instrumental in ending the 2001 conflict and has been a key supporter of North Macedonia's future EU membership. Following the 2008 Greek veto on Macedonia's membership in NATO, a Declaration on Strategic Partnership and Cooperation was signed between the United States and Macedonia, emphasising the commitment of both sides to Macedonia's integration into NATO and the EU. The US remains a significant development donor to North Macedonia in addition to being the main strategic partner in NATO. In 2023, the US and North Macedonia signed a 10-year roadmap for defence cooperation.²³ Following the election of Donald Trump

¹⁸ Hungarian Government, Ministry of Foreign Affairs and Trade, "Hungary is doing everything to facilitate the EU accession of the Western Balkan countries", 30 July 2020, <https://2015-2019.kormany.hu/en/ministry-of-foreign-affairs-and-trade/news/hungary-is-doing-everything-to-facilitate-the-eu-accession-of-the-western-balkan-countries>.

¹⁹ Srđan Cvijić et al., "Balkan Csárdás: Hungarian Foreign Policy Dance" (Belgrade Center for Security Policy, 2023), <https://bezbednost.org/wp-content/uploads/2023/05/hungary-ENG-06-1.pdf>.

²⁰ Siniša Jakov Marusic, "North Macedonia Opposition Condemns Loan from Hungary," *BIRN*, July 12, 2024, <https://balkaninsight.com/2024/07/12/north-macedonia-opposition-condemns-loan-from-hungary/>.

²¹ "PM Orbán from North Macedonia: Hungary will be winner in coming decade," *Daily News Hungary*, 27 September 2024, <https://dailynewshungary.com/orban-in-north-macedonia-turmp-migration/>

²² "North Macedonia signs 500 MLN euro deal with Hungary," *See News*, 08 October 2024, <https://seenews.com/news/n-macedonia-signs-500-mln-euro-loan-deal-with-hungary-1264626>

²³ U.S. Department of Defense, "U.S., North Macedonia Defense Officials Hold Bilateral Talks, Lay Out 10-Year Roadmap," by Joseph Clark, June 6, 2023, <https://www.defense.gov/News/News->

as US president at the end of 2024, the government of North Macedonia has prioritised strengthening its relationship with the US.²⁴ This decision may have implications for the country's foreign policy orientation in the near future, especially if tensions arise between the EU and the US in the region.

In the Western Balkans region, Serbia has undoubtedly increased its influence as a geopolitical actor through its foreign, European, and regional policy. Although not commonly examined in the context of other external actors, Serbia has become an increasingly significant player in the Western Balkans region as the largest and most powerful actor with a distinct foreign policy that includes formal aspirations for EU membership whilst also maintaining strong cooperation with Russia and China. Serbia's growing influence in North Macedonia has been linked to regional alliances such as the Open Balkans initiative,²⁵ as well as its role during the COVID-19 crisis, when it provided vaccines and logistical support. The public perception of Serbia and its leadership has improved in North Macedonia, especially after the Bulgarian veto on EU accession.²⁶ According to the IRI Western Balkans poll in North Macedonia, 34 per cent of the population view Serbia as the country's closest ally, ahead of the US in second place with 17 per cent.²⁷

Türkiye holds historical ties with the Western Balkans and engages significantly in political and economic affairs. Specifically, regarding North Macedonia, Türkiye, due to its strained relations with Greece, among other reasons, has positioned itself as a supporter, including through military cooperation between the two countries, which dates back to the 1990s, particularly during the Greek embargo on Macedonia. Türkiye was a strong advocate for North Macedonia's accession to NATO and went as far as to request the usage of North Macedonia's original constitutional name in various official fora. North Macedonia also has an active Turkish minority, and as part of this, it has been a specific focus of Türkiye, receiving substantial financial assistance through the Turkish Cooperation and Coordination Agency.²⁸ In terms of investments, Türkiye holds a significant stake in the construction sector and also manages Skopje airport through TAV. Additionally, Türkiye has invested in educational institutions and the health sector.

While China has invested in various infrastructure projects in the Western Balkans, its direct impact on North Macedonia is comparatively minor. Two highways constitute the bulk of Chinese investments in the country, which were implemented by the Chinese Export-Import Bank with the Chinese Sinohydro corporation as the leading contractor, accompanied by

[Stories/Article/Article/3425566/us-north-macedonia-defense-officials-hold-bilateral-talks-lay-out-10-year-roadm/](#)

²⁴ Ivan Kolekevski, "Mucunski: Incoming US Administration an Important Event for Us, Deserved Attention Must Be Earned," *MIA*, 14 January 2025, <https://mia.mk/en/story/mucunski-incoming-us-administration-an-important-event-for-us-deserved-attention-must-be-earned>.

²⁵ Stefan Ristovski and Simonida Kacarska, "Caught in the Middle of It – Does Open Balkan Makes Sense for North Macedonia?," *Tirana Observatory*, January 23, 2023, <https://tiranaobservatory.com/2023/01/05/caught-in-the-middle-of-it-does-open-balkan-makes-sense-for-north-macedonia/>.

²⁶ An increasing number of the population considers that Serbia is the biggest friend of North Macedonia, see Harrison Weinberg, "IRI 2024 Western Balkans Poll" (International Republican Institute-IRI, May 2024), <https://www.iri.org/news/iri-2024-western-balkans-poll/>.

²⁷ Ibid.

²⁸ Faris Kočan and Jana Arbeiter, "Is TIKa Turkey's Platform for Development Cooperation or Something More?: Evidence from the Western Balkans," *International Journal of Euro-Mediterranean Studies* 12, no. 1 (2019): 167–93.

significant concerns over transparency and corruption.²⁹ In addition to these two investments, China seeks to ensure North Macedonia's friendship or at least neutrality³⁰ on decisions and resolutions tabled by Western governments in the United Nations and NATO. In addition, China's economic interests are linked to North Macedonia's geographic position, which is pivotal for the Belt and Road Initiative, as well as its status as an EU candidate country. China's cultural engagement is primarily channelled through the Confucius Institute, which was established in 2013 at the Ss. Cyril and Methodius University in Skopje and has seen a steady increase in student enrolment.³¹

There is no significant Russian presence in North Macedonia's real or financial sectors, except for its reliance on Russian gas. This dependency is expected to decrease following the completion of a new gas pipeline to Greece, scheduled for 2024.³² Russia expanded its influence in North Macedonia's domestic affairs during and after the signing of the Prespa Agreement, opposing the country's NATO accession.³³ While the influence of Russia is noted, its ability to directly impact North Macedonia's EU membership progress is considered limited. The role of the Gulf States remains low, primarily visible in economic and charitable activities, but insignificant in terms of political and social impact.³⁴

4. Systematising the Channels of Influence

External actors in North Macedonia use various mechanisms to exert influence. Formal and informal conduits of influence can often be blurred, or even conflicting, as is also the case between the EU and US, the two biggest supporters of North Macedonia. The EU has at its disposal the instrument of conditionality, through which the country adapts its institutional and legal structures to align with the EU, including active alignment in foreign policy due to the membership perspective. With the rising importance assigned to alignment with EU foreign policy following Russia's full-scale invasion of Ukraine in February 2022, North Macedonia immediately aligned itself with EU sanctions against Russia.³⁵ The EU, through multiple venues such as bilateral relations with member states, EU institutions, and its role as the biggest donor to the country, has exerted the most influence in the country. It has formally prioritised support for democracy and the rule of law—referred to in EU terminology as the *fundamentals*.³⁶

²⁹ Anastas Vangeli, "China: A New Geo-Economic Approach to the Balkans," in *The Western Balkans in the World* (Routledge, 2019), 205–24.

³⁰ Ana Krstinovska, "Chinese Influence in North Macedonia" (CEPA, August 2022), <https://cepa.org/comprehensive-reports/chinese-influence-in-north-macedonia/>.

³¹ Ibid.

³² Jeta Loshaj, "Between Continuity and Change: Russian Influence and Security Challenges in the Western Balkans Since Russia's Full-Scale Invasion of Ukraine" (Friedrich Ebert Stiftung, January 2024), <https://library.fes.de/pdf-files/bueros/kosovo/20922-20240122.pdf>.

³³ Jan Cingel, "Macedonia's NATO Story: Good Things Come to Those Who Wait," *GLOBSEC*, July 19, 2018, <https://www.globsec.org/what-we-do/commentaries/macedonias-nato-story-good-things-come-those-who-wait>.

³⁴ Nechev and Nikolovski, "North Macedonia: A Fertile Ground for External Influences."

³⁵ AFET Committee, "In Depth Analysis: EU Sanctions against Russia: Alignment of the EU Enlargement Countries" (European Parliament, July 2022), [https://www.europarl.europa.eu/RegData/etudes/IDAN/2022/639327/EXPO_IDA\(2022\)639327_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/IDAN/2022/639327/EXPO_IDA(2022)639327_EN.pdf)

³⁶ European Commission, "Remarks by Commissioner Olivér Várhelyi at the Press Conference on the Revised Enlargement Methodology," May 2, 2020, https://ec.europa.eu/commission/presscorner/detail/en/STATEMENT_20_208.

However, despite this formal importance placed on the fundamentals within the conditionality instrument, competing priorities and interests of the Union and its member states have often taken precedence in relations with North Macedonia. First, the EU has frequently prioritised stability and security over democratic reforms, particularly during the management of the 2015–2016 refugee crisis, which coincided with a major wiretapping scandal in North Macedonia. During this period, despite formal pressure to implement rule-of-law reforms, some EU member states informally supported autocratic leadership to secure cooperation in managing the so-called Western Balkans route.³⁷ This influence has often resulted from partisan interests within European political parties, which, as seen in North Macedonia, have conflicted with EU priorities.³⁸ As a result of this tension between formal and informal mechanisms, the impact on the democratic transformation has been weakened.

Within the EU, however, Hungary has engaged with North Macedonia in specific ways on several levels. First, Hungary sees the entire Western Balkans from a security perspective, both in terms of preventing regional instability and addressing illegal migration, as confirmed in its National Security Strategy of 2021.³⁹ The additional interest of Hungary in its relations with North Macedonia and Serbia relates to the role these countries play on the Western Balkans migration route. The link with North Macedonia was further strengthened when Prime Minister Victor Orbán granted asylum to Nikola Gruevski, the convicted former Prime Minister of North Macedonia, who was largely responsible for the 2015 political crisis.⁴⁰ In North Macedonia, Hungarian companies have bought several key media outlets the authoritarian former Prime Minister Nikola Gruevski and his conservative VMRO–DPMNE party.⁴¹ Lastly, this ‘special’ relationship was reaffirmed in 2024 with a joint government session in where Prime Minister Orbán praised the “special economic relationship” with North Macedonia while reiterating the important place the country holds on the migration route. “*Without them [Macedonian government], we might not have been able to stop this migration invasion,*” he said, noting that Hungary had sent border patrol officers to North Macedonia’s southern border.⁴²

In North Macedonia, the United States is a significant formal provider of development assistance as well as a key actor in resolving domestic crises and disputes. North Macedonia’s NATO membership is largely attributed to the US, which also holds a strong presence in the security sector. The US ambassador is seen as one of the most powerful figures in the country and has traditionally played an active role in public political life. The direct US role was further strengthened with a June 2021 executive order sanctioning individuals obstructing the implementation of several agreements, including the 2018 Prespa Agreement and the 2001

³⁷ Kacarska, “Reinforcing or Conflicting? European Union Conditionality and Political Socialisation During the 2015–2017 Macedonian Political Crisis.”

³⁸ Angelos Chrysosgelos, “Europarties in the neighbourhood: how transnational party politics bind Eastern Europe and the Western Balkans to the EU,” *Comparative European Politics* 19 (2021), 77–93 (2021). <https://doi.org/10.1057/s41295-020-00223-4>

³⁹ Government of Hungary, *Resolution 1163/2020 on Hungary’s National Security Strategy*, 21 June 2021, Article 85, <https://honvedelem.hu/hirek/government-resolution-1163-2020-21st-april.html>.

⁴⁰ Former prime minister Gruevski was sentenced to 2 years in prison over a questionable public procurement deal, but had also several other corruption related court proceedings against him.

⁴¹ Sinisa Jakov Marusic, “Hungary’s Media Expansion in Slovenia and North Macedonia,” in *Hungarian Capital in Foreign Media: Three Strategic Models of Influencing the Neighbourhood*, edited by Robert Nemeth (International Press Institute, 2022), <https://ipi.media/wp-content/uploads/2022/02/hu.pdf>.

⁴² “PM Orbán from North Macedonia: Hungary will be winner in coming decade”, *Daily News Hungary*, September 27, 2024, <https://dailynewshungary.com/orban-in-north-macedonia-turmp-migration/>

Ohrid Framework Agreement, with further actions taken on multiple occasions.⁴³ However, the US has also been associated with contested strategic infrastructural investments in recent years. In the summer of 2021, Parliament adopted a special law allowing the cabinet of then Social Democrat Prime Minister Zoran Zaev to negotiate a contract with the Bechtel-Enka consortium, after having already signed a memorandum of cooperation in April away from the public's eye.⁴⁴ Anti-corruption watchdogs identified significant corruption risks in the project, stating that the Government, Parliament, and President circumvented legal safeguards, leading to a clandestine USD 1.3 billion agreement lacking transparency and accountability.⁴⁵

Serbia's channels of influence are diverse and include both formal and informal mechanisms. In terms of formal mechanisms, through the Open Balkans initiative, which includes Serbia, Albania, and North Macedonia, Serbian President Vučić has been able to showcase regional influence, often capitalising on the lack of progress in the EU accession process.⁴⁶ At the same time, Serbia is also seen as a country favoured/respected by the European Union, despite not aligning with the EU's sanctions on Russia whilst being more advanced in its formal EU accession process. The cultural connections between the two countries and the linguistic closeness between the two languages have also played a significant role and were reflected in lavish celebrations of the Day of Serbs in North Macedonia in 2024 and 2025, with high-level participation from the Serbian Patriarch and the President of Serbia.⁴⁷

China's role in North Macedonia, as in the wider region, remains primarily geo-economic⁴⁸, with its economic significance rising between 2010 and 2020 with the construction of the highways mentioned in the previous section. The lack of transparency in these projects, as well as major issues with their implementation, raised questions regarding good governance, institutional accountability and corruption, leading to a criminal investigation.⁴⁹ During the COVID-19 pandemic, China launched a powerful public diplomacy and vaccine diplomacy offensive, aiming to reshape narratives on China in the Western Balkans, with North Macedonia as one of the target countries.⁵⁰ China's approach has been predominantly state-centric, oriented toward maintaining good relationships with officials and high-ranking bureaucrats, using a variety of incentives, such as trips to China, donations, and gifts, to win

⁴³ See US Department of State: Western Balkans Sanctions, <https://www.state.gov/western-balkans-sanctions/>

⁴⁴ Sinisa Jakov Marusic, "Graft Warnings in North Macedonia over 'Hypocritical' Highway Plan," *BalkanInsight*, July 21, 2021, <https://balkaninsight.com/2021/07/21/graft-warnings-in-north-macedonia-over-hypocritical-highway-plan/>.

⁴⁵ Misha Popovic, "The Integrity of Decision-Making: Systemic Omissions in the "Bechtel Enka" Case," (Skopje: Institute for Democracy Societas Civilis, October 2023), <https://idscs.org.mk/wp-content/uploads/2023/09/BehtelEnka-EN-1.pdf>.

⁴⁶ Sava Mirković, "Open Balkan, a Failed Step in the Right Direction," *Osservatorio Balcani e Caucaso*, August 20, 2024, <https://www.balcanicaucaso.org/eng/Areas/Balkans/Open-Balkan-a-failed-step-in-the-right-direction-232590>.

⁴⁷ "Serbian Patriarch Porfirij visits Skopje – will attend the Saint Sava Academy," *Sloboden pečat*, January 2025,

<https://www.slobodenpecat.mk/en/srpskiot-patrijarh-porfirij-vo-poseta-na-skopje-kje-prisustvuva-na-svetosavskata-akademija/>

⁴⁸ Vangeli, "China: A New Geo-Economic Approach to the Balkans."

⁴⁹ Anastas Vangeli, "China's Ideational Impact in the Western Balkans, 2009–2019," in *Western Balkans at the Crossroads: Ways Forward in Analyzing External Actors' Influence*, edited by Ioannis Armakolas et al. (Prague: Prague Security Studies Institute, April 2021), 39.

⁵⁰ Mare Ushkovska, "China's Pandemic-Time Public Diplomacy in the Balkans and the Challenge to the EU's Regional Leadership," *New Perspectives* 31, no. 4 (December 1, 2023): 314–30, <https://doi.org/10.1177/2336825X231206724>.

over decision-makers.⁵¹ Lastly, the Intelligence Agency shared concerns about Chinese propaganda in the 2024 pre-election period, with certain political figures in the country promoting Euroscepticism and Chinese-aligned positions. Still, there is no concrete evidence that those figures were directly supported in any way by China.⁵²

Russia's influence in North Macedonia is smaller compared to other countries in the region, yet it cannot be considered negligible. Similarly, as in the rest of the region, Russia seeks to exploit internal tensions in North Macedonia to disrupt stability and European integration. Russia has been active in political communication regarding the name change and North Macedonia's NATO accession, as well as during the political crisis, advocating a distancing from the EU and NATO. Concerns about Russian interference have been articulated by various officials in North Macedonia, particularly in the context of pre-election propaganda, geopolitical alignments, and bilateral issues. Bujar Osmani, the former foreign minister, often mentioned that Russia has targeted disinformation campaigns—including online trolling and fake news—to “fracture the social fabric of society” in North Macedonia and the wider Western Balkans and stall their accession to the EU.⁵³ Overall, as argued by Bechev, Russia does not have a comprehensive strategy for North Macedonia other than hampering EU and NATO enlargement.⁵⁴ Yet, in a context of continuous blockades and contestations, the space for Russian influence expands.

5. The Outcomes of Externalities on Transitional Contexts

The EU's role in the country, in addition to supporting democratic consolidation, has often had an adverse effect on democratic institutions and processes. The limbo in the accession process between 2010 and 2020 contributed to democratic deterioration, including through its securitisation approach to North Macedonia during the refugee crisis discussed above. This power has been used by both national elites and other geopolitical actors to assert their influence. In fact, the largest infrastructural investments by third actors (i.e. China) date back to the period 2015–16, coinciding with the simultaneous political crisis in the country and the refugee/migration crisis. During this time, Hungary also played a decisive role in supporting the autocratic, outgoing VMRO–DPMNE government for its cooperation on the Western Balkans route. Hungary also managed to expand its influence in the region both economically and politically.⁵⁵ These trends have further strengthened since 2022 and Russia's aggression against Ukraine, with the EU embracing a more transactional approach in the region, which has further undermined its potential to act as a transformative actor.⁵⁶

⁵¹ Krstinovska, “Chinese Influence in North Macedonia.”

⁵² Петар Клиначарски, “Разузнавачите 'ловат' сигнали на кинеска пропаганда во изборите,” *Radio Free Europe*, April 29, 2024, <https://www.slobodnaevropa.mk/a/kina-propaganda-razuznavanje/32916172.html>.

⁵³ Mared Gwyn Jones, “Russia Trying to ‘Hijack’ Frustration with EU Accession Delay - North Macedonia FM,” *Euronews*, January 24, 2024, <https://www.euronews.com/my-europe/2024/01/24/russia-trying-to-hijack-frustration-with-eu-accession-delay-north-macedonia-fm>.

⁵⁴ Dimitar Bechev, “Understanding Russia's Influence in the Western Balkans,” (Hybrid CoE, 2018).

⁵⁵ Cvijić et al., “Balkan Csárdás: Hungarian Foreign Policy Dance.”

⁵⁶ Robert Dopchie and Liridon Lika, “The EU Enlargement Strategy in the Western Balkans: Assessing the Implications Amidst the War in Ukraine,” *European Foreign Affairs Review* (2024), 159–76, <http://www.kluwerlawonline.com/api/Product/CitationPDFURL?file=Journals\EERR\EERR2024007.pdf>.

The US—despite the questionable role of its involvement in the Bechtel-Enka highway—is still largely seen as an actor that supports North Macedonia’s democratic transformation and serves as a security guarantee. However, the continuation of these trends is uncertain following the recent election of Donald Trump as US president. While the current conservative government in North Macedonia boasts of its relationship with the upcoming administration, the potential for instability remains high, particularly in terms of security in the Western Balkans, with significant implications for North Macedonia. Given its major role as a provider of official development assistance, the likely weakening of US support for the promotion of human rights could increase the likelihood of a further retreat in important policy areas such as gender equality, where the country has already experienced significant setbacks in recent years.⁵⁷

As mentioned above, Serbia, in recent years, has strengthened its position as a regional power in the Western Balkans through several instruments, including an active foreign policy, support during COVID-19, and its religious influence, particularly in North Macedonia. The outcome has been a significant rise in the popularity of Serbia among the public, as confirmed by the regional IRI poll in 2024, in which 34 per cent of the population in North Macedonia consider Serbia the country’s biggest all—more than double the percentage of those who named the US, which ranked second.⁵⁸ The rise in the popularity of Serbia is significant for the internal development of North Macedonia from two perspectives. First, the perception of Serbia impacts the management of ethnic relations in North Macedonia due to its multi-ethnic composition, as well as the need to balance political relations with both Kosovo and Serbia as neighbours. Second, support for Serbia in public opinion polls is also seen as a proxy for legitimising autocratic governance models and reinforcing the policy of balancing between competing powers, which remains a dominant ideology among the country’s leadership.

As a neighbour to both Kosovo and Serbia, North Macedonia has had to balance its diplomatic and political relationships with both states, often walking a fine line to avoid alienating either side. On the one hand, North Macedonia recognised Kosovo’s independence in 2008, aligning itself with the broader international consensus and its own Albanian community. On the other hand, maintaining stable relations with Serbia remains crucial, and the most recent IRI Western Balkans Poll indicates that Serbia is considered North Macedonia’s friendliest nation among citizens.

Türkiye, as elaborated above, has been slowly solidifying its position as a geopolitical actor in North Macedonia through investments and its security partnership in NATO. According to the latest IRI poll, it is viewed most favourably as a country, together with Germany, confirming the importance of Recep Tayyip Erdogan as a leader and Türkiye’s high ranking as an ally.⁵⁹ The solidified position of Türkiye along various axes, particularly at the expense of Russia, whose influence continues to fade, particularly in the context of the war in Ukraine, has also been confirmed by recent research.⁶⁰ In light of the stagnation of North Macedonia’s EU accession process, it is likely that the influence of Türkiye will be further strengthened, including through

⁵⁷ The European Commission for example has considered that a formal anti-gender movement is present in North Macedonia. See European Commission, European Commission, *North Macedonia Report 2024* (Brussels: European Commission, 2024), https://neighbourhood-enlargement.ec.europa.eu/document/download/5f0c9185-ce46-46fc-bf44-82318ab47e88_en?filename=North%20Macedonia%20Report%202024.pdf..

⁵⁸ “IRI 2024 Western Balkans Poll.”

⁵⁹ Ibid.

⁶⁰ Bojana Zorić and Věra Stojarová, “Non-Western Influence Operations in North Macedonia: A Reason for Concern or Push towards the West?,” *European Security* 32, no. 4 (October 2, 2023): 696–716, <https://doi.org/10.1080/09662839.2023.2178845>.

the model of governance it promotes, which aligns closely with the orientation of Prime Minister Orbán, and the new US administration as key partners of the current government.

China has been described as a latent influencer through its investment (lending) opportunities offered to the country and its use of Chinese funds for large infrastructure projects. However, as mentioned above, the failure to complete a major infrastructural project as a landmark Chinese investment in the country has come at a significant cost, in addition to undermining the rule of law and procurement practices, thereby hindering reforms linked to EU accession. Even though successive Macedonian governments have expressed a desire and undertaken various measures to attract investment from China, the amount of Chinese FDI in North Macedonia has been much lower and less significant than in the rest of the Balkans, not to mention most of Europe.⁶¹ Overall, Macedonian elites see China as an important partner that could be a source of supplementary economic cooperation, but not a provider of strategic alternatives to relations with the West.⁶² This has been confirmed by public perceptions of China showing a positive shift in North Macedonia and Albania, but this shift has not translated into a change in their pro-EU stance.⁶³

The discussion above primarily outlined that Russia's engagement in North Macedonia has functioned as a spoiler to its NATO and EU accession. While North Macedonia's NATO membership has constrained this influence, Russia has often used the limbo in the EU accession process to stir internal divisions and opposition to the EU. Since 2022, Russia added North Macedonia to its list of enemy states due to its decision to impose sanctions on Russia after its invasion of Ukraine, following the EU's example.⁶⁴ According to the Prespa Institute's International Impact Index, Russia is not considered a top influencer in the internal affairs of North Macedonia.⁶⁵ Yet, in the face of continued accession blockages and disputes, the space for Russian influence expands, including indirectly through Serbia's actions and geopolitical model.

6. Key Highlights

This report provides an analysis of the impact of external geopolitical actors on North Macedonia's EU integration process and democratic development. It identifies and examines the EU, the US, Serbia, Türkiye, China, and Russia as external geopolitical actors in the country. As a candidate for EU membership for almost 20 years, North Macedonia's democratic development has been primarily influenced by the EU, including its member states and institutions. While the EU has been the country's main partner, both politically and economically, and is largely aligned with the US, its potential influence has been limited due

⁶¹ Anastas Vangeli, "China in Southeast Europe: A Regional Perspective," in *The Role of China in Southeast Europe*, edited by Amastas Vangeli (Friedrich Ebert Stiftung Dialogue South East Europe, 2022): 3.

⁶² Anastas Vangeli, ed., *The Role of China in Southeast Europe* (Friedrich Ebert Stiftung Dialogue South East Europe, 2022), <https://library.fes.de/pdf-files/bueros/athen/19416.pdf>.

⁶³ Ushkovska, "China's Pandemic-Time Public Diplomacy in the Balkans and the Challenge to the EU's Regional Leadership."

⁶⁴ Samir Kajosevic, "Russia Adds Montenegro, Albania and North Macedonia to 'Enemy' List," *BIRN*, May 7, 2022, <https://balkaninsight.com/2022/03/07/russia-adds-montenegro-albania-and-north-macedonia-to-enemy-list/>.

⁶⁵ Loshaj, "Between Continuity and Change: Russian Influence and Security Challenges in the Western Balkans Since Russia's Full-Scale Invasion of Ukraine."

to stagnation in the country's EU accession caused by bilateral blockades from its neighbours. These specific circumstances have created a vacuum enabling the engagement of other geopolitical actors, such as Serbia, Türkiye, Russia and China.

In North Macedonia, the EU acts through its policy of conditionality, supporting democratisation as a candidate country for nearly two decades. Yet, the protracted nature of the accession process and the weakened influence of EU enlargement have created significant challenges and space for alternative engagement by EU member states, not always aligned with official EU policy. Hungary, for example, while an EU member state, applies a securitisation strategy towards North Macedonia as part of the Western Balkans and actively promotes illiberal policies. This divergence weakens the EU's ability to implement a coherent policy in the country. The US, as the main partner of the EU in North Macedonia, has mostly facilitated EU integration, including through direct political engagement and most notably supporting the country's NATO membership.

The influence of external actors in North Macedonia operates through various mechanisms and channels, including formal agreements, political actors, economic investments, media, and religious organisations. Although most formal mechanisms relate to cooperation in political, security, and economic terms, formal agreements and legislation have also, in some cases, been used to circumvent public procurement procedures. Türkiye uses both formal mechanisms such as investments, educational support, and development assistance, as well as its NATO partnership. While China follows a highly state-centred approach, aiming to boost its image after controversial infrastructural investments, Russia primarily uses informal channels for disinformation purposes and to capitalise on discontent with the EU accession process. Meanwhile, Serbia, in addition to its formal engagement and positioning itself as a leader in the Western Balkans region, has invested heavily in winning the hearts and minds of the Macedonian public, particularly through active diplomacy during the COVID-19 crisis and regional integration activities.

Although North Macedonia has long been a candidate country for EU accession, it has undergone significant periods of democratic stagnation and backsliding, particularly during times when the EU's role has been less prominent due to bilateral vetoes and a general lack of interest in enlargement policy. External actors such as China exploited investment procedures for key infrastructural projects, further eroding the already weak rule of law. However, the failure of this specific infrastructural project has minimised—but not eliminated—such risks in the future. Russia, despite minimal investment, has often capitalised on the discontent with the EU accession process. However, the greater short- and long-term risk for North Macedonia lies in its two main strategic partners, the EU and the US. Regarding the former, the longer North Macedonia remains in accession limbo, the greater the scope for other actors to act and deploy their mechanisms at hand. As for the latter case, the uncertainty surrounding the direction of the second Trump-led US administration remains a challenge for a country and region heavily reliant on the US as a key security provider.

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