



FACING STABLE DEMOCRACIES OR TAKING A PATH WITH INCONSISTENT TRAJECTORY

Report on the International Impact Index 2019



2019



The report on the International Impact Index is an innovative project that provides a systematic annual assessment of North Macedonia's international partners performance in the country. With its depth and high level of sophistication it is a very valuable tool for assessing the bilateral relationships, the trends and potential of the exchange. As it is also probably intended, the Index presents a very detailed picture of the Macedonian society, economy and politics, seen through the lens of cooperation. We see a country that is finding its way back to the complex world of international relations, after years of (self)isolation. The two international agreements highlighted in the report, with Bulgaria and with Greece, demonstrate that North Macedonia's reintegration is producing also positive results on the inside, with institutions and society carrying a strong anchorage in the region, where next to Bulgaria and Greece we see also Serbia as well as Turkey being key players.

Perhaps the only element that is missing and may need more attention in the next editions of the Index is the issue of impact, usually described and understood as the ability of various actors to influence the country in question, and vice versa. This would be a new and separate area of mostly qualitative research, which could be based on the data currently collected and reflect the views of local analysts and/or their colleagues from the top 5 countries by presence. That would in turn provide even more scope for policy analysis and proposals and would draw even more attention from professional circles and wider audiences.

Finally, I would like to congratulate the team of the PRESIPA Institute for the amazing work they have done in painting a very differentiated and precise picture of North Macedonia's international partnerships, which will hopefully be continued in the years to come, in order to create a database with a longer-term perspective.

Vessela TCHERNEVA,

Deputy-Director of the European Council of Foreign Relations and
Director of the Council's Office in Sofia, Republic of Bulgaria



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Report on the International Impact Index 2019

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**PRESPA Institute Skopje
2020**

“FACING STABLE DEMOCRACIES OR TAKING A PATH WITH INCONSISTENT TRAJECTORY” –
Report on the International Impact Index 2019 Research

Publisher: PRESPA Institute - Skopje

For the publisher: Andreja Stojkovski, Executive Director

Authors: Andreja Stojkovski LL.M. (coordinator), Diana Zhupanoska M.A.,
prof. Dragan Tevdovski Ph.D., Goran Lazarov

Design: Brigada Design

Printing: Propoint

July, 2020

CIP - Каталогизација во публикација
Национална и универзитетска библиотека "Св. Климент Охридски", Скопје

303.223:327.7/.8(100:497.7)"2019"(047.31)

303.223:341.232(100:497.7)"2019"(047.31)

FACING stable democracies or taking a path with inconsistent trajectory:
report on the International Impact Index 2019 research /
authors Andreja Stojkovski ... [и др.]. - Skopje : Prespa Institute,
2020. - 124 стр. : илустр. ; 30 см

Фусноти кон текстот. - Други автори: Diana Zupanoska, Dragan Tevdovski,
Goran Lazarov. - Содржи и: Annex 1-4

ISBN 978-608-66576-1-1

1. Stojkovski, Andreja [автор] 2. Zupanoska, Diana [автор] 3. Tevdovski,
Dragan [автор] 4. Lazarov, Goran [автор]

а) Меѓународно присуство – Индекс за мерење – Македонија – 2019 – Истражувања

COBISS.MK-ID 52026373

The content for this report was prepared by PRESPA Institute - Skopje with the support of the American people through the United States Agency for International Development (USAID). The authors views expressed in this publication (“FACING STABLE DEMOCRACIES OR TAKING A PATH WITH INCONSISTENT TRAJECTORY” – Report on the International Impact Index 2019 Research) do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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Foreword

The hearing entitled **“Advancing U.S. Interests in a troubled World: The FY 2016 Foreign Affairs Budget”** in the Foreign Affairs Committee of the US Congress would have gone unnoticed in the country, if the focus was not on Ukraine and relations with Russia. The main news in the Macedonian media quoted the statement of the then Secretary of State John Kerry: “When it comes to Serbia, Kosovo, Montenegro, Macedonia and others - Georgia, Moldova, Pridnestrovian Moldavian Republic, they are on the line of fire.” who, answering a senator’s question, spoke about the future conflict between Russia and the West. The hearing took place 16 days after the then opposition released the first audio materials from the illegal wiretapping of citizens, the so-called bombs, on February 25, 2015 perfectly occupying the attention and imagination of the citizens, and was a great introduction to the stories of the “yellow vans” and “foreign services”. As a consequence of this, as well as the limited information, the analysis of the political developments in the country and the “colorful revolution” that followed, was largely a mixture of folklore and conspiracy theories. Hence, the need for a comprehensive understanding of the complexity of international relations was more than clear, and almost as important as the need to develop evidence-based foreign policy.

The answer presented itself that same year, with the first encounter with the **Global Presence Index** of the Elcano Royal Institute from Madrid, Spain. Three dimensions of presence, a large number of variables and indicators, fully scientifically supported research on the global presence of countries. It took a long time and a lot of effort for the Global Presence Index to be transformed into an **International Impact Index**, an index that monitors and analyzes the presence of other countries in the Republic of North Macedonia. In an extremely difficult year, such as 2020, **PRESPA Institute** managed to transform the idea into a project, and the project team conducted research and analyzed the collected data. In addition to the concept from the Index of the Elcano Institute, an **Image Observatory** was

conducted, and those results related to the data of the International Impact Index enabled a comprehensive analysis of the foreign presence and how much it is used to achieve impact.

The Global Presence Index of the Elcano Royal Institute and its last two annual reports, for 2018 and 2019, were the basis for the design of the project and the research, as well as for the analysis of the obtained results and the preparation of this report. While the handling of the data and the creation of the International Impact Index was done according to the **“Handbook on Constructing Composite Indicators - Methodology and User Guide.”**, a joint publication of the Organization for Economic Cooperation and Development (OECD) and the Joint Research Center of the European Commission (JRC).

“Facing Stable Democracies or Taking a Path with Inconsistent Trajectory” is a report from the research for the International Impact Index for 2019 and represents the countries and their international presence in the Republic of North Macedonia. At the same time, the report should serve as a tool for understanding the complexity of foreign policy and international relations in conditions in which North Macedonia is slowly emerging from the (self)isolation and increasing the intensity of cooperation in the region and in Europe. Moreover, due to the developed methodology and scientific setting, the report and the data from the Index are amenable for use in theoretical discussions, as well as in the development of public policies.

Finally, on behalf of the **PRESPA Institute**, allow me to express our gratitude for the support we have received from the **United States Agency for International Development (USAID)** in implementing this project and creating the International Impact Index. We would also like to especially thank prof. Dr. Iliana Olivié and prof. Dr. Manuel Gracia, coordinators of the Global Presence Index at the Elcano Royal Institute in Madrid, Spain, for their advice and guidance on project implementation and research.

PRESPA Institute
Andreja STOJKOVSKI, executive director

International Impact Index |

I. Executive Summary

1. The European Union as a strategic partner

The European Union is a strategic partner of the Republic of North Macedonia. This is a position that the citizens of the country have, as well as the position that most of the experts interviewed under the Image Observatory 2020¹ share. However, this partnership is founded on common interests. There is the country's interest in becoming a member state, but also there is the Union's geopolitical interest to consolidate through accepting into membership the Western Balkans.

The effect of such partnership is manifold. **First**, the EU is North Macedonia's largest trading partner. Trade between the Union and North Macedonia is estimated at billions of euros. **Second**, the institutions of the European Union are the largest donor of development aid in the country. Since independence, the EU has donated more than 3.5 billion euros, i.e. for 2019 alone the amount is approximately 140 million euros. **Third**, given the scope of the signed agreements and their impact on the various sectoral policies, the EU and North Macedonia have the most extensive bilateral cooperation in general. **Fourth**, the European Union is part of

the standard discourse in North Macedonia. On social media, in 2019, the European Union was mentioned a total of 28,323 times. That is three times more than the most mentioned country, the United States (7,695), or 50 times more than the least mentioned country, Romania (563). **Fifth**, if due to the absence of a formal common education policy, universities and students from the member states are presented as European, then the European Union is the main partner for the country in terms of education, science and research.

We can continue enumerating; however, the most significant effect is the contribution to the democratization of society. The European Union has shown through the negotiations in Przino, the May process and the Ohrid Framework Agreement that it can be part of the processes for overcoming political crises. True, the axis of the transatlantic partnership, at least when it comes to this country, works great, and the European Union, in every political crisis and in every of the above-mentioned processes, has worked together with the United States of America as a partner. Therefore, it is understandable that the member states of the European Union have full dominance in the presence in North Macedonia, after all we are the EU's backyard.

¹ Image Observatory is a research action of PRESIPA Institute that observes attitudes, perceptions and positions of the citizens of North Macedonia relating to foreign policy, economic, political and cultural cooperation, as well as attitude and perception of the citizens on the countries under the International Impact Index. The Image Observatory includes surveying and opinion polls, as well as structured and semi-structured interviews with experts, activists and other opinion makers.

2. Consolidation of foreign policy

The Foreign Policy of North Macedonia is built on the principle of a state that is at the crossroads of the region, although lately the location is on the line of the historical conflict between east and west. The well-established foundations in a democratic liberal structure with its own political system defined by an internationally accepted constitution offering openness to international organizations were successful, and the country was far more visible than its actual weight. Discontinuity arose when the country distanced itself from such foreign policy, and the price was the loss of friends and distancing of partners, which ultimately turned us into a failure story of the region.

In a relatively short period of time, North Macedonia managed to transform itself into a success story. The transformation was at a higher price, but the result is the achievement of two of the strategic goals of the state. First, at the height of the COVID-19 pandemic, the Spanish Senate ratified the NATO Accession Protocol, thus making the country the 30th member of the alliance. Shortly afterwards, the Council of the European Union decided to open Accession Negotiations. It is a historic success, leaving behind a period of bilateral problems and disputes. North Macedonia becomes a part of the Western alliance, and its values should become part of North Macedonia's values. The following period will be dedicated to this process, creating the European reality and the Europeanization of society.

3. Battle between emotions and reason

North Macedonia does not have the capacity to be a regional player, and it is far from being a global player. Fortunately, a global power like the United States has a geostrategic interest in the country. It is also good that the new "geopolitical" European Union has an interest in anchoring the region to Brussels, and even more so that such an interest is part of Germany's vision for Europe. From an emotional point of view, closest to the mentality of the citizens of North Macedonia are Turkey, Serbia and Russia. There are strong cultural ties and influences with Turkey, which are still present, and Turkey's presence is strong in our country in all its forms. A major part of the population has serious sympathies for Serbia. It is one of the main economic partners, and the linguistic proximity and historical ties makes it extremely visible in the culture. For the citizens, they, "Serbia and Russia are our Slavic brothers, Orthodox nations...", but also, unpredictable allies.

The experiences are many, authentically ours, as well as those of the countries in the region. It is not at all simple when you pay for success with difficult and unpopular reforms, but it is certainly better to face stable democracies that have a policy of hard power towards the region, than to take a path with an inconsistent trajectory.

II. Ten Questions about the International Impact Index

1. What does the International Impact Index measure?

The International Impact Index is a synthetic index. It orders, quantifies, and aggregates the presence of different countries in North Macedonia. In doing so, the Index answers the following question: *to what extent and in what form are countries present within the borders of North Macedonia?*

2. Does the International Impact Index measure impact?

No, the Index does not measure the impact of a particular country, but rather the country's presence. Under presence, the Index understands the effective positioning in absolute terms, of different countries in three different dimensions: economic, political and soft, or cultural presence. On the other hand, impact is the ability of countries to contribute to the change in specific policies, institutions or positions and depends on the foreign policies of those countries, and a number of other factors that transform the actual presence in the achieved impact. Thereby, the countries monitored by the Index may have strong presence, but they might not use it or are not be able to materialize it in achieved influence in North Macedonia. However, because attitudes, perceptions and stereotypes about the countries are observed, the Index will be able to analyze, evaluate and set thesis for the achieved impact of a certain country.

3. Does the International Impact Index measure only the quantity of presence, or its nature as well?

Both. The International Impact Index covers three dimensions of the presumed presence of the countries – economic, political and soft or cultural presence, which is based on 20 variables and a total of 47 individual indicators. Given the scope of the variables and indicators, the International Impact Index is a useful tool for analyzing and monitoring the extent of the presence of the monitored countries in North Macedonia, as well as the nature of that presence.

4. How is the International Impact Index calculated?

Although the Observatory of Impact and Image follows the attitudes, perceptions and stereotypes about different countries, the International Impact Index, which is the main product of this observatory, is calculated on the basis of objective and publicly available data, such as: international statistics, data of international organizations, domestic statistics, data collected and processed by national institutions, data from other international databases, as well as data from media monitoring in which several electronic and traditional media in Macedonian and Albanian are monitored.

5. How are the variables for the International Impact Index determined?

The International Impact Index tracks the presence of 24 countries in the Republic of North Macedonia. The index is one-wayed and follows the projection of the countries through import, visit, or entry into North

Macedonia. The data that is collected and processed refers to both the results and the means or tools that countries have at their disposal to achieve a presence. Also, the presence is analyzed and presented in an absolute sense because it does not analyze the states and their score based on their size or wealth. Finally, the Index attempts to determine and monitor the presence in North Macedonia through the smallest possible number of variables and indicators, in order to be simple and get a complete picture of the presence of countries.

6. How are the variables and dimensions in the International Impact Index related?

The values assigned to the dimensions and variables in the International Impact Index were determined by a survey conducted on 144 experts from two lists: citizens of North Macedonia and foreign nationals, which was done in the second half of June 2020. Through the survey, the experts were asked to determine value for each of the dimensions of presence, as well as value for each of the variables within the dimensions.

7. What happens when there is no data?

In circumstances when data is not available for a certain indicator or variable, the expert on econometric models of the project made estimations for the data. Within the International Impact Index, a total of 3384 data are collected, while estimations are made for 144 of them, or 4.25% of the database.

8. For which years is the International Impact Index calculated?

The International Impact Index is calculated for 2019, while 2010 and 2000 are taken as reference years.

9. How was it decided for those years?

For the International Impact Index, 2019 is the starting year for project implementation and the calculation. The years 2010 and 2000 are reference years, and the calculation of the index was made in order to see the transformations of the international presence in the Republic of North Macedonia in two extremely important periods. The first period, 2000, as a period after the entry into force of the Cooperation Agreement with the European Union, and before the signing of the Stabilization and Association Agreement. The second period, 2010, as a period after the NATO Summit in Bucharest in 2008 and the first recommendation of the European Commission to open accession negotiations with the country in 2009.

10. Which countries are included in the calculation of the International Impact Index?

The International Impact Index follows a total of 24 countries in three different groups: The Western Balkans, European Union Member States and Global Players. The Index includes: Albania, Bosnia and Herzegovina, Kosovo, Serbia and Montenegro; Austria, Bulgaria, Germany, Greece, Italy, Poland, Romania, Slovenia, Hungary, France, the Netherlands, Croatia, Sweden and Spain; and China, the United Kingdom, Russia, the United States, and Turkey.

III. Methodology

1. About the project and the International Impact Index

The International Impact Index is conceptualized as a synthetic index that orders, quantifies, and aggregates the presence of different countries in North Macedonia. The project concept and the research were created as a result of the success of the Global Presence Index, its methodological basis and the work of the Elcano Royal Institute, and were the product of direct cooperation and consultations with the Institute. To be completely honest, the long-term personal connection to the Kingdom of Spain as well as to several leading representatives to the Spanish think tank community, play a role in conceptualizing the project and the research.

The project and research were coordinated by Andreja Stojkovski, Senior Researcher and Executive Director at PRESPA Institute, and Goran Lazarov, a Research Fellow at PRESPA Institute, and Diana Zhupanoska, a Senior Researcher at the Institute, who also participated in the work. Thereby, the work on the concept included direct and continuous consultations with Beti Jacheva, Assistant Director of the Directorate for European Union, as well as other relevant diplomats from several different directorates of the Ministry of Foreign Affairs, from several foreign diplomatic missions accredited in North Macedonia, as well as senior officials from the European Commission and representatives of think tank organizations active at European level.

The creation of the first edition of the International Impact Index and this report are the result of the project

“Measuring Foreign Presence and Influence in North Macedonia” supported by the United States Agency for International Development (USAID). The project united the initial team that worked on the Index’s conception, Stojkovski, Zhupanoska and Lazarov, and was strengthened with the participation of Jovana Petkovska as an assistant researcher. As experts, in the realization of the project, were included prof. Dragan Tevdovski Ph.D., project econometrist, and Bojan Boskoski, expert in data processing and programming.

The project is the first institutional cooperation of PRE-SPA Institute with the Royal Elcano Institute from Madrid, Spain. The coordinators of the Elcano Global Presence Index, prof. Iliana Olivié Ph.D., Senior Researcher-Analyst and prof. Manuel Gracia Ph.D., a Researcher-Analyst, were contracted as international experts in creating the International Impact Index and the project.

Developing the concept for the International Impact Index, the project team determined that it would measure the quantity of states’ presence and the nature of such presence. In addition, for the Index, the presence is reflected in three different dimensions: economic, political and soft, or cultural presence. Additionally, the project includes an Image Observatory which monitors the attitudes and perceptions of citizens about the countries covered by the Index, in order to assess the impact, they make using their presence. Hence, the Index will be useful for revealing how much countries are present in North Macedonia, what is the nature of their presence, while by monitoring the perceptions how much such a presence is used to gain influence.

2. International Impact Index Structure

The International Impact Index determines and monitors the presence of countries in Republic of North Macedonia in three dimensions: economic presence, political presence and soft or cultural presence. The Index structure, in addition to the three dimensions, includes the following variables, i.e. number of indicators within the variable

other think tanks on the impact of development aid² on the labor market and employment rate, and thus on the economy as a whole and the quality of life.

Creating the economic dimension of the presence, the project team also considered the variable for foreign direct investment, i.e. whether the volume of foreign direct investment should be taken into account, or the flows (inflows). At the same time, monitoring the volume of foreign direct investment is amenable to establishing long-term productive relations between countries,

ECONOMIC PRESENCE	POLITICAL PRESENCE	SOFT (CULTURAL) PRESENCE
1. Energy (4)	1. Diplomatic Relations (1)	1. Immigration (1)
2. Primary goods (5)	2. Foreign Missions (7)	2. Tourism (1)
3. Manufactures (8)	3. Exchange Visits (1)	3. Culture (3)
4. Services (1)	4. Bilateral Cooperation (2)	4. Media (1)
5. Foreign Direct Investments (2)	5. Military Cooperation (3)	5. Social Media (1)
6. Remittances (1)		6. Technology (1)
7. Development Aid (1)		7. Science and Research (1)
		8. Education (1)

Table 1. Overview of dimensions, variables and number of indicators by variables in the International Impact Index

The determination of the dimensions and structure of the variables was done in the basic consultations with the Ministry of Foreign Affairs in the conception of the project and the Index. Additionally, the determination of the variables and indicators was done through the qualitative research that was conducted within the project. The qualitative research covered five different target groups: academia, civil society, diplomatic staff, media workers and the general public. A total of 46 structured interviews were conducted. The analysis of the interviews helped to specify the variables and indicators, and especially helped in the preparation of the quantitative public opinion poll to determine the attitudes, perceptions and stereotypes regarding the foreign policy and the countries observed by the Index.

while monitoring inflows offers constant insight into all, including short-term changes. Therefore, the project team decided to monitor both indicators in order to be able to analyze both aspects.

At the very end, in terms of the economic dimension, it should be pointed out to the variable that covers remittances and connects with the country's diaspora. The variable, thus determined, shows a connection with the external representation, or the global presence of North Macedonia. However, the project team took into account previously conducted research by other think tank organizations³ and the analyzed impact that remittances have on the country's economy and decided to keep the variable and the indicator.

i. Economic Presence

Within the economic presence, variables such as energy, primary goods, manufactures, services, foreign direct investment and remittances quite adequately show the presence in the economic dimension. In addition to these, the project team decided to add development aid as well. Typically, the development aid exceeds the framework provided by the economic dimension, especially in a post-conflict or reconstructive phase, i.e. in terms of accession to the European Union. With all this in mind, and knowing the importance of development aid to the entire economy, the project team in consultation with international experts decided to add it as a variable. The team was guided by previous research by

ii. Political Presence

Regarding the political dimension of presence, the Index presents it through five specific variables that cover the main aspects of what countries invest as funds to guarantee their own presence in North Macedonia. Starting from the length or stability of diplomatic relations, through foreign missions, exchange visits and bilateral cooperation, i.e. military cooperation, any

² "WIN-WIN Policy" Eighteenth Quarterly Accession Watch Report, Foundation Open Society – Macedonia and Macedonian Center for European Training, July 2013; https://fosm.mk/wp-content/uploads/publications/lzvestaj_18_ang_web.pdf

³ The size and effects of emigration and remittances in the Western-Balkans: Forecasting based on a Delphi process - Finance-Think and others, Regional Research Promotion Program 2016; <http://www.doznaki.mk/>

variable of this dimension is a tool or a means. Therefore, when comparing between North Macedonia and its presence globally, as well as the presence of other countries in North Macedonia through economic and soft, or cultural dimension, this dimension can be extremely important for comparing and evaluating the diplomatic efforts that have been made and already measured with other indexes.

The political dimension of the presence of certain countries in North Macedonia, according to the way it is conceived, corresponds to a mini index that will deal only with the aspects of the political presence.

iii. Soft or Cultural Presence

Within the soft, or cultural presence the International Impact Index contains 8 variables that correspond to the area they represent. Speaking of tourism, the Index does not track exports of services abroad, but only the volume of tourists who visit North Macedonia during a year. Thus, avoiding duplication of indicators. Also, when it comes to cultural exchange, the Index talks about artists who have been guests in cultural institutions or festivals. The indicator formulated in this way uses what in essence is a private exchange. However, by taking this private visit as a representation of art schools, directions, movements or contemporary scenes, the Index monitors these private visits and recognizes their connection to the state.

Wanting to acknowledge the importance of social media for foreign relations, the Index also monitors the activity of our community on social networks and the discussions it holds regarding the countries that are monitored. For the purposes of this variable, the Index takes into account the discussions of the entire Twitter community, according to number of followers and interaction with them, i.e. only posts on the verified profiles of public figures, organizations, institutions and political parties from North Macedonia on Facebook.

3. Data Sources

The International Impact Index is created based on objective and publicly available data. It is a combination of statistical data and other data derived from national institutions and international organizations, data from other institutions and international databases, as well as media monitoring. The data for the creation of the Index comes from the following sources:

1. **International Statistics:** Eurostat, Statistical Division of the United Nations, Statistical Office of the International Monetary Fund and Statistical Office of the World Bank;
2. **International organizations:** World Intellectual Property Organization, UN Conference on Trade and Development, World Bank, International Monetary Fund, Organization for Economic Co-operation and Development, etc.
3. **Domestic statistics:** State Statistical Office and the National Bank;
4. **Data collected and processed by national institutions:** Ministry of Foreign Affairs, Ministry of Defense, Ministry of Local Self-Government, State Office of Industrial Property, National Philharmonic Orchestra, National Opera and Ballet, Macedonian National Theater, Drama Theater, NI Comedy Theater, Turkish Theatre, Albanian Theatre, National Theater Bitola, Ohrid Summer Festival, Skopje Jazz Festival, OFF Fest, Taxirat, International Festival of Chamber Theater "Risto Shishkov", International Theater Festival "Faces without Masks", International Theater Festival "MOT" etc.
5. **International Databases:** Elsevier's Scopus and AidData Research Laboratory at the Institute for Global Research at William's & Mary University; as well as
6. **Media monitoring.**

The provision of the data was through direct communication between Prespa Institute and the project team with the data bearing institutions, while prior to this, the project was introduced to the Office of the Prime Minister of North Macedonia.

The project team was successful in providing data for most of the indicators and variables. However, for some of the indicators it was not possible to provide adequate data which imposed the need to make an assessment through other bases and other related data. Estimates were made within the project team for two variables of the economic presence, i.e. services and remittances.

Remittances are estimated using the methodology

used by the World Bank, which is presented in the paper of Ratha and Shaw (2007). The starting point for the assessment in 2000 is the data from the World Bank database for the total remittances received in North Macedonia, and then the distribution of remittances by countries is done using the following weight:

$$w_j = \frac{M_j Y_j}{\sum_j M_j Y_j}$$

where M_j represents the number of emigrants from North Macedonia living in country j , and Y_j represents the gross national income per capita (in purchasing power parity) of country j .

The data on the number of emigrants from North Macedonia in 2000 are from the World Bank database “**Global Bilateral Migration**”, while the national income data are from the “**World Development Indicators**”, which is also a database of the World Bank. In this way, an assumption is used that remittances are proportional to the number of emigrants and the economic development of certain countries. And because the World Bank, since 2010 has published data on bilateral remittances of countries around the world, the data for 2010 and 2019 are downloaded from there. Specifically, remittances for 2010 are taken from the “**Matrix of bilateral remittances in 2010**”, and remittances for 2019 are received from the “**Matrix of bilateral remittances in 2018**”, as the last published matrix.

The import of services is estimated with the help of the so-called mirror statistics, i.e. it is based on the published data from the export of services from other countries in North Macedonia. Most of the data is taken from the database of the United Nations Conference on Trade and Development (UNCTAD), while the missing data in this database are estimated on the basis of data from Eurostat. The starting point is the fact that most of the import of services in North Macedonia is from EU member states (in 2018, almost 97.5%). Hence, the distribution of the rest of the import of services is made using an estimate based on the participation of each country in the world export of services and the contribution of each country in the export of goods in North Macedonia.

Furthermore, the Organization for Economic Cooperation and Development provided the data for the variable Development Aid, but lacked data for China and the Russian Federation. To complete the Index for these countries, i.e. for China data was used from AidData, a research laboratory at the Institute for Global Research at William’s & Mary University. Thereby, the data used are for 2002, 2010 and 2014. For Russia, in the absence

of reliable statistics, the data of The Federal Agency for the Commonwealth of Independent States, Compatriots Living Abroad and International Humanitarian Cooperation of Russia and the database of foreign aid of the Secretariat for European Affairs were taken into account and it was determined that no foreign aid was registered from this country.

For the needs of data verification, i.e. confirmation of the estimates and such additional data, we addressed a letter to the diplomatic missions of the countries observed by the Index and received only a limited number of responses that confirmed the existing information.

The main sources of data on the political presence were the Ministry of Foreign Affairs and the Ministry of Defense. By providing the data, we managed to confirm an established public perception of one of the institutions, and thus to confirm the general trust in it. Unfortunately, the data provided for some of the variables and indicators were not systematized, nor were they complete, so we again addressed the diplomatic missions accredited in North Macedonia. At last, in this dimension, the provision of data on twinning of cities, municipalities and the city of Skopje with cities and municipalities from the countries followed by the Index was done through unofficial lists maintained by the Ministry of Local Self-Government, publicly available data on the websites of municipalities and the city of Skopje, internet databases and reviews, as well as through the mechanism for access to information of public interest.

For soft or cultural presence, the data was provided from multiple sources. Moreover, in terms of cultural exchange, the data was collected on the internet sites of cultural institutions and festivals, and for the needs of their verification, the mechanism for access to information of public interest was used. For the science and research variable, Elsevier’s Scopus database of authors, excerpts, and citations was used. At last, in this dimension, an exercise of media monitoring was performed, through which Pikasa Insight Agency reviewed all published articles and determined the number of mentions in the headlines and in the text of the news from a list of identified media outlets. The list of media outlets that were subjected to media monitoring included the main TV stations: MTV1, MTV2, Kanal 5, Telma, Alfa TV, 24 Vesti, Sitel, Alsat-M and TV21; then the portals: Sloboden Pecat, Plusinfo, Kurir, Republika and NovaTV, as well as printed media: Nova Makedonija and FOKUS. The selection of media was made as a result of the qualitative research done at the beginning of the project implementation, as well as after additional consultations with the expert public and representatives of civil society.

4. International Impact Index Countries

The International Impact Index first edition, in 2019, follows 24 countries. The countries monitored by the Index are grouped into three different groups, the Western Balkans, European Union member states and global players.

- a. Benelux countries;
- b. Iberian Peninsula countries;
- c. The Scandinavian group of countries;
- d. The countries of the Visegrad Group;

Western Balkans	EU member states	Global Players
1. Albania	1. Bulgaria	1. United Kingdom
2. Bosnia and Herzegovina	2. Croatia	2. United States of America
3. Kosovo	3. Greece	3. Russia
4. Serbia	4. Hungary	4. China
5. Montenegro	5. Romania	5. Turkey
	6. Germany	
	7. France	
	8. Italy	
	9. Spain	
	10. Austria	
	11. Slovenia	
	12. Sweden	
	13. Poland	
	14. The Netherlands	

Table 2. Overview of the countries covered and the groups to which the countries belong according to the International Impact Index

The selection of countries was made in the initial consultation with the Ministry of Foreign Affairs, based on the following principles:

1. To include only countries that have resident diplomatic missions in the Republic of North Macedonia;
2. To include all neighboring countries and the countries of Western Balkans;
3. To include the Big Four Member States;
4. To include all regions and recognizable blocs of the European Union with at least one member-state;

5. To include the five permanent member states of the UN Security Council.

Additionally, the list of countries that will be observed through the Index was confirmed through the qualitative research conducted at the beginning of the project implementation, following the number of mentions, i.e. highlighting the quality of certain countries as global players.

5. The process of weighing dimensions and variables

In determining the values of the dimensions and variables of the International Impact Index, experts were approached by conducting a survey. Although it is a subjective view, the survey for determining the values of dimensions and variables is a valid method⁴ used in other similar, composite indexes (Elcano Global Presence Index). At the same time, the method has its strengths and weaknesses compared to other statistical methods.

In making their decision, the project team considered all aspects and concluded that the survey could help gather relevant opinions from experts in the field, as well as to communicate the project, the research, and some of the findings.

Following the recommendations of international experts, the project team proceeded to prepare a list of verifiers that included domestic citizens of North Macedonia and foreigners. The list includes a total of 144 people, divided equally, 72 citizens of North Macedonia and 72 foreign citizens.

During the preparation of the list of verifiers, citizens of North Macedonia, the project team was guided by the following criteria:

1. The selected verifiers are representatives of six different focus groups:
 - Academic Community;
 - Business Community;
 - Civil Society;
 - Diplomats and Support Staff;
 - Politicians and Government Officials; and
 - Media Representatives.
2. The selected verifiers will be distributed in equal numbers in each of the target groups.
3. The selected verifiers, according to their ethnic structure, will correspond to the results of the last census.
4. In the focus group “Academic Community”, the verifiers, in addition to the ethnic structure of the population, represent the most important and larg-

est scientific, scientific-research and educational centers, hence the following were represented: National Academy of Sciences and Arts; “Ss. Cyril and Methodius” University; South East European University; American College University - Skopje; and the American University of Europe - FON.

5. In the focus group “Business Community”, the verifiers, in addition to the ethnic structure of the population, also represent the chambers of commerce, as well as several of the largest companies in several different sectors of industry, hence the following were represented: Economic Chamber of North Macedonia; Macedonian Chambers of Commerce; American Chamber of Commerce in North Macedonia; Chamber of Northwest Macedonia; European Business Association.
6. In the focus group “Civil Society”, the verifiers, in addition to the ethnic structure of the population, also represent the largest civil society organizations, especially think tanks from North Macedonia.
7. In the focus group “Diplomats and Support Staff”, in addition to the ethnic structure of the population, the verifiers also represent the following institutions: The Ministry of Foreign Affairs and the Secretariat for European Affairs, as well as several missions of foreign countries and international organizations in North Macedonia.
8. In the focus group “Politicians and Government Officials”, in addition to the ethnic structure of the population, the verifiers represent the largest political parties according to the results of the last parliamentary elections: VMRO - DPMNE, SDSM and DUI, and through their current or former ministers, members of parliament or officials for international relations within the party.
9. In the target group “Media Representatives”, the verifiers, in addition to the ethnic structure of the population, are leading journalists who deal with foreign policy and international relations from several newsrooms of electronic and traditional media.

In preparing the list of verifiers, foreign nationals, the project team was guided by the following criteria:

1. The selected verifiers are representatives of four different focus groups:
 - Civil Society and Academia;
 - Bilateral Diplomats;
 - EU and Multilateral Diplomats; and
 - Media Representatives.

⁴ Handbook on Constructing Composite Indicators: Methodology and User Guide; Joint Publication of the Organization for Economic Cooperation and Development and Joint Research Centre of the European Commission – 2008; <https://www.oecd.org/els/soc/handbookonconstructingcompositeindicators-methodologyanduserguide.htm>

2. The selected verifiers will follow the Index in its bilateral format and will be distributed in a way that will give priority to the first two focus groups. Each of the first two focus groups will have 26 representatives on the list. At the same time, from the remaining two target groups there will be an equal number of representatives to the total number of 72.
3. The selected verifiers, by origin, will be from those countries that the Index follows, as well as from other European countries that are on the list of 50 highest ranked countries according to the Elcano Global Presence Index, which includes verifiers from Belgium, Czech Republic, Denmark, Finland, Ireland, Norway, Portugal, Switzerland and Ukraine.
4. The selected verifiers will include verifiers from each of the ten top-ranked countries according to the Elcano Global Presence Index, which includes verifiers from Japan and Canada.
5. The selected verifiers will be distributed evenly to all countries, except for the highest ranked country according to the Elcano Global Presence Index, USA and the highest ranked European country according to the same Index, Germany, which will receive another additional verifier.
6. Within the target group “Civil Society and Academia”, the verifiers were selected according to the auxiliary criterion to represent the think tank member organizations of the two largest and most developed European networks: EPIN - The European Policy Institutes Network, TEPSA – Trans European Policy Studies Association, or be part of a large trans-European think tank organization such as ESI – European Stability Initiative and ECFR - European Council on Foreign Relations, i.e. to be part of other international lists of collaborators of large think tank organizations that are active globally such as the Carnegie Endowment for International Peace and The German Marshall Fund of the United States.
7. Within the target group “EU and Multilateral Diplomats”, the verifiers included representatives of the European Union and its institutions at three levels:

the European Parliament, the European Commission and the Directorate-General for Neighborhood and Enlargement Negotiations (DG NEAR), as well as other representatives of the security and development multilateral: including NATO, OSCE, OECD and Council of Europe.

8. Finally, the target group “Media Representatives” included well-known national print and electronic media through correspondents from the region, foreign policy editors and analysts, then news agencies through their headquarters and professional associations of journalists through their leaderships.

The process of consultations with the verifiers took place on a pre-determined dynamic and according to a previously prepared questionnaire on an electronic survey system. The initial communication consulting verifiers was established after the completion of the data collection and after the final structure of the Index was determined. Although the full list of surveyed verifiers contained 144 people, the project team expected that when it comes to the first attempt to develop the Index, i.e. a new organization, there will be no high turnout. At the end of the survey, one third of the verifiers responded to the survey and helped create the Index, for which we are grateful.

We are especially thankful to prof. Veli Kreci Ph.D. and prof. Marjan Petreski Ph.D. from the academic community of North Macedonia, Ivana Jordanovska, M.A., Marko Trosanovski and Bardil Jashari from the civil society in the country, prof. Ioannis Armakolas Ph.D., Vesela Cherneva, Stephen Blockmans Ph.D., Igor Bandovic, Adnan Cerimagic and Vladimir Bartovic from the civil society and the academic community of foreigners, Arta Tahiri and Biljana Spasevska-Georgievska from the community of media workers in North Macedonia, Andrew Byrne, Vassilis Nedos and Maria Antonia Sanchez Vallejo from the community of media workers from abroad.

6. Normalization of Data

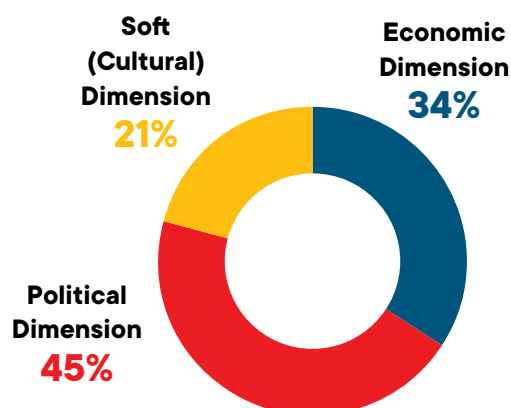
The normalization of the data needed to be done because the indicators that make up the index have different units of measurement⁵. Normalization of data was performed via z-value:

$$Z_{jc}^t = \frac{x_{jc}^t - x_j^t}{\sigma_j^t}$$

where x_{jc}^t is the value for the indicator j for the state c in the year t , x_j^t and σ_j^t are the average value and standard deviation of the indicator j in the year t , respectively. With this transformation all indicators are displayed in the same units and their normalized values have an average value equal to zero and a standard deviation equal to 1. Then, the extreme values of the indicators were detected and corrected in order not to allow them to have a stronger impact on the index than the other values. The detection of extreme values is done through a standard procedure for extreme values that determines those that are greater than three standard absolute deviations from the median value of the indicator. It detected a total of 23 extreme values in all indicators and they were corrected to a value of -3 or +3 depending on whether their value was extremely negative or positive. In this way, each indicator had a range of values between -3 and +3, and in order to be able to calculate the values of the index, i.e. not to cancel the negative and positive values when adding the indicators, an additional transformation was made

$\frac{Z_{jc}^t + 3}{6}$. With it, the values of each indicator are transformed into non-negatives with a range between 0 and 1. These transformations were not performed on the categorical indicators which have a value of 0 and 1. Additionally the values of all variables were multiplied by 1000 in order to avoid displaying the values in multiple decimals.

In this way, the transformed indicators, together with the categorical indicators, were used to calculate the index values. Moreover, in the case of variables that are consisted of multiple indicators, it is assumed that each indicator has an equal share in the variable. Then, to calculate the values of the countries by variables, weights are used that represent the value of each variable in the specified dimension of the index.



Graph 1. Shares of the three dimensions

The weights, i.e. the significance of each of the variables in the formation of the appropriate dimension, and then the index as a whole are obtained from the views of the surveyed experts. Thus, according to their estimates, the shares of the three dimensions in the index are the following: economic presence 34.3%, political presence 44.4% and soft (cultural) presence with 21.2%.

The experts also assessed the share of each of the variables in the individual dimensions of the index. The shares of the variables that make up the economic presence are the following: energy 16.8%, primary goods 12.9%, manufactures 11.9%, services 12.9%, foreign direct investment 19.8%, remittances 13.9% and development aid 11.9%.

Economic presence	Share
Energy	16,8%
Primary goods	12,9%
Manufactures	11,9%
Services	12,9%
Foreign direct investments	19,8%
Remittances	13,9%
Development aid	11,9%
Total	100,0%

Table 3. Overview of the values of each of the variables in the economic presence dimension

The shares of the variables that make up the political presence are the following: diplomatic relations 23.5%, foreign missions 20.4%, exchange visits 19.4%, bilateral cooperation 17.4% and military cooperation 19.4%.

⁵ Ibid 4

Political presence	Share
Diplomatic relations	23,5%
Foreign missions	20,4%
Exchange visits	19,4%
Bilateral cooperation	17,4%
Military cooperation	19,4%
Total	100,0%

Table 4. Overview of the values of each of the variables in the political presence dimension

The shares of the variables that make up the soft presence are the following: immigration 11.0%, tourism 17.0%, culture 13.0%, media 15.0%, social media 17.0%, technology 10.0%, science and research 8.0% and education 9.0%.

Soft (cultural) presence	Share
Immigration	11,0%
Tourism	17,0%
Culture	13,0%
Media	15,0%
Social media	17,0%
Technology	10,0%
Science and research	8,0%
Education	9,0%
Total	100,0%

Table 5. Overview of the values of each of the variables in the soft presence dimension

relations and international politics, and especially for the needs of analyzing the use of presence to exert influence, a quantitative public opinion survey was conducted. The research was according to a previously prepared questionnaire which contained 18 basic questions and 3 additional questions, and there were 2 questions conceived as a matrix in which a separate sub-question was asked for each of the countries that are monitored within the Index. The questionnaire was prepared based on the conducted qualitative research, through 46 structured interviews, conducted at the beginning of the project implementation.

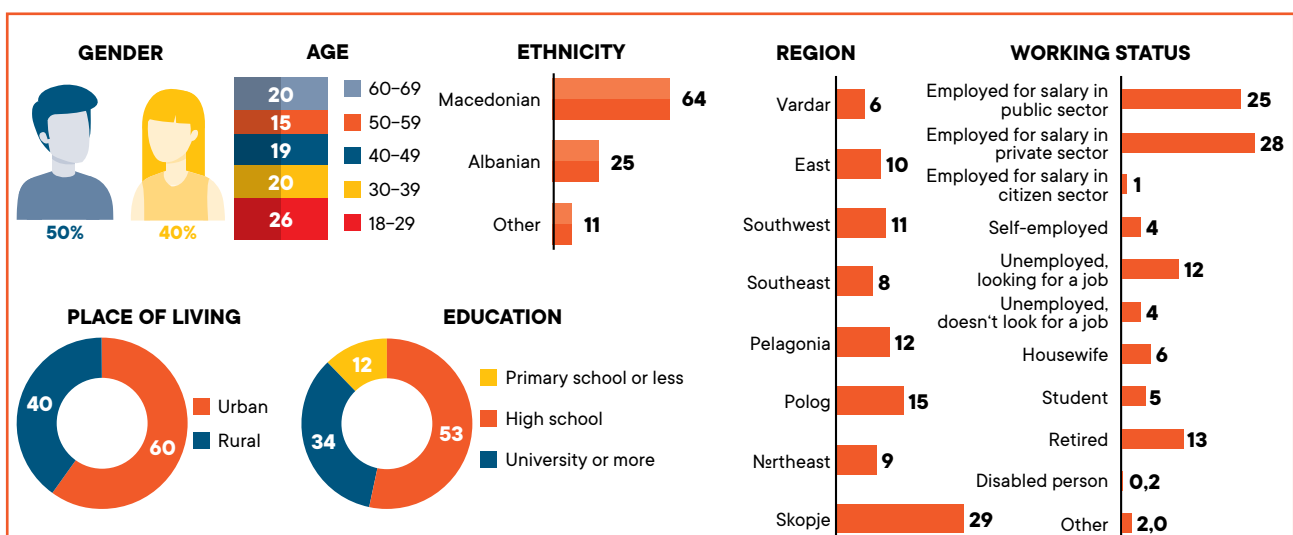
Both researches, the qualitative one at the beginning of the project implementation and the quantitative one at the end of it, were conducted by INDAGO agency. The qualitative research was conducted using electronic tools for communication and meeting, and 40 individuals from four different focus groups were contacted. Additionally, a model for qualitative research of ordinary citizens was developed.

The quantitative public opinion research was conducted using the method of computer-assisted personal interviews conducted by trained professionals. The research was conducted from 04 to 26 June 2020, on the territory of the entire country, on a representative sample of 1000 adult citizens.

The results of both researches will be used in the preparation of the profiles of the countries analyzed in the Index, as well as for a complete analysis of the international presence in North Macedonia and the use of that presence to gain influence.

7. Quantitative research on attitudes, perceptions and stereotypes

Finally, for the needs of gathering and researching the attitudes, perceptions and stereotypes about foreign



Graph 2. Representative sample for the quantitative research of attitudes, perceptions and stereotypes - Image Observatory 2020

IV. Is there room for concern?

The PRESPA Institute's International Impact Index is being developed for the first time this year. Hence, the calculation for 2019 is basic and shows the ranking of the presence of the selected 24 countries compared to the same for 2010, i.e. 2000. The calculation shows a stabilization of Turkey's presence, a return to the top for the United States and serious strengthening of Bulgaria's presence. The top three countries in the International Impact Index show their aggregate presence with 627.6 index points for Turkey, 610.2 index points for the United States and 600.3 index points for Bulgaria. The group of 600+ countries closes with the three highest ranked countries.

In 2010, Turkey was again the highest ranked country in the International Impact Index, this time with 588.8 index points. Second in terms of presence was Germany with 575.1 index points, and third was Serbia with 571.1 index points. The top three in 2000 were Germany, this time with 583.9 index points, followed by the United States with 580.3 index points and Slovenia with 546.1 index points.

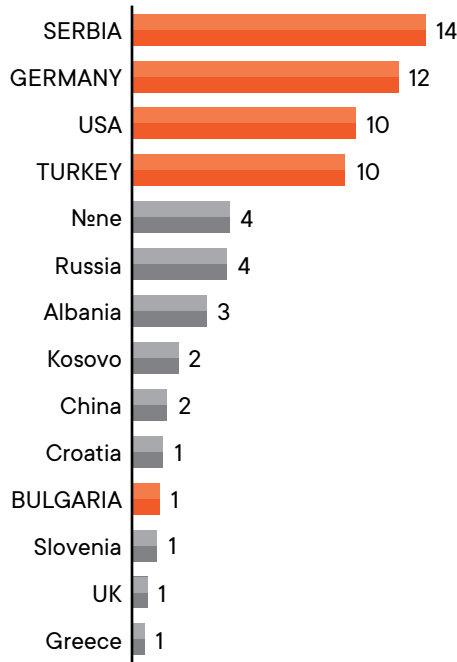
1. Geopolitically attractive country

Such a podium, particularly the two highest ranking countries in the Index for 2019, speaks about how geopolitically attractive North Macedonia is. After all, for the expert public, the United States, although no longer the only one, still remains a global power, while Turkey has been increasingly profiling itself as a global player.

Country	Index points	Rank
Turkey	627.6	1
USA	610.2	2
Bulgaria	600.3	3
Germany	583.6	4
Serbia	559.8	5
Slovenia	545.9	6
Italy	515.9	7
United Kingdom	495.3	8
Croatia	492.7	9
Albania	489.3	10
Greece	486.8	11
Russia	486.7	12
Austria	475.4	13
France	473.2	14
China	467.5	15
Romania	462.6	16
Hungary	462.5	17
The Netherlands	460.1	18
Kosovo	454.7	19
Poland	452.7	20
Bosnia and Herzegovina	442.9	21
Sweden	434.1	22
Spain	424.6	23
Montenegro	413.6	24

Table 6. International Impact Index, ranking for 2019

Germany (583.6) and Serbia (559.8) close the top five for 2019. The ranking of Germany in 2019 shows a tendency of decline in its presence, and is also the most serious decline that this country shows compared to 2010 and 2000. Serbia, on the other hand, returns to its original ranking of fifth place, down one place from 2000.



Graph 3. Image Observatory 2020 - Friendship

The objective presence of these five countries in North Macedonia, determined by the International Impact Index, can be identified in the attitudes and perceptions of the citizens as well. In the survey conducted by the Image Observatory for 2020, that is within this project, to the question

“In general, which country or international alliance, i.e. union are the biggest friends of North Macedonia?”, almost half, or 47%, recognized exactly these five as the greatest friends of the state. Thereby, the presence may be real, but only a deeper analysis and monitoring will show how effectively it has been used to make an impact.

The list of the top ten countries in the International Impact Index for 2019 is completed by Slovenia, Italy, the United Kingdom, Croatia and Albania. This composition of the list helps to draw four conclusions. First, the dominance of EU member states is more than obvious. In fact, the Union is recognized as the greatest friend of the state for almost one fifth of the citizens. Second, the presence of neighbors is noticeable, with three of the five direct neighbors (Serbia, Bulgaria and Albania) on the list, as well as the countries of the former Yugoslavia, again with three of the seven successors (Serbia, Slovenia and Croatia) on the list. Third, the old or western powers have a dominant presence in North Macedonia. Only three of the top ten countries are not members of the European Union (Turkey, Serbia and Albania)⁶, one is not a member of NATO (Serbia)⁷, i.e. four are not among the top 50 countries in the Democracy Index (Croatia, Serbia, Albania and Turkey)⁸, while one of them (Turkey)⁹ is on the border of authoritarian regimes. Fourth, the presence of two of the permanent members of the UN Security Council (USA and the United Kingdom)¹⁰, or three of the global players according to the ranking done in the Index, only confirms the geopolitical attractiveness of North Macedonia.

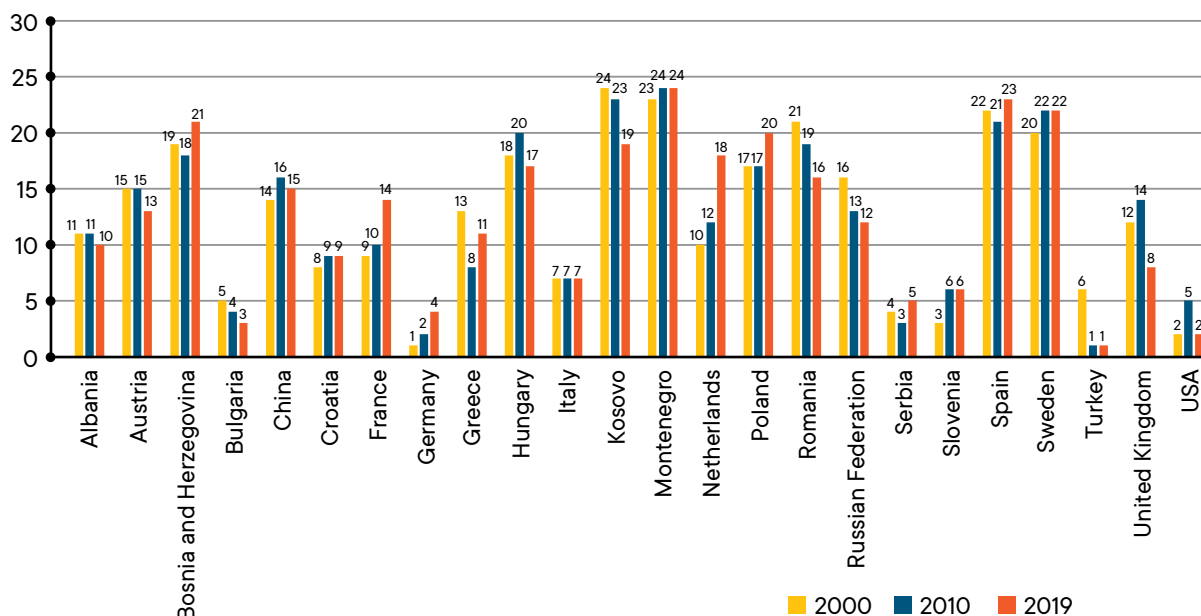
⁶ https://ec.europa.eu/neighbourhood-enlargement/countries/check-current-status_en

⁷ https://www.nato.int/cps/en/natohq/nato_countries.htm

⁸ <https://www.eiu.com/topic/democracy-index>

⁹ Ibid 8

¹⁰ [https://www.un.org/securitycouncil/content/current-members#:~:text=The%20Council%20is%20composed%20of,Belgium%20\(2020\)](https://www.un.org/securitycouncil/content/current-members#:~:text=The%20Council%20is%20composed%20of,Belgium%20(2020))



Graph 4. Overview of the ranking in the three years of the Index

In the remaining places of the next ten in the International Impact Index we find the remaining two neighboring countries (Greece and Kosovo), as well as the remaining two from the list of global players (Russia and China). The presence of Russia with 486.7 index points, as well as China with 467.5 index points is far below the level of other global players, i.e. the United States, the United Kingdom and especially Turkey. This ranking is only a reflection of that of the Elcano Royal Institute’s Global Presence Index¹¹, with the difference that the interest of the host country, North Macedonia and its foreign policy and positioning, as well as the geopolitical and geostrategic interests of the countries contributed to the differences in the ranking.

The first obvious difference is Turkey. The Elcano Global Presence Index for 2019 ranks Turkey 19th, although it has the most notable presence in North Macedonia. There is a noticeable difference in China as well. Besides China’s visible global presence, China ranks 15th in the International Impact Index. Similarly, France and Spain, which are ranked on the high 7th and 13th place respectively on the Elcano Index, are paced on the 14th and 23rd place respectively on the International Impact Index. Another notable difference is Italy’s global position versus that of the United Kingdom and the inversion of both countries’ positions in the International Impact Index ranking.

Country	Rank ELCANO ¹²	Rank PRESPA
USA	1	2
China	3	15
Germany	4	4
United Kingdom	5	8
France	7	14
Russia	8	12
Italy	11	7
Spain	13	23
Turkey	19	1

Table 7. Comparative ranking of global players and the G4

2. Stable trading partner

In the highest ranked countries according to the economic presence for 2019, there is almost no difference compared to the general ranking of countries. Of the top ten countries, only Croatia and Albania failed to make the list in terms of economic presence. Their places, when it comes to economic presence, are occupied by Greece and Austria.

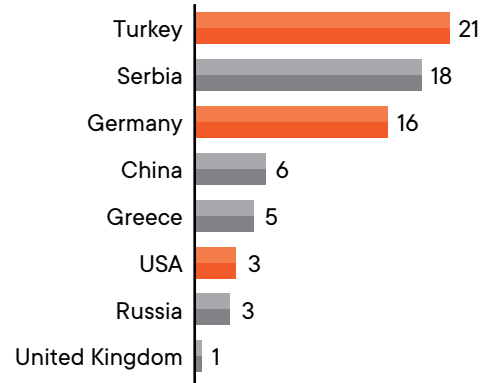
¹¹ <https://www.globalpresence.realinstitutoelcano.org/en/>

¹² Ibid 11

Country	Index points	Rank
Germany	670.5	1
USA	584.5	2
Turkey	583.7	3
United Kingdom	559.7	4
Italy	547.7	5
Greece	547.2	6
Serbia	539.2	7
Slovenia	522.3	8
Bulgaria	520.6	9
Austria	501.0	10
The Netherlands	488.6	11
China	482.2	12
Russia	473.7	13
Hungary	461.0	14
Poland	455.7	15
Croatia	445.9	16
Sweden	445.5	17
France	439.4	18
Romania	439.1	19
Spain	433.5	20
Kosovo	432.5	21
Bosnia and Herzegovina	431.6	22
Albania	428.1	23
Montenegro	420.4	24

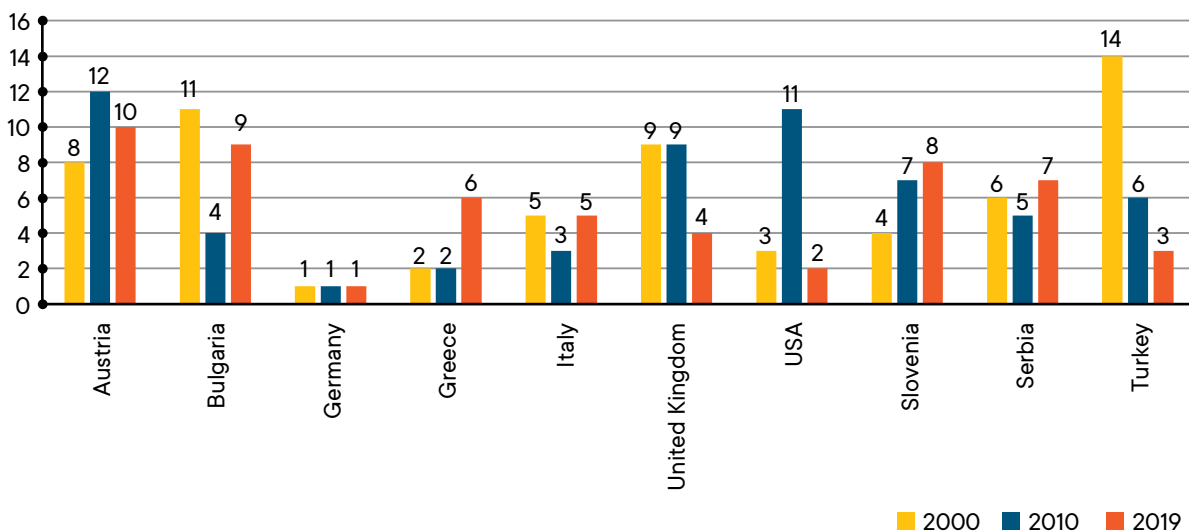
Table 8. International Impact Index, ranking for 2019 - Economic Presence

At the top of the table for 2019 is Germany with 670.5 index points, second is the United States with 584.5 index points, and third is Turkey with 583.7 index points. The top five is closed by the United Kingdom with 559.7 index points and Italy with 547.7 index points.



Graph 5. Image Observatory 2020 - Economic Partner

The objective presence of the countries that are on the podium for the economic presence in 2019 is confirmed by the public perception as well. In the conducted Image Observatory for 2020, on the question “**Which country is the largest economic or trade partner of North Macedonia?**”, up to 40% recognized exactly these three countries. Germany’s position at the top of the list is to be expected. Even globally, Germany is demonstrating a strong economic presence¹³. Its recognition in the public as a trading partner, as well as the consistency in the ranking at the first place according to the economic presence makes Germany our stable trading partner.



Graph 6. Overview of the economic presence over the years

¹³ Report on the global presence of the Royal Elcano Institute - 2018, Iliana Olivier, Manuel Gracia; pg. 14; https://www.globalpresence.realinstitutoelcano.org/en/data/Global_Presence_2018.pdf

The layout of the chart and especially the top ten countries help to draw three conclusions. **First**, the economic ties are strongest with neighboring countries. As many as three of the neighbors (Bulgaria, Serbia and Greece) are among the ten highest ranked countries in terms of the economic dimension, and there are strong ties with the countries of the former Yugoslavia as well. Let us recall that Serbia and Slovenia are in the group of top ten, while Croatia lags behind minimally. **Second**, developed countries, stable democracies and western countries are the main economic partners and investors in North Macedonia, and there is great dependence on the European Union. This is reflected in the presence of the EU's largest economy, Germany, which is undisputedly at the top of the index for the three years. The presence of Italy, the largest economy in southern Europe, further strengthens the ties. Of course, here we have the countries from the region as well, where with the exception of Serbia, all are member states of the European Union. Of course, there are countries in the region, where with the exception of Serbia, all are member states of the European Union. **Third**, Turkey is a serious economic partner of North Macedonia. Its recognition as such in the public is confirmed by most of the individual indicators and variables of the Index. Additionally, given the geographical position of Turkey, its economic ties, as well as other characteristics, Turkey is the main proxy partner of North Macedonia for the countries of the Middle East and the Arab world.

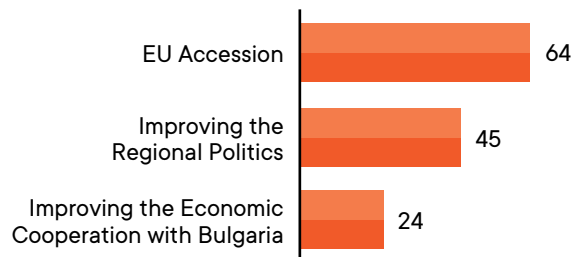
3. The new regional leader

In terms of political presence for 2019, the International Impact Index ranks Bulgaria in the first place with 676.5 index points. Turkey is in the second place with 645.2 index points, and Slovenia is in the third place with 609.5 index points.

Country	Index points	Rank
Bulgaria	676.5	1
Turkey	645.2	2
Slovenia	609.5	3
USA	581.5	4
Germany	522.6	5
Croatia	519.6	6
Russia	508.1	7
Serbia	506.3	8
Italy	504.4	9
Albania	503.9	10

Table 9. International Impact Index, Top Ten for 2019 - Political Presence

Closing the top five are the United States with 581.5 index points and Germany with 522.6 index points. By comparison, the top ten countries in the political dimension correspond to the general ranking for 2019. Only the United Kingdom is not in the top ten, and Russia appears in the top ten for the first time.

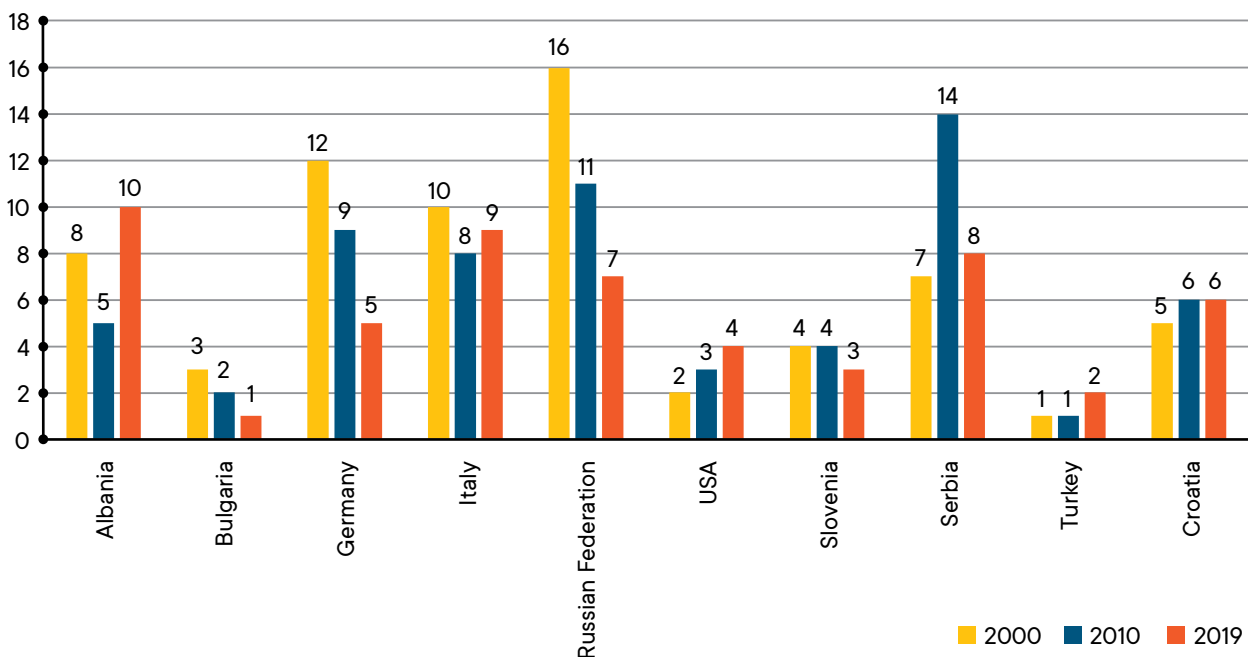


Graph 7. Image Observatory 2020 - Agreement with Bulgaria

Longitudinal analysis of the political dimension shows that the top five are stable at the top, and the change occurs in Germany, which gradually pushed out Croatia (fifth in 2000), and then Albania (fifth in 2010). Stabilizing the presence of Bulgaria and its ascent to the top in 2019 can be attributed to the Treaty of Friendship, Good-neighborliness, and Cooperation, signed in August 2017. The citizens, according to the Image Observatory for 2020, recognize the agreement as positive, and half of them expect that it will have the greatest effect on improving politics in the region. If we add to that the Bulgarian presidency of the European Union, and came at an extremely important moment for this country, then it is clear why Bulgaria is the new regional leader.

The layout of the chart and especially the top ten countries help to draw three conclusions. First, the geographic proximity and historical ties are paramount in achieving presence, and domination of neighboring countries (Serbia, Bulgaria, Albania and Greece) i.e. the former Yugoslav republics (Serbia, Croatia and Slovenia) is more than obvious. Second, the geopolitical attractiveness of North Macedonia is confirmed by the emergence of Russia. The political dimension is simple, does not require a strong economy and with little state investment a noticeable presence is achieved. If we add to this the consistency of the US involvement, then it becomes more than clear that the line of conflict of

the former US Secretary of State, John Kerry, is clearly drawn. Third, the withdrawal of official Washington from all of Europe puts Germany in the lead. Regardless of its economic presence, how things will go in our country and in the region is increasingly the task of Germany.



Graph 8. Overview of the political presence over the years

4. How Magnificent is the Turbo Folk?

Both globally and in North Macedonia, the soft or cultural presence shows the same tendencies as the economic one. Although their ranking is different, the countries in the top 10 are almost identical to those in the economic dimension. There is a difference only in two countries.

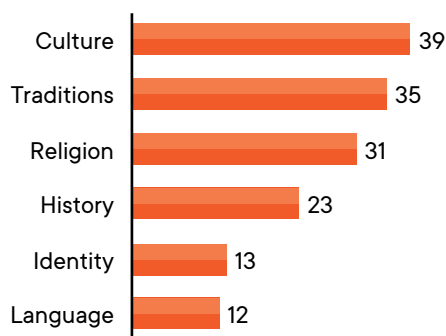
At the top of the list are the United States with 712.2 index points. They are followed by Serbia with 705.3 index points, which closes the list of 700+, while Turkey is in the third place with 661.6 index points. The first five are completed by Kosovo with 593.8 index points and Greece with 593.0 index points.

Country	Index points	Rank
USA	712.2	1
Serbia	705.3	2
Turkey	661.6	3
Kosovo	593.8	4
Greece	593.0	5
Germany	570.7	6
Bulgaria	569.4	7
Albania	557.6	8
Croatia	512.2	9
Italy	488.4	10
France	479.3	11
Russia	462.8	12
Slovenia	450.9	13
China	445.1	14
United Kingdom	442.6	15
Poland	433.0	16
The Netherlands	432.3	17
Romania	416.1	18
Spain	414.0	19
Austria	407.6	20
Montenegro	405.4	21
Sweden	396.7	22
Bosnia and Herzegovina	392.1	23
Hungary	381.7	24

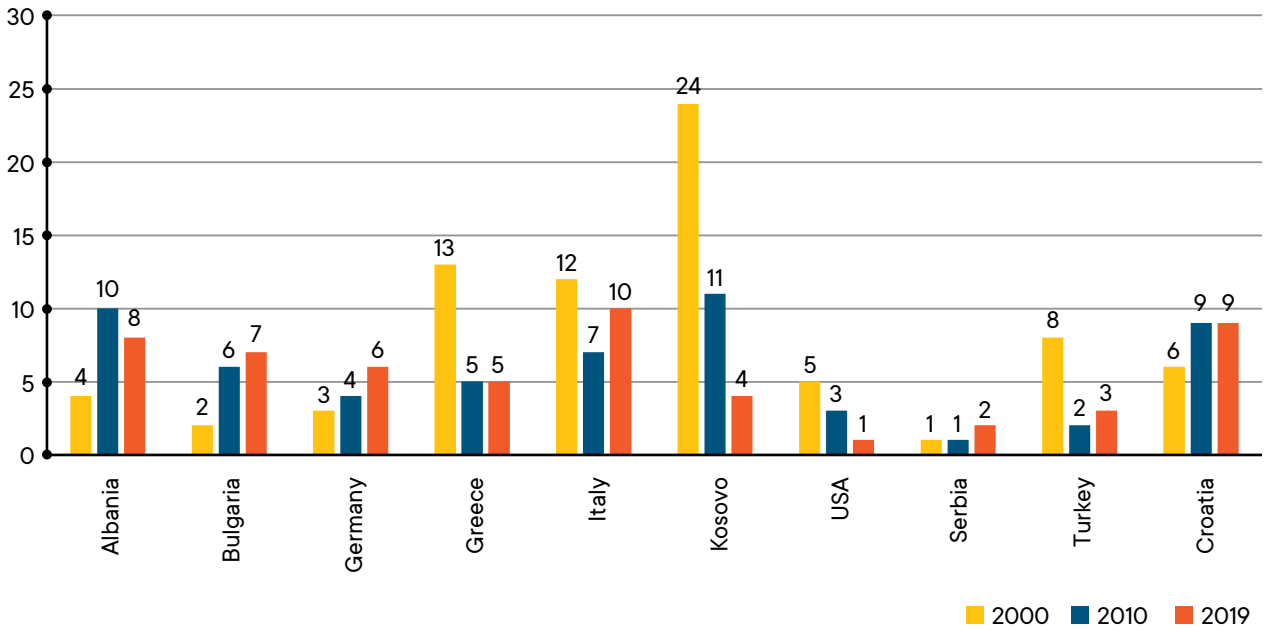
Table 10. International Impact Index, ranking for 2019 - Soft presence

In order to list the top 10 countries, we need to add Greece, Germany, Bulgaria, Albania and Croatia to the list. If we follow them longitudinally, then the change of places between, without a doubt, the same countries is visible. Differences appear in 2000 with the emergence of Bosnia and Herzegovina, France and Russia, which were ousted from the existing states, i.e. in 2010 by Slovenia, which no longer appears in the group.

To confirm this position, as well as the conclusion, we can use the research from the Image Observatory for 2020, where the question “What are the values that are common to North Macedonia and our closest partners?”, one third identifies culture, tradition and religion, while almost a quarter sees history as a common value. Moreover, looking at this through the prism of the states in the top five, it is obvious for whom, i.e. which country it is. The question we must ask ourselves is how magnificent turbo folk really is.



Graph 9. Image Observatory 2020 - Shared Values



Graph 10. Overview of soft presence over the years

Having in mind all the above, as well as the positioning of the countries, the analysis of the variables and indicators, i.e. the relations with the economic dimension, leads us to the following three conclusions. First, it is simple to maintain a high level of soft presence when you are geographically close and have other connections such as common language, religion, historical past and so on. Second, the clear tendency of North Macedonia towards the European Union, as well as the

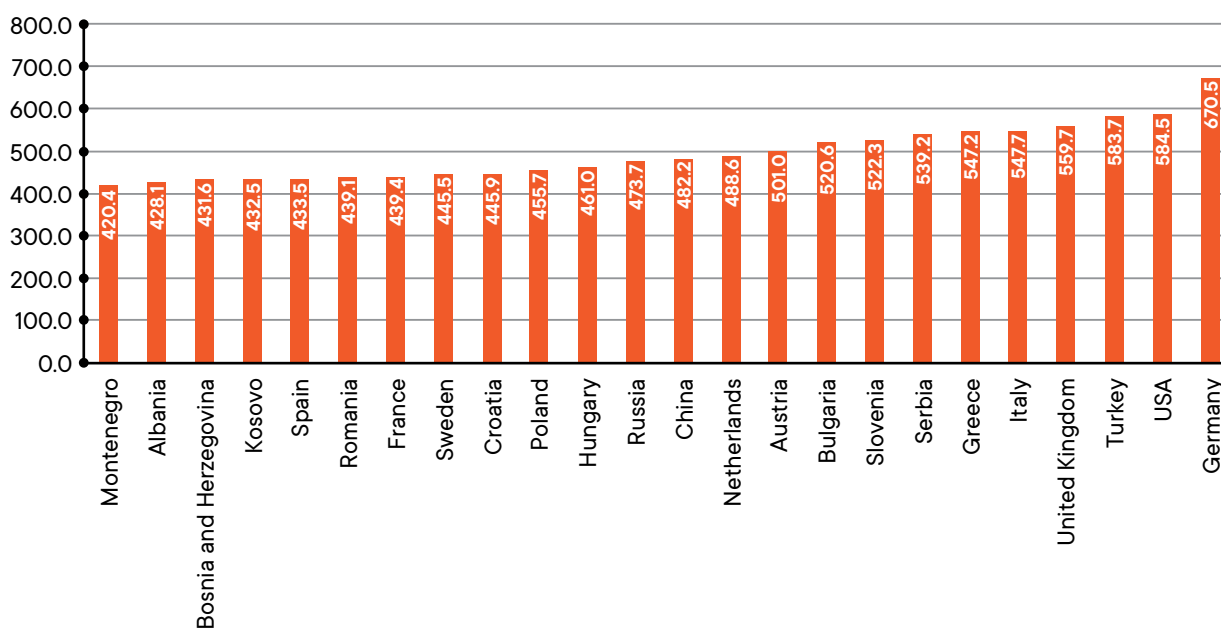
accession process will only improve the filtration of the results that are monitored within this dimension, which will significantly strengthen the European and Western presence. Third, given the ties to the economic dimension, then it is to be expected that in the near future we will see a new shift in this dimension and an improvement in the ranking and presence of the old democracies and Western economies.

V. Economic presence

Our neighboring countries do not have the strongest economic presence, but several large economies, that are global players such as Germany, USA, Turkey and the United Kingdom, do. Germany dominates in terms of economic presence in all the years of observations (2000, 2010 and 2019). It is our most important trading partner and one of the largest direct investors in the country. The presence of the United States is mainly focused on providing the highest amount of development aid to our country, but is significantly present through the import of energy and remittances as well. Over time, Turkey's presence has grown in terms of foreign direct investments, also a significant part of the primary goods and manufactures are imported from this country, as well as providing development aid to us. The United Kingdom has the highest number of foreign direct investments in the country, but are strongly present through the concentrated import of services as well. From the neighbors, Serbia, Bulgaria and Greece have a continuous significant economic presence in our country, but it is noticeable that their presence over the years is decreasing at the expense of larger economies. Other countries that have a more important economic presence in our country are Italy, Austria and Slovenia.

1. Germany at the top

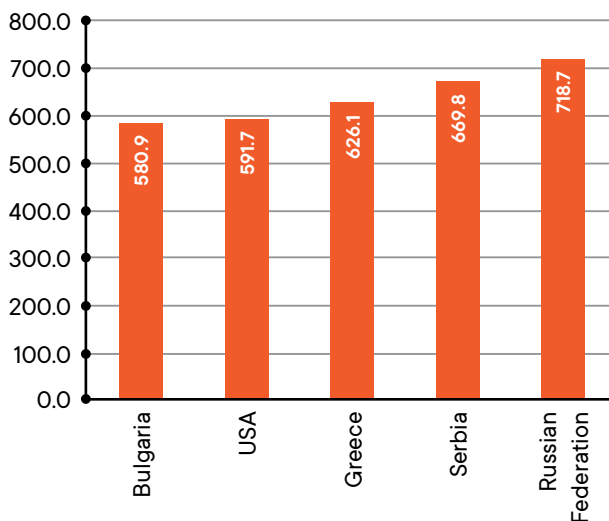
The country with the largest economic presence in North Macedonia in 2019 is Germany (670.5 points), which is also the largest economy in the European Union (EU). It is followed by three of the global players: USA (584.5 points), Turkey (583.7 points) and the United Kingdom (559.7 points). The fifth country according to our economic presence is Italy (547.7 points), another of the EU member states, which is also the largest economy in Southern Europe. From the sixth to the tenth place are dominated by EU member states that belong or gravitate in the Southeast Europe region, as well as our neighbor Serbia. The group consists of our neighbors Greece and Bulgaria, together with Slovenia, which was the most developed economy of the former Yugoslavia, and Austria, which has a serious economic presence in our region.



Graph 11. Economic presence in 2019

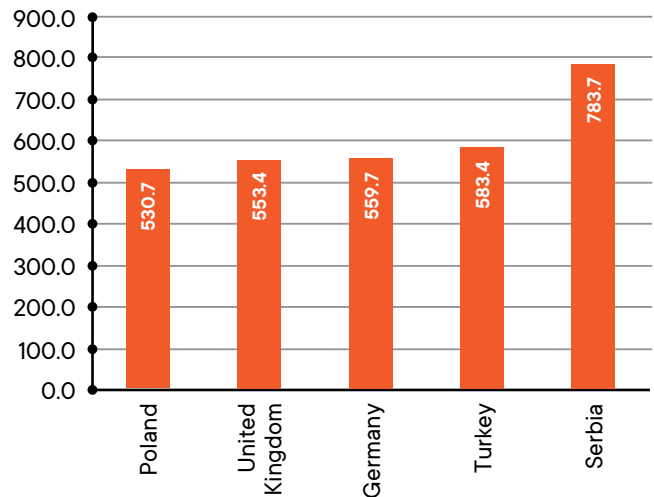
If these values of the index for the economic presence are compared with the results of the survey on the attitudes and perceptions of citizens, it can be seen that citizens perceive only some of the countries that are important economic partners of North Macedonia. Thus, to the question, who is the largest economic/trade partner of the country, the five most frequently received answers are: Turkey (21%), Serbia (18%), Germany (16%), I do not know (15%) and China (6%). From this we can see that citizens' perception of the economic presence of certain countries such as the United States, the United Kingdom and Italy, as well as neighboring Greece and Bulgaria is lower than the actual presence, while citizens' perception of China's economic presence is higher than the actual presence.

In continuation, each of the seven variables that make up the economic dimension of the index is shown. The variables of foreign trade are presented first, followed by foreign direct investments, remittances and development aid.



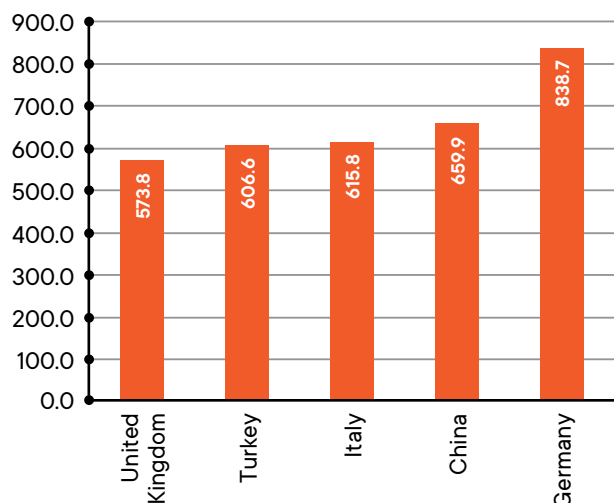
Graph 12. Energy imports in 2019

Energy imports are the second most important variable of the index, and it is known that the energy corridors represent the geopolitical positioning of large countries - global players. In the first five places according to the importance of energy supply in North Macedonia in 2019 are: Russia (718.7 points), Serbia (660.8 points), Greece (626.1 points), USA (591.7 points) and Bulgaria (580.9 points). This is the strongest presence of Russia in the economic dimension of North Macedonia. Imports from Russia mostly consist of natural gas, and a small part is accounted for imports of oil and coal. Imports from Serbia mostly consist of electricity, but oil, natural gas and coal are also present. Imports from Greece, USA and Bulgaria are dominated by oil imports, additionally from Greece and Bulgaria electricity and natural gas are imported, while from the USA a limited amount of coal is imported as well.



Graph 13. Import of primary goods 2019

The five countries with the largest presence in the import of primary goods to North Macedonia in 2019 are Serbia (783.7 points), Turkey (583.4 points), Germany (559.7 points), the United Kingdom (553.4 points) and Poland (530.4 points). Agricultural products and food have the largest contribution to the import of primary goods from Serbia and Turkey, while, from Turkey, the import of non-ferrous metals has a significant contribution as well. In the imports from Germany and Poland, the contribution of the import of food and agricultural products is the highest and almost equal, and beverages and tobacco are present, as well as non-ferrous metals. Non-ferrous metals are strongly dominant in the import of primary goods from the United Kingdom.



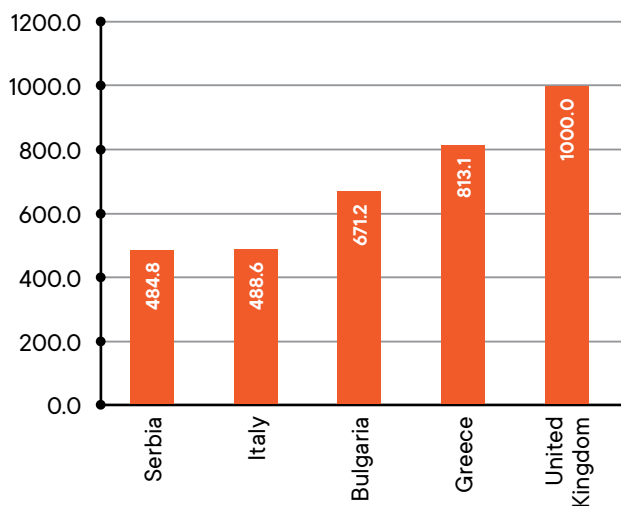
Graph 14. Imports of manufactures in 2019

The five countries from which North Macedonia imported manufactures the most in 2019 are Germany (838.7 points), China (659.9 points), Italy (615.8 points), Turkey (606.6 points) and the United Kingdom (573.8 points). Most of the imports from Germany are related to machines and machine parts, and a significant contribution is made by chemical products, transport

equipment as well as other manufactures and secondary products. Imports from China are dominated by machines and machine parts, and all other manufactures' groups are present, but with a much smaller share. Two groups of manufactures have the largest contribution to the import from Italy: non-metallic minerals and other manufactures and secondary products. In the import from Turkey all groups of manufactures are present, with the largest contribution from other manufactures and secondary products. Imports from the United Kingdom are strongly dominated by non-metallic minerals.

The five countries from which North Macedonia imported services the most in 2019 are the United Kingdom (838.7 points), Greece (831.1 points), Bulgaria (671.2 points), Italy (488.6 points) and Serbia (484.8 points). Of these, the United Kingdom and the two neighboring countries of North Macedonia, Greece and Bulgaria, which are EU member states, have a more significant share compared to the other countries.

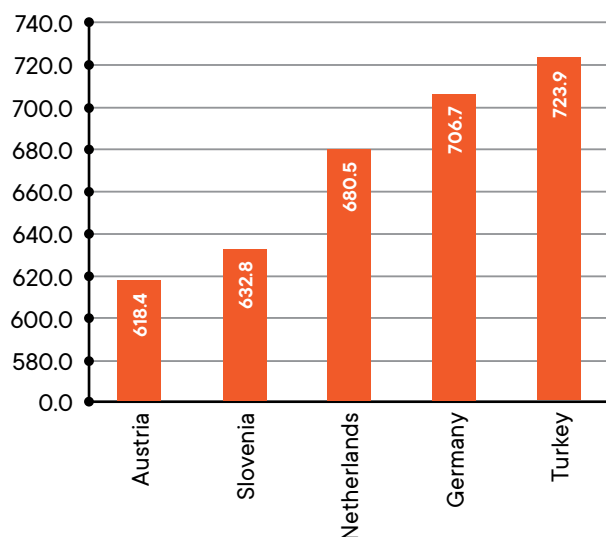
In the survey on attitudes and perceptions, the citizens point out only four important trade partners of North Macedonia in the import of services. These are: Serbia (27% of respondents), Turkey (22%), China (14%) and Germany (11%). Most respondents believe that the most important product of foreign trade with other countries is food (43% of respondents), and that the second most important are services (13%). This means that the citizens' perception of the importance of energy imports and manufactures is weaker than what the actual need in reality is.



Graph 15. Import of services in 2019

Foreign direct investment has the largest contribution to the countries' scoring in the economic presence dimension. The five countries with the highest inflow and state of direct investments in 2019 in North Macedonia are Turkey (723.9 points), Germany (706.7 points), the

Netherlands (680.5 points), Slovenia (632.8 points) and Austria (618.4 points). Turkey had the highest amount of foreign direct investments in North Macedonia in 2019. Similarly, a significant amount of foreign direct investment in the country in 2019 had Germany, the Netherlands and Slovenia, and common to all four countries is that they have a high cumulative state of investment in the country over the years. Also, Austria is a country that has a high level of foreign direct investment in North Macedonia in 2018, but in 2019 achieved a net outflow of direct investment from the country. Another such country that is worth noticing is the United Kingdom, which has the highest level of foreign direct investment in 2018, but in 2019 achieved the largest outflow of investment from the country. Common to six of the top seven ranked countries (excluding the Netherlands) in terms of inflows and the state of foreign direct investment is that they own capital in the country's banking sector.

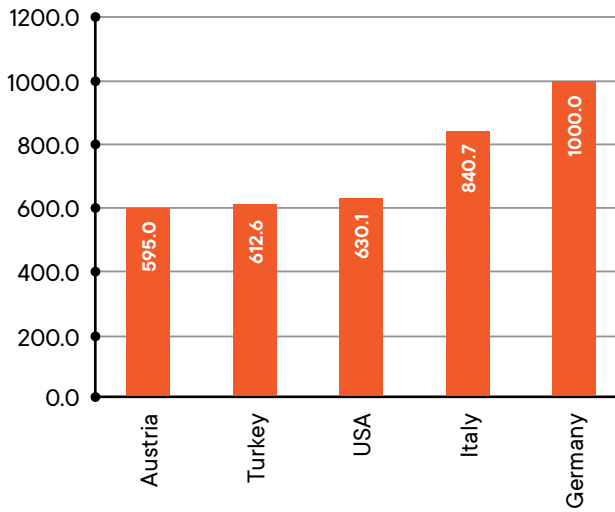


Graph 16. Direct investments, stock and inflow in 2019

In the survey on the perception and attitudes of citizens, the five most frequently highlighted countries in terms of foreign direct investment in the country are: Germany (35% of respondents), Turkey (14%), USA (12%), China (6%) and Greece (4%). According to this, the perception of the citizens about the presence of the Netherlands, Slovenia, Austria and the United Kingdom through direct investments in the country is lower than the real presence of these countries.

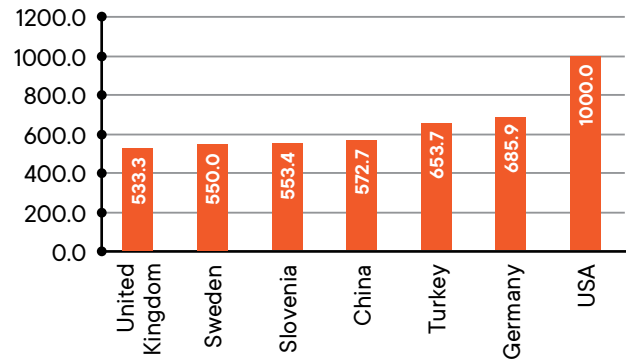
The five countries from which the citizens of North Macedonia receive remittances the most are Germany (1000.0 points), Italy (840.7 points), USA (630.1 points), Turkey (612.6 points) and Austria (595.0 points). There are several factors from which the level of remittances depends, and two factors were used in their assess-

ment: the number of emigrants from North Macedonia living in a particular country and the standard of living in the sending country, measured by gross national income per capita.



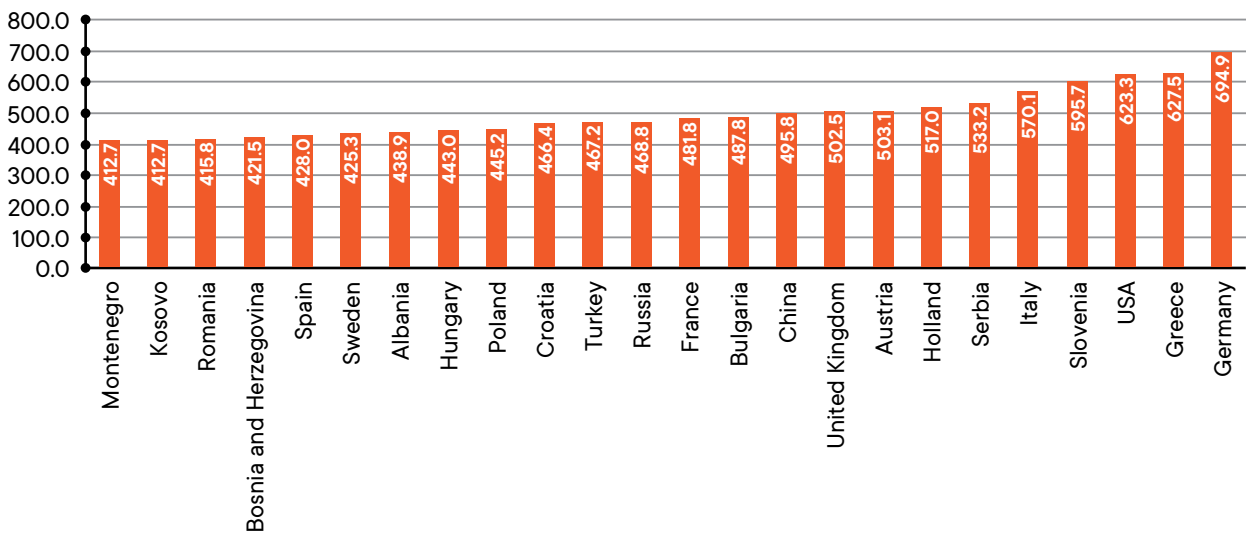
Graph 17. Remittances in 2019

The last factor of the economic presence of a certain country is the registered development aid in 2019. The highest development aid is provided by the United States, and six other countries provide more significant development aid in the country. These are: Germany, Turkey, China, Slovenia, Sweden and the United Kingdom.



Graph 18. Development aid in 2019

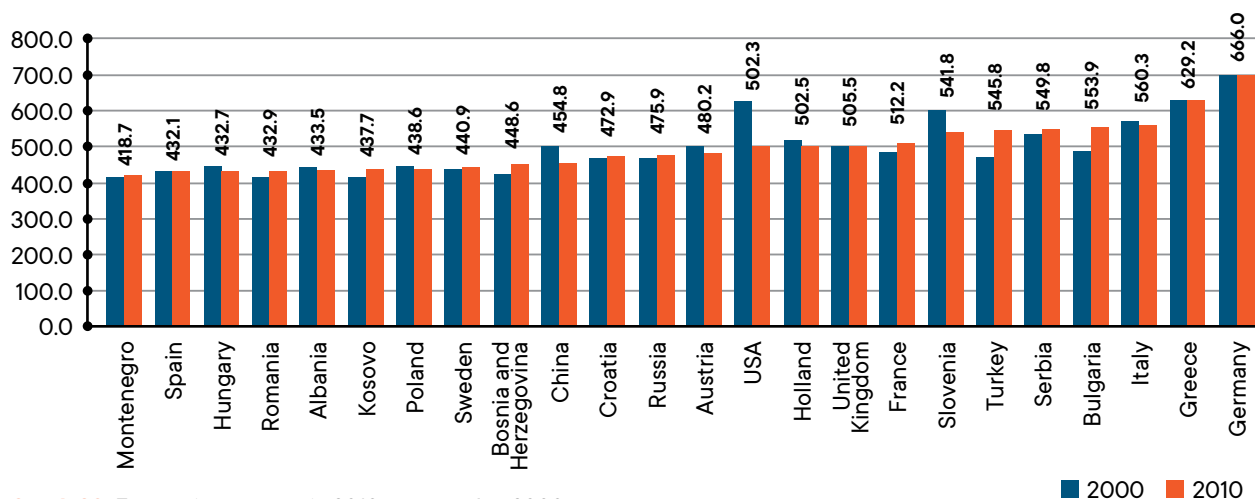
2. Changes over the years



Graph 19. Economic presence in 2000

Germany had the strongest economic presence in North Macedonia in 2000 (694.5 points). Neighboring Greece, which in 2000 was the only EU member state from the Southeast Europe region, had the second

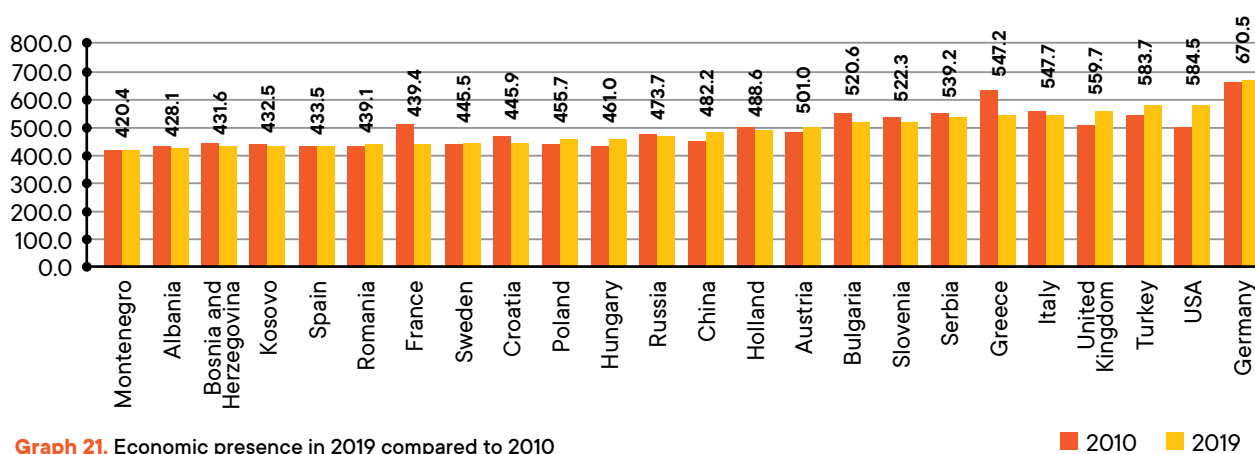
largest economic presence in the country (627 points). It is followed by the USA (623.3 points), Slovenia (595.7 points) and Italy (570.1 points).



Graph 20. Economic presence in 2010 compared to 2000

Germany and Greece maintain their dominant economic presence in North Macedonia in 2010. Significant increases in the economic presence in 2010 compared to 2000 are realized by: Bulgaria, which from the eleventh ranked country in 2000 becomes the fourth

ranked country in 2010, Turkey which from the fourteenth ranked country in 2000 advances to the sixth place according to the economic presence in 2010, and France, which rises from the twelfth-ranked country to the eighth-ranked.



Graph 21. Economic presence in 2019 compared to 2010

Germany's dominant economic presence has not changed in 2019 either. Significant increases in economic presence in 2019 compared to 2010 are achieved by: the United States, which similarly as in 2000 again has a significant economic presence and is just behind Germany, Turkey which continues the tendency to increase economic presence and comes in third place, and the United Kingdom, which jumps from the ninth to fourth place in terms of economic presence.

Significant reductions in the economic presence in 2019 compared to 2010 are noticeable by: Greece, which is reducing its economic presence primarily due to the debt crisis it has faced in the past decade, France, which falls from eighth place to eighteenth and Bulgaria, which moves from the fourth to the ninth place.

VI. Political presence

Most notable presence in the political dimension have this 3 countries, Bulgaria, Turkey and Slovenia. Over the decades, these three countries have mainly exchanged their positions on the pedestal. In 2019, Bulgaria is ranked first, in 2010 is in the second place, and in 2000 in the third. Turkey loses the first place that it has in 2000 and 2010 and in 2019 is in the second position. The third place in 2019 is for Slovenia, which is gradually taking over the top from the USA. Consequently, the political presence of Bulgaria over the years strengthens, while that of the United States weakens and in 2019 this country is in fourth place. Constant in the political dimension is Germany as well, who's presence is growing over the years and in 2019 is in fifth place. The large presence of Bulgaria is primarily due to its interest as a neighboring country, and in 2019 to the large number of exchange visits. Turkey, on the other hand, secures its political presence through the position with the largest contingent of soldiers and command personnel who participated in the military exercises held in Northern Macedonia. Given that Turkey has been a

clude why the political dimension is the basis on which relations between countries develop in each sectoral policy, or as we say "a good deal goes a long way."

Take for example the Agreement on the final settlement of the name dispute and strategic partnership with Greece, or better known as the Prespa Agreement. This agreement was signed on June 17, 2018, followed by the establishment of diplomatic relations between North Macedonia and Greece on May 31, 2019, i.e. the signing of 11 additional bilateral agreements. All this, however, was not enough for Greece to move from the last place of the International Impact Index, in the political dimension for 2019. However, if we start from the fact that this dimension is the basis, then Greece, regardless of being in the last place, can only progress in the future.

At the top of the list of the International Impact index for 2019, in the political dimension, the first place is occupied by another neighboring country, Bulgaria. Even in this case, Bulgaria's presence in this dimension can

Country	2000		2010		2019	
	Rank	Index points	Rank	Index Points	Rank	Index points
Bulgaria	3	559.0	2	575.9	1	676.5
Turkey	1	584.4	1	616.3	2	645.2
Slovenia	4	547.6	4	549.9	3	609.5
USA	2	567.6	3	562.7	4	581.5
Germany	12	504.3	9	510.3	5	522.5

Table11: Political presence over the decades

longtime partner of the country and now a NATO ally, a strong political presence is entirely to be expected.

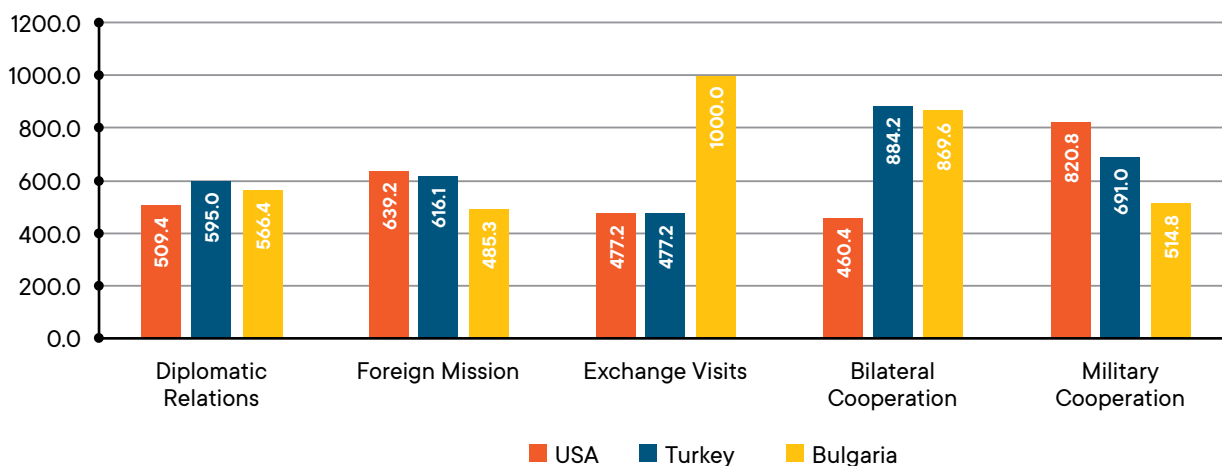
1. A good deal goes a long way

In conditions when you make an analysis of the international presence of a new state, whose democracy and institutions are developing, then it is perfectly clear why the political dimension is so important. Even in the survey of the experts on the evaluation of dimensions and variables, this importance was noticeable and confirmed. If we take into account the identified variables and individual indicators, then it is even easier to con-

be attributed to an agreement, the Good Neighbor Agreement of August 1, 2017. The results of this agreement are multifaceted, but for the needs of the analysis of the political presence, several should be singled out. First, the intensification of bilateral cooperation with Bulgaria and the signing of 5 additional bilateral agreements. Then, the intensity of the exchange visits, as well as the holding of a joint session of the governments of the two countries. Of course, this progress was also influenced by the period in which the agreement was signed and the fact that Bulgaria held the presidency of the Council of the European Union immediately afterwards. Finally, the establishing of stable partnership relations through the co-chairing of the Berlin Process

for the Western Balkans during this year contribute to further strengthening the presence and stabilizing the first position.

(27%) recognize these 5 countries with which we share the most values and interests (economic development, culture, tradition, history, language, identity, religion,



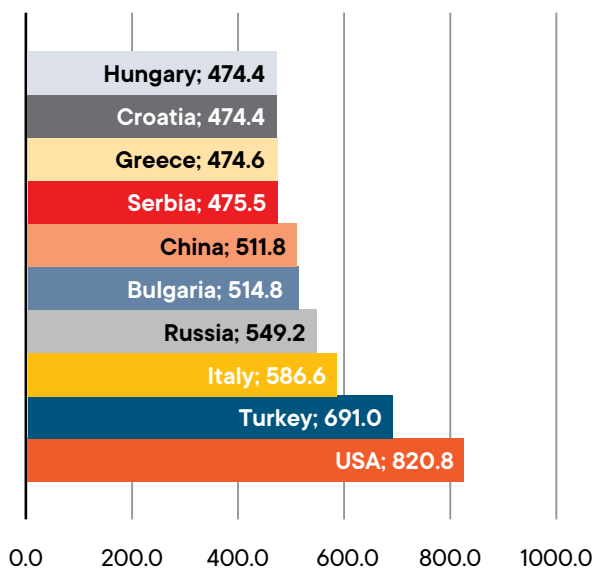
Graph 22. Presence in the political dimension broken down by variables

The longitudinal analysis of the presence of the states in the political dimension indicates the gradual strengthening of Germany, i.e. the weakening of the profile of the United States of America. Namely, Germany in 2000 is not in the top ten countries, and in 2010 it barely appears in the list. In 2019, Germany is the fifth highest ranked country in the political dimension. The United States, on the other hand, is in the second place in 2000, third in 2010, and fourth in 2019. Reflected in the global trends, the gradual withdrawal of the United States from Europe, linked to Germany's initiative and leadership within the European Union, then it is clear how such a change occurs. According to many experts, Germany was given the task of taking care of the Western Balkans and defining the region's relationship with Western democracies. The latest news from the European Union and the new German Presidency regarding the opening of negotiations with North Macedonia and Albania only confirm this thesis.

To close the top five, we have two more countries left. The first is the stable and quiet Slovenia, with the most constant presence over the years. With its historical ties, common past, geographical proximity and intensity of bilateral cooperation, Slovenia successfully compensates for the small diplomatic mission and the insignificance of military cooperation. The second is Turkey, which according to this Index, but also according to its many characteristics, belongs to the group of global players, and shows a stable presence over the years, especially in the political dimension.

If we see presence through the prism of influence, then the first five are clearly recognizable to the public. According to the Image Observatory for 2020, slightly more than a quarter of the citizens of North Macedonia

security etc.), i.e. more than one third (37%) recognize them as countries that have invested in economic development and development of the democracy in North Macedonia.



Graph 23. International Impact Index 2019, Military Cooperation

An interesting variable within the political dimension is military cooperation. In this variable, which contains three individual indicators, three of the several extremes can be observed in the whole dimension. The first extreme is shown by the United States through its position as the largest donor of aid to military equipment and weapons. The second is Turkey, through its position with the largest contingent of soldiers and command personnel who participated in the military exercises held in North Macedonia. Hence, justifiably, at the top of the list are three NATO allies, the United

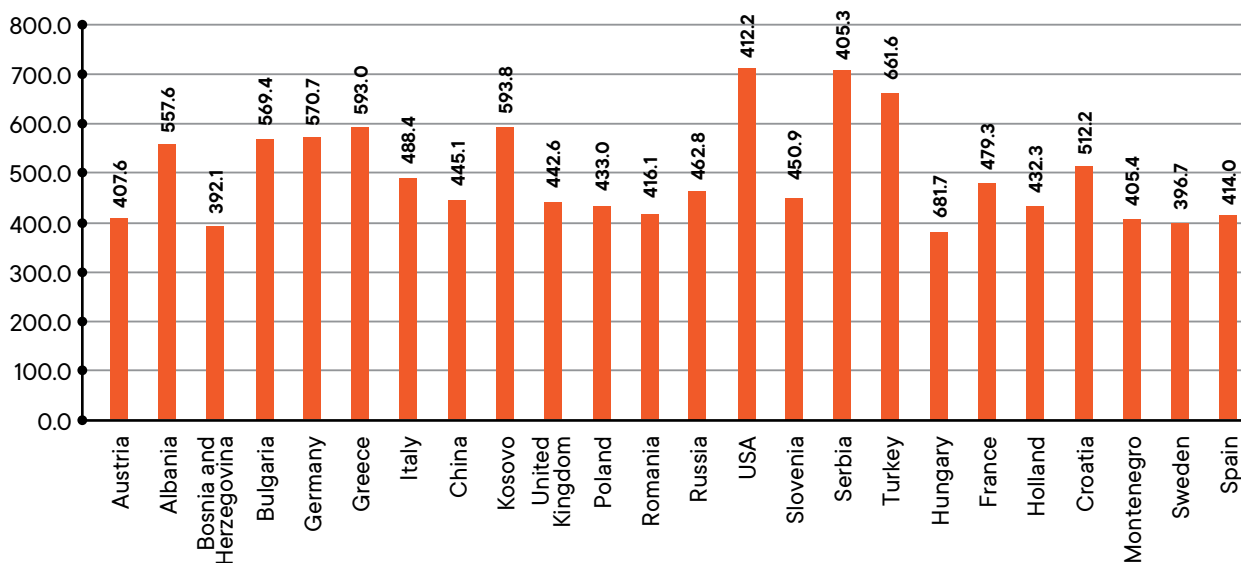
States with 820.8 index points, Turkey with 691 index points and Italy with 586.6 index points. Such a presence is expected, of course justified as well, especially given the signing of the Accession Protocol with NATO on February 6, 2019. The same shows that the southern wing of the alliance is strong enough in the 30th member state.

However, Russia's fourth place leaves room for concern. This is related to the third extreme data, i.e. the largest contingent of military-diplomatic personnel deployed in the country. In the conditions of a small and professional army, with weak armament such as ours and in a small, continental country, that is a clear indicator of three things. **First**, investing in a political presence is simple and inexpensive. **Second**, Russia has the human resources it can use, and it does. **Third**, obviously Russia has an interest in such investment.

VII. Soft (Cultural) presence

The largest presence in the cultural dimension, in Northern Macedonia, is achieved by the most important cultural center in the world and of course the American culture. This result is a consequence of the great technological development and consumer culture of our citizens, as well as the fact that the United States is a common part of public discourse. The second place is held by Serbia, a neighboring country that shares with us a relatively long period of common history and is also a traditional scientific and research partner. In third place, again Turkey, which appears as an extreme

when it comes to cultural closeness. According to them, “Macedonia is not homogeneous in cultural terms, and different cultures or segments of cultures have different meanings for different demographic groups.” One thing is clear, a quick analysis of attitudes and perceptions shows that Serbia, Bulgaria, Turkey, and Albania or Kosovo have the greatest influence. Having said that, we are under attack, by turbo folk, from all sides, and the synchronization of Turkish series is the main source of funds for many of our actors.



Graph 24. Soft (cultural) presence for 2019

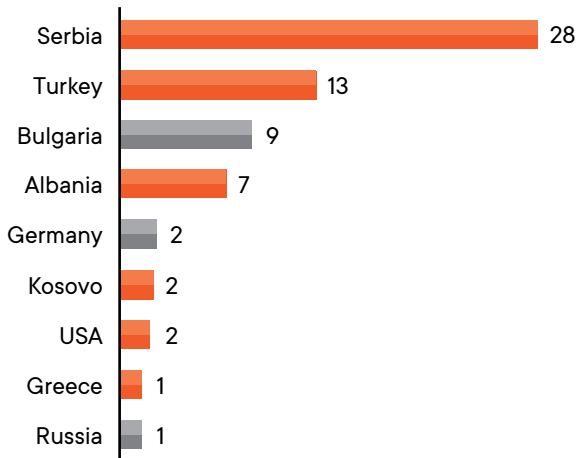
in three variables, only confirms the dominance of this country throughout the Index.

1. The culture pinnacle is after all in Hollywood

Given that it shows similar tendencies as the economic presence, the soft or cultural presence shows a similar result in relation to the countries that appear among the ten highest ranked. In the qualitative research conducted within the Image Observatory for 2020, the public recognizes groups that have their own priorities

Putting aside the influence, if we talk about presence, then “majority of the young people speak English, and culture spreads through the language”. From there, for North Macedonia, the cultural peaks are in Hollywood and the suburbs of San Francisco, or in New York and Atlanta, while the main tool it the little blue bird that “has an expert solution to every problem”. According to the International Impact Index, the United States tops the list for soft or cultural presence with 712.2 index points. Serbia with 705.3 index points and Turkey with 661.6 index points are also on the podium.

In the top five are Kosovo with 593.8 index points and Greece with 593.0 index points as well. As expected, as many as three neighboring countries, Serbia, Greece and Kosovo are at the top of the table.

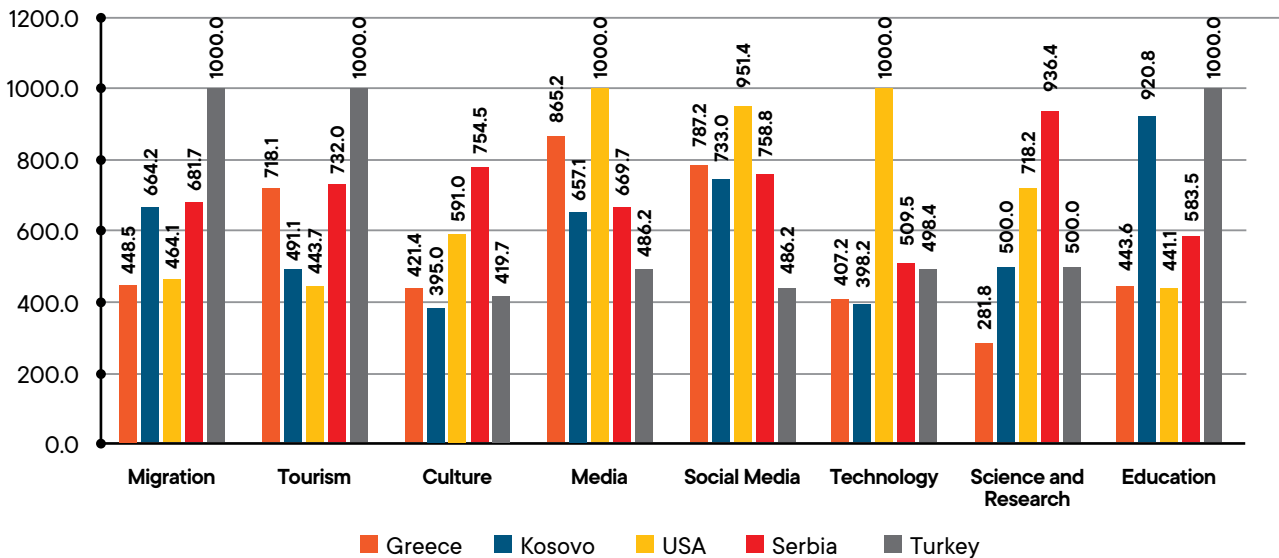


Graph 25. Image Observatory 2020 - Countries and cultures with the greatest impact on North Macedonia

The index values confirm the results of the Image Observatory for 2020. Namely, almost half of the respondents (47%) believe that these five countries have the greatest impact on the culture in the country. To the question: "Which country, in terms of its culture, has the greatest influence on North Macedonia?" almost a third

think that it is Serbia and 13% think that it is Turkey. 7% of the respondents voted for Albania, while for the USA and Kosovo voted, 2%, i.e. for Greece voted 1% of the respondents.

According to the International Impact Index, Hollywood may be at the top, but it still does not weigh the most. The United States is a global power not only in armaments and military presence, but also in technological development. Therefore, it is to be expected that the consumption culture of the citizens of North Macedonia expressed through the changing technology and the volume of applications for protection of industrial property rights will place the USA in the first place. However, looking in real life and making an impact, Twitter and Facebook, as the main tools on which our citizens "resolve most of this country's problems" are where the presence of the United States of America is greatest. Quite naturally, as a consequence of the presence in the variable social media, and of course as a consequence of the quality of the journalism, the USA is at the top in the variable dedicated to the traditional media as well.



Graph 26. Presence in the soft dimension broken down by variables

Serbia's presence is based on the traditional connections of scientific research centers, as well as the linguistic closeness. Hence, Serbia is at the top in terms of the science and research variable. This neighbor of ours maintains a high presence in the social media and media variables, while the linguistic closeness, the memories of former Yugoslavia and all that turbo folk maintain a high presence in the variable culture as well. Finally, the effect of the economic cooperation between Serbia

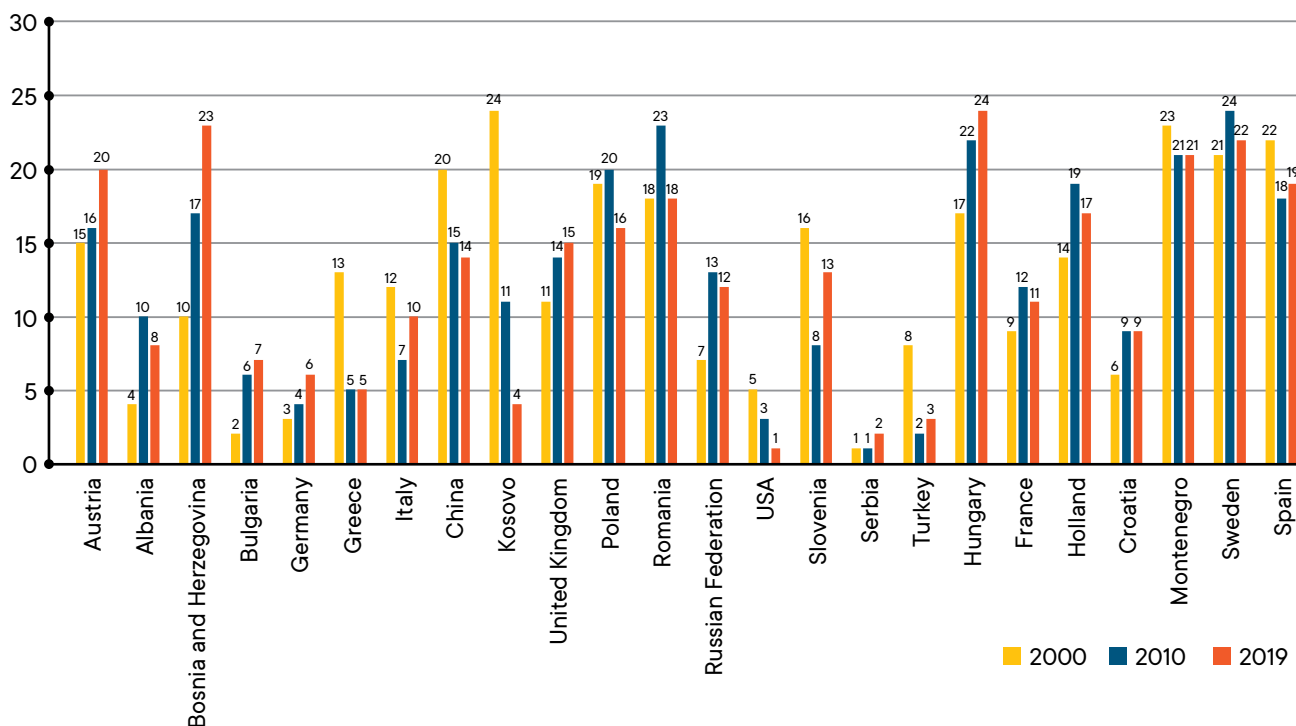
and North Macedonia is reflected in the soft presence with the position of Serbia in the technology variable.

The analysis of the soft presence of Turkey shows that this country behaves as a traditional extreme in this dimension. Turkey stands out in three variables, tourism, migration and education. Thereby, for every 10 tourists from the countries included in the Index, almost two or 1.78 tourists from Turkey visited North Macedonia. Looking at the second extreme, it can be concluded that as

much as 40% of the total number of foreign nationals from the countries monitored by the Index, who have regulated stay in North Macedonia are Turkish nationals. We can notice a slightly more emphasized situation in terms of the variable education, where for every 10 foreign students from the countries followed by the Index, who study at universities in North Macedonia, five are citizens of the Republic of Turkey.

Longitudinal analysis of this dimension, of the presence of other countries in North Macedonia, shows a gradual strengthening of the presence of the United States of America, which from the fifth position in 2000 this year is at the top. Similar to the United States, Greece and Kosovo are visibly strengthening their presence

in the three years of the Index. Thus, from the 13th or last place on the Index in 2000, these two countries are now on the fourth and fifth place, respectively. In the case of Kosovo, it is by far the largest leap a country makes in any of the dimensions of the International Impact Index. Similar to these two countries, but with a much smaller leap compared to 2000, Turkey is manifesting its presence. A different trend is shown by Germany, Bulgaria and Croatia, which have significantly reduced their presence compared to 2000 i.e. 2010.



Graph 27. Overview of soft presence over the years

Compared to 2000 and 2010, when Germany was in the top five countries in this dimension, in 2019, Germany is in sixth place. Over the years, Bulgaria has dropped from second place in 2000 to seventh place in 2019. While, Croatia in 2000 was in sixth place, in 2019 is in ninth place.

Finally, it is interesting to mention two other countries in the global player group, Russia and China. None of them

has a noticeable presence in this dimension. Russia is no longer part of the top 10 countries in this dimension, and its presence is based solely on cultural exchange and a little on public discourse and mention in the media and on social networks. China, on the other hand, has shown a slight growth, though not enough to join the top ten. Its presence is only visible in the variable technology, where she sits in the high second place.

Image Observatory 2020

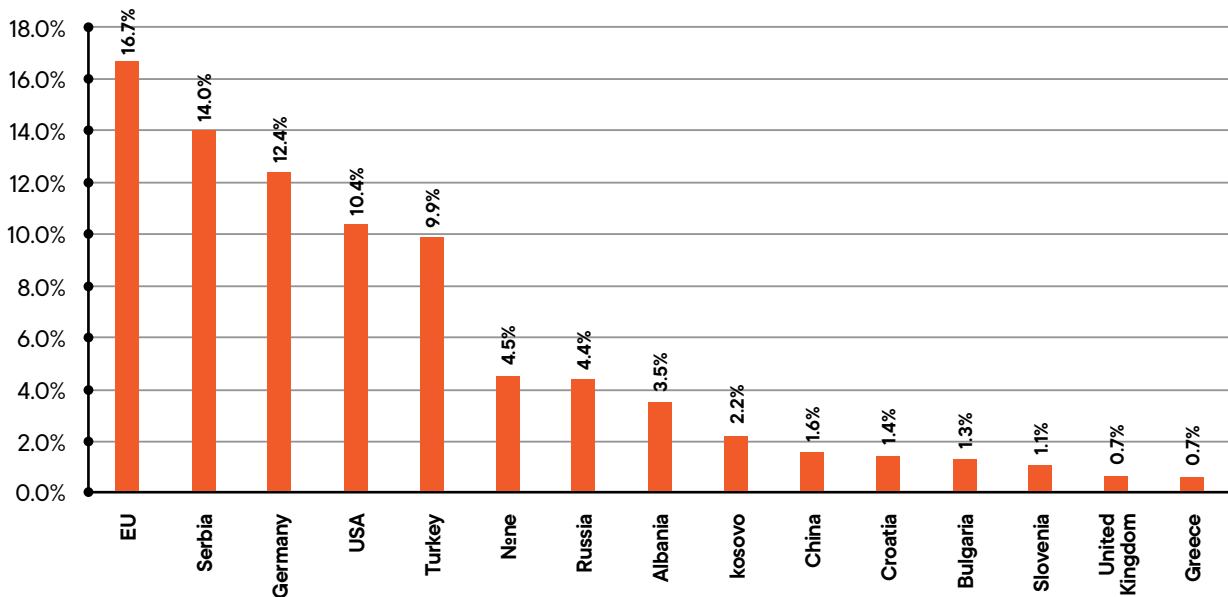


VIII. Image Observatory – attitudes

In this part of the analysis we will address four questions that were part of the survey. Through the first two questions we wanted to get a better picture of what is the perception of our citizens about which countries they see as our greatest allies, i.e. with which countries or alliances/unions we have the most common values/interests. The second two questions are related to the views of the citizens on two important agreements that the Republic of North Macedonia signed in the past two years, the Agreement on Good Neighborliness, Friendship and Cooperation between the Republic of North Macedonia and Bulgaria and the Prespa Agreement, or

1. The friendship between the past and the future

In the first question “**In general, which country or international alliance/union is Macedonia’s best friend?**”, an internal dilemma of our citizens is noticeable in what is needed in the future in order to forget the past. The highest percentage of citizens 16.7% said that the European Union is best friend to North Macedonia. They are followed by our neighbor Serbia with 14%, Germany with 12.4%, USA with 10.4% and Turkey with 9.9%.



Graph 28. Image Observatory 2020 – North Macedonia’s best friend

Final Agreement for the settlement of the differences as described in the United Nations Security Council Resolutions 817 (1993) and 845 (1993), the termination of the Interim Accord of 1995, and the establishment of a Strategic Partnership between the Parties, i.e. between the Republic of North Macedonia and Greece.

In order to get a deeper picture of the perception of different categories of citizens, in addition to the general analysis, we cross the four questions with the demographic data (ethnicity, age, level of education and party affiliation).

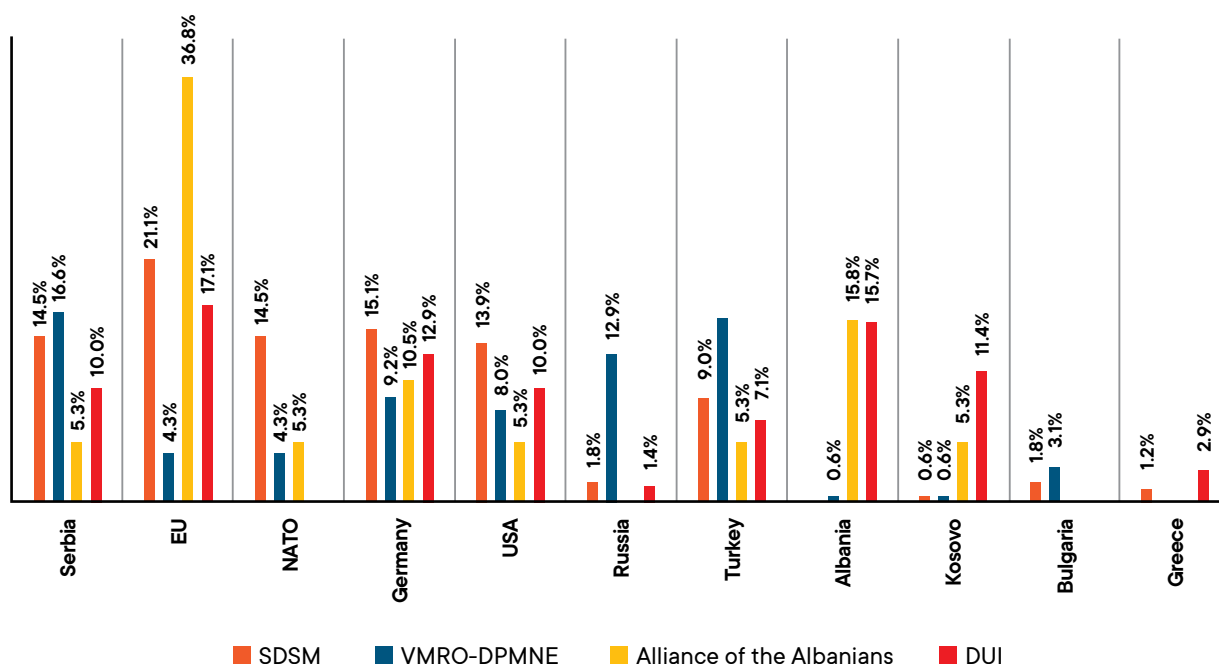
The analysis of the answers according to the level of education does not show a significant difference. Citizens with higher and secondary education think that Macedonia’s biggest friend is the European Union, followed by Serbia, while citizens with primary education think that Serbia is best friend to North Macedonia (15%), followed by the EU with 13.3%.

From the aspect of age, all age groups consider EU as the best friend of North Macedonia, only the citizens from the 60 to 69 years age group think that Serbia is our best friend.

There is a significant difference in the answers to this question according to the ethnicity of the respondents. The highest percentage of Macedonians (16.1%) believe that Serbia is best friend to North Macedonia, followed by Germany with 12.9% and the EU with 12.7%. Albanians predominantly (27.5%) believe that the EU is Macedonia's best friend, followed by Albania with 13.1% and Germany with 10.4%.

There is a big difference according to the party affiliation of the citizens as well. From the Macedonian bloc of parties, most of the SDSM supporters (21.1%) believe that the EU is biggest friend to North Macedonia, followed by Germany with 15.1% and then NATO

and Serbia with 14.5% each. Most of the supporters of VMRO DPMNE (16.6%) believe that Serbia is the biggest friend of Macedonia, followed by Turkey with 16% and Russia with 12.9%. It is important to mention that only 4.3% of VMRO DPMNE supporters believe that the EU is Macedonia's best friend. The same percentage goes for NATO as well. In the Albanian bloc of parties, the largest percentage of DUI supporters said that the EU is biggest friend to North Macedonia, followed by Albania with 15.7% and Kosovo with 11.4%. 36.8% of AA supporters believe that the EU is biggest friend to North Macedonia, followed by Albania with 15.8%.



Graph 29. Image Observatory 2020 – North Macedonia's best friend, party affiliation

2. Values and interests versus values or interests

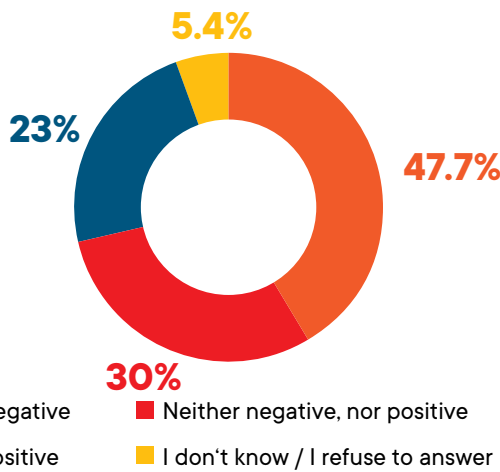
Through the question **“In your opinion, with which country or international alliance/union does the Republic of North Macedonia have the most common values / interests and therefore should cultivate the closest relations?”** we wanted to find out how citizens perceive Macedonia's friends and what they expect from them. The analysis pointed to two trends. The first is the sharing of values and interests. The second talks about sharing values or interests. To understand them, we need to look at the numbers.

The highest percentage of citizens believe that the Republic of North Macedonia has the most common values with Serbia 27.8%, followed by the European Union with 17.7% and Germany with 7.9%. Related to this question, we asked them what are the values/interests that connect us with the state or the alliance/union.

The question was open and the respondents could suggest more answers. Of the respondents who pointed to Serbia, 63% believe that religion is our greatest common value, followed by tradition with 60%. Among the respondents who pointed out the European Union and Germany, they see economic development as the dominant interest with 87%, followed by security with 53% among the respondents who chose the European Union, i.e. 53% among the respondents who pointed to Germany.

3. Who is undermining the good neighborliness?

The third question is related to the citizens' assessment of the Agreement on Good Neighborliness, Friendship and Cooperation between the Republic of North Macedonia and the Republic of Bulgaria. The question was asked on a Likert scale from 1 to 5, where 5 means completely positive and 1 completely negative evaluates the agreement. 23% of the respondents evaluated the agreement positively (with 4 or 5), 30% evaluated with a 3, and even 42% of the respondents evaluated the agreement negatively (answered 1 or 2).



Graph 30. Image Observatory 2020 - Agreement with Bulgaria

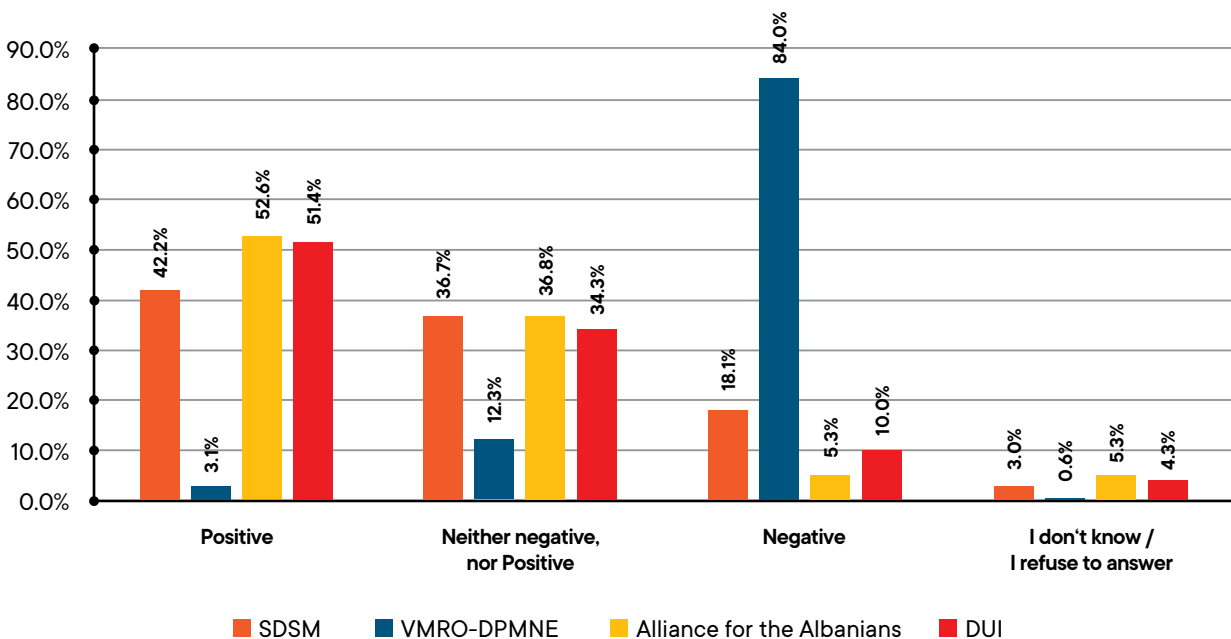
According to the level of education, the support of the agreement is more pronounced among the citizens

with higher education 25.6%, while 20.4% of the citizens with secondary education supported the agreement, i.e. 22.1% of the citizens with primary education.

In terms of age, the greatest support comes from citizens in the 30 to 39 years age group (27.2%), and the citizens from 50 to 59 years least support this agreement with 18.5%.

According to the ethnicity, there are drastically different views on this question as well. Only 14.4% of Macedonians evaluate the agreement positively, while 54% assess the agreement as negative. While among Albanians the picture is completely different. 44.6% of Albanians evaluate this agreement as positive, and only 8.4% evaluate it as negative.

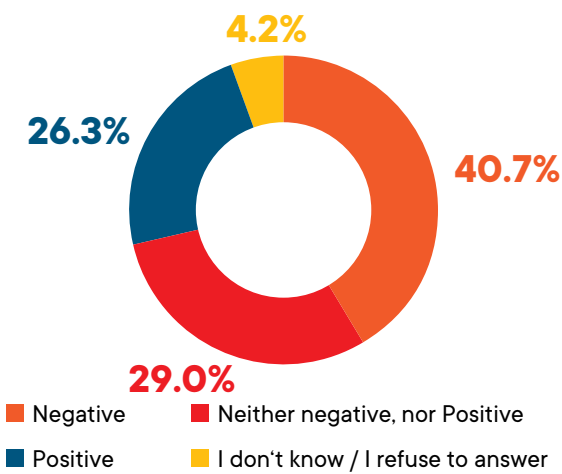
With the party affiliation cross reference, the differences on this question are even more pronounced, especially with the Macedonian bloc of parties. Most of the SDSM supporters (42.2%) positively evaluate this agreement, while only 18.1% view this agreement negatively. The views of the supporters of VMRO DPMNE are completely opposite to the views of the supporters of SDSM. Only 3.1% of VMRO DPMNE supporters evaluate this agreement positively, while 52.6% evaluate it as negative. In the Albanian party bloc, the differences are much smaller. The majority of DUI supporters (51.4%) evaluate the agreements positively, while only 10% evaluate the agreement negatively. The views of AA supporters are similar, with 52.6% of their supporters positively evaluating the agreement, while only 5.3% as negative. Hence, the question that must be asked is "Who is undermining the agreement?"



Graph 31. Image Observatory 2020 - Agreement with Bulgaria, party affiliation

4. Strategic partnership more than good neighboring relations

The fourth question was again asked on a Likert scale from 1 to 5, where 5 means completely positive, and 1 completely negatively evaluates the Prespa Agreement between the Republic of North Macedonia and the Republic of Greece. This agreement was positively (answered with 4 or 5) evaluated by 26% of the respondents, with 3 by 29%, while 41% of the citizens evaluated it with negative values (answered with 1 or 2).



Graph 32. Image Observatory 2020 - Agreement with Greece

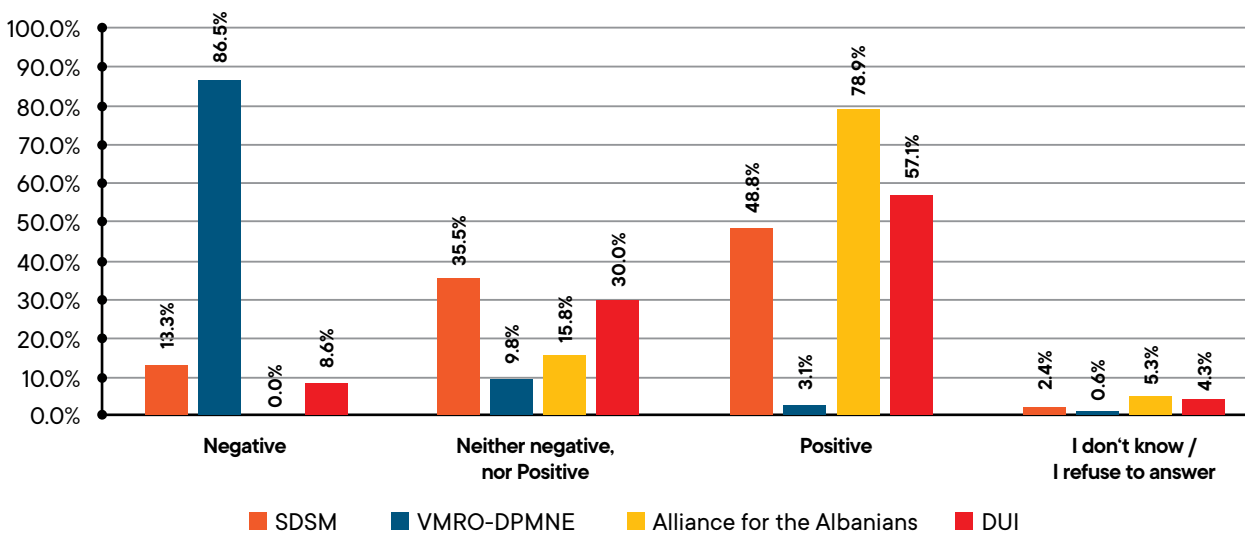
Hence, it follows that the Agreement on Permanent Overcoming of the Name Differences and Strategic Partnership between North Macedonia and Greece has more trust among the citizens than the one on good neighborliness.

In terms of the level of education, the support of the agreement grows in direct proportion to the level of education. Among the respondents with primary education the support is the lowest i.e. 17.7%, among the respondents with secondary education the support is 25.1%, while among the respondents with higher education the support is the highest with 28.7%.

According to age, support is more pronounced among younger respondents. For the respondents from 18 to 29 years the support for this agreement is 29.1%, while for the respondents from 30 to 39 years 30.7%. Older respondents have less support for this agreement. The support for the respondents from 50 to 59 years is 20.5%, while for the respondents from 60 to 69 years the support is 21.3%.

The differences according to ethnicity on this question are great. Only 16.9% of Macedonians evaluate this agreement as positive, while among Albanians the support for this agreement is 51.8%.

There are big differences according to the party affiliation and it is again expressed in the Macedonian bloc. Among SDSM supporters, 48.8% were positive about the agreement, while only 13.3% were negative. The views of the supporters of VMRO DPMNE on this agreement are completely different, only 3.1% evaluate this agreement positively, while a high 86.5% evaluate it negatively. The views of the supporters of the Albanian party bloc are generally positive on this issue. 57.1% of DUI supporters positively assess this agreement, while among AA supporters the support is even higher, i.e. 78.9%.



Graph 33. Image Observatory 2020 - Agreement with Greece, party affiliation

Country Profiles



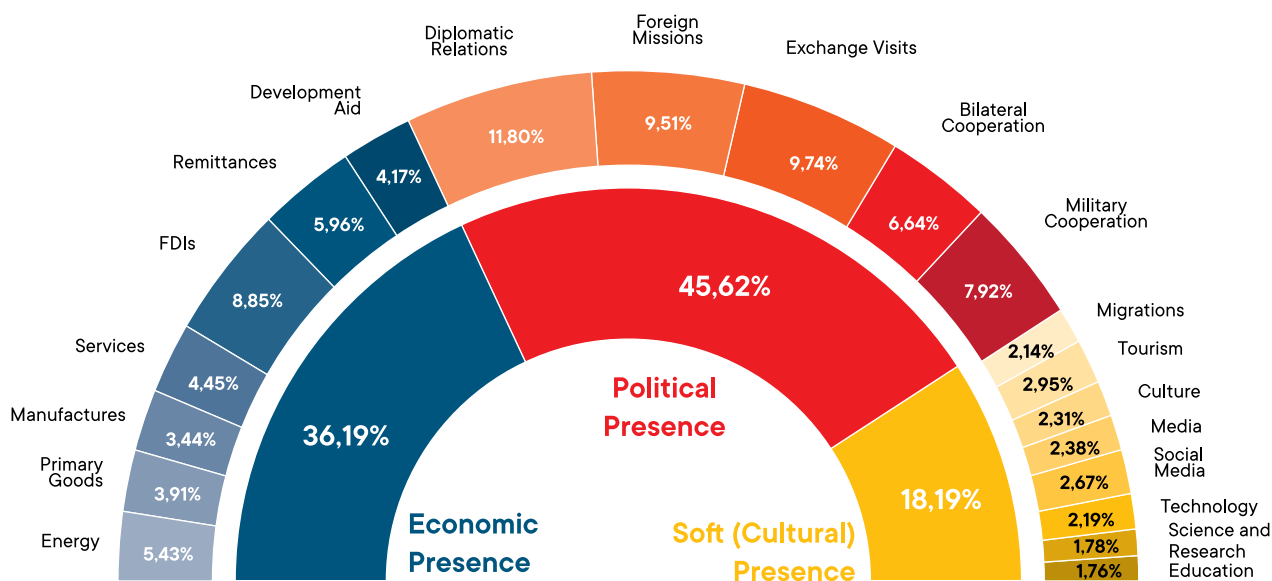
IX. Country Profiles

1. AUSTRIA

Republic of Austria
(Republik Österreich)

Group	EU member states
Population	8.822.267
Capital city	Vienna
International code	(AT)
Date of establishing diplomatic relations	December 23, 1994
Gross Domestic Product (current prices, billions of dollars)	476,81
GDP growth rate (2018)	2,4 %
Rank 2019	13

i. International Impact Index



Graph 34. Overview of the presence of Austria in 2019, by dimensions and variables

Austria has a strong presence in the field of direct investment, which is concentrated in important sectors such as the financial and telecommunications sectors, and is also present in providing aid. First as a donor country for development aid, and then as a country from which originate part of the total remittances to North Macedonia. However, Austria does not boast a high political presence, or a presence in the soft, cultural dimension.

In terms of the political dimension, Austria ranks fourteenth, largely due to its stable diplomatic mission and accredited economic representation. While in terms of cultural or soft presence, this year Austria marks its peak and is in twelfth place, which is a jump of three places compared to 2000

ii. Image Observatory

Austria has a relatively good public image in North Macedonia. As many as 40% of the citizens of North Macedonia assessed Austria's attitude towards the country as positive, friendly, good, or supportive. In contrast, only 8% recognize a negative or hostile attitude.

Vienna, Hofburg, the Schönbrunn Palace, Viennese balls, philharmonic orchestra and classical music are the first association for Austria with a third of our citizens, while almost a fifth of the citizens associate the country with the Alps, winter sports and winter tourism. Only 1% of the citizens see Austria through their investment in North Macedonia, the company EVN.

Interestingly, a small part of our citizens identifies Austria with the current Prime Minister Sebastian Kurz, and there are those for whom the initial association are the famous composers Wolfgang Amadeus Mozart and Johann Strauss.



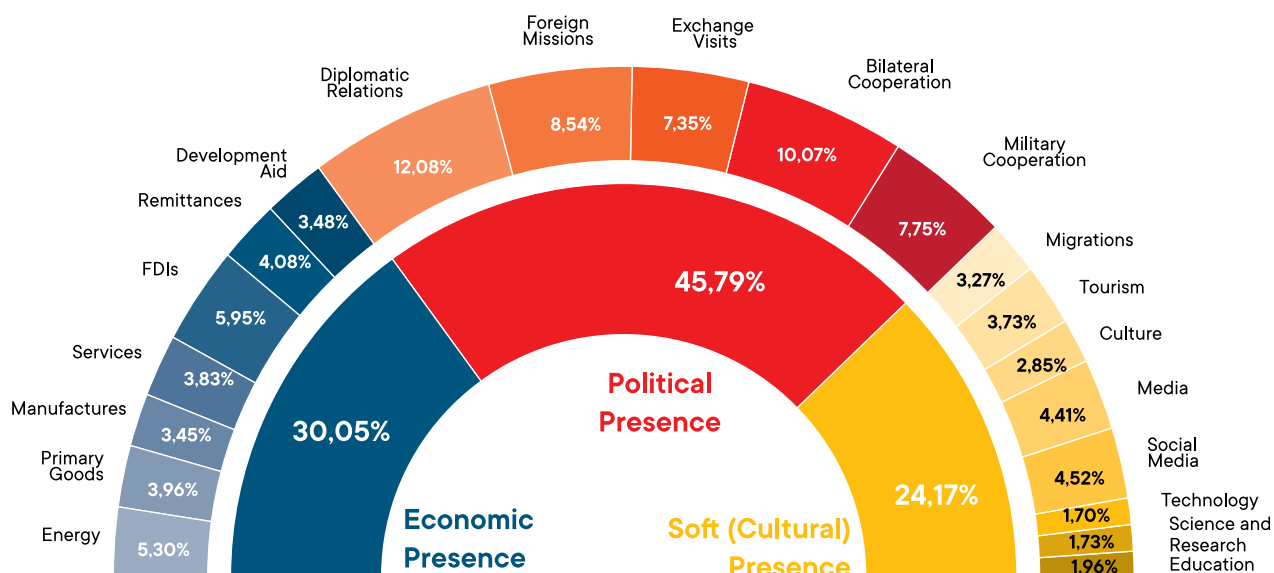
Graph 35. Image Observatory 2020 - Austria

2. ALBANIA

Republic of Albania
(Republika e Shqipërisë)

Group	Western Balkans
Population	2.870.324
Capital city	Tirana
International code	(AL)
Date of establishing diplomatic relations	December 24, 1993
Gross Domestic Product (current prices, billions of dollars)	39,83
GDP growth rate (2018)	4,1 %
Rank 2019	10

i. International Impact Index



Graph 36. Overview of the presence of Albania in 2019, by dimensions and variables

Albania has an extremely low economic presence in North Macedonia, and it is achieved through a small contribution of import of products, i.e. through foreign direct investments. However, it is a neighboring country and for the entire Albanian ethnic community it is the country with which they identify. Hence, as expected, Albania enters the ten highest ranked countries for 2019 in terms of the political dimension. Regarding this dimension, North Macedonia and Albania have extremely intensive bilateral cooperation which is manifested through a total of 78 signed bilateral agreements.

The size of the Albanian ethnic community also determines the size of the cultural presence of Albania. In 2019, it is in eighth place, which is an improvement compared to 2010, although it is not even close to the position that this country had in 2000. It is clear that the presence in the cultural dimension is mainly due to the number of mentions in the media and social media.

ii. Image Observatory

The curse of a neighboring country is reinforced by the fact that there is a large ethnic Albanian community in North Macedonia. The public image of this country is divided. Approximately one-fifth of the country's citizens associate Albania with a hostile or negative attitude that they connect it with the calls and iconography of Greater Albania. However, half of the citizens in Albania see a friend, a neighbor, who has a positive attitude of support and cooperation.

Almost a third of the citizens of North Macedonia identify Albania with tourism, which is followed by good food and alcohol. Prime Minister Edi Rama, for a small part of our citizens, is the first association with Albania. Interestingly, the number of those who recognize Skanderbeg is as twice as high.



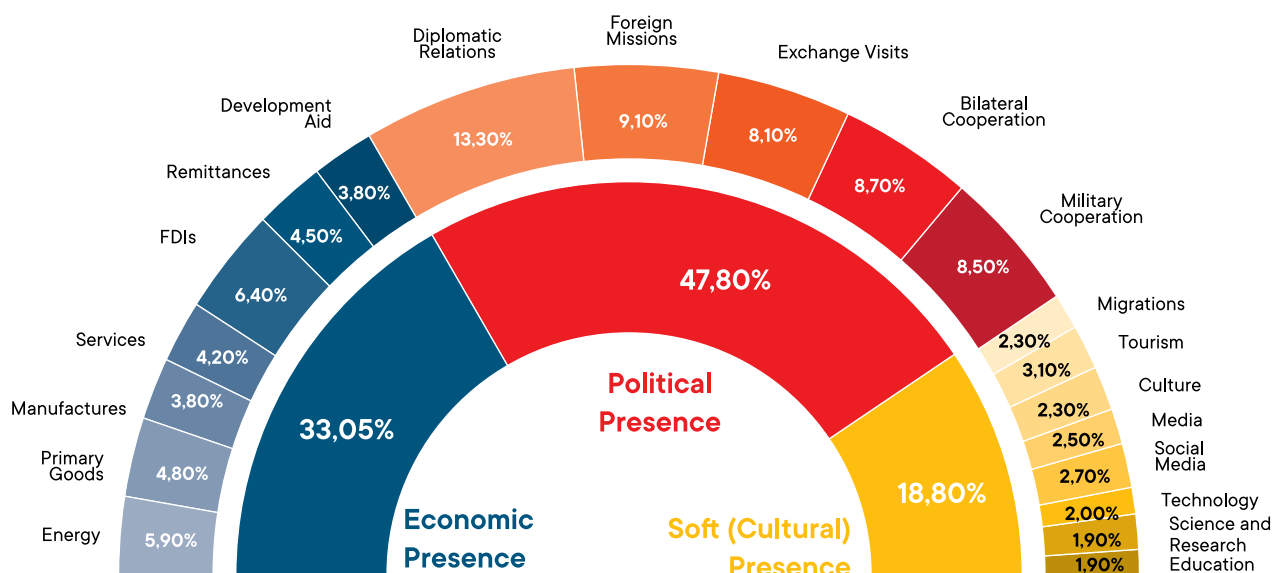
Graph 37. Image Observatory 2020 - Albania

3. BOSNIA AND HERZEGOVINA

Bosnia and Herzegovina
(Bosna i Hercegovina)

Group	Western Balkans
Population	3.509.728
Capital city	Sarajevo
International code	(BA)
Date of establishing diplomatic relations	May 27, 1993
Gross Domestic Product (current prices, billions of dollars)	49,72
GDP growth rate (2018)	3,6 %
Rank 2019	21

i. International Impact Index



Graph 38. Overview of the presence of Bosnia and Herzegovina in 2019, by dimensions and variables

Bosnia and Herzegovina has a very low economic presence in North Macedonia, appearing only through the import of products and direct investments. Although we share a common history, as part of Yugoslavia, we would expect to share more cultural and political ties from there, yet Bosnia and Herzegovina does not have a noticeable presence in either the political or the cultural dimension.

ii. Image Observatory

There is a lot of empathy and emotions when the citizens talk about Bosnia and Herzegovina, especially when they talk about the horrors of the civil war or the ties from the past. Srebrenica, Sutjeska, Mostar, Sarajevo, Bas Bazaar, Tuzla are the main associations for Bosnia and Herzegovina, together with music and great food. For illustration, on third of our citizens recognize B&H by its capital and the food.

Almost two thirds of the our citizens think that Bosnia and Herzegovina is a friend who treats us well, and for many of them the real image of Bosnia and Herzegovina besides the kebab is Mesha Selimovic, Dino Merlin and Kemal Monteno.



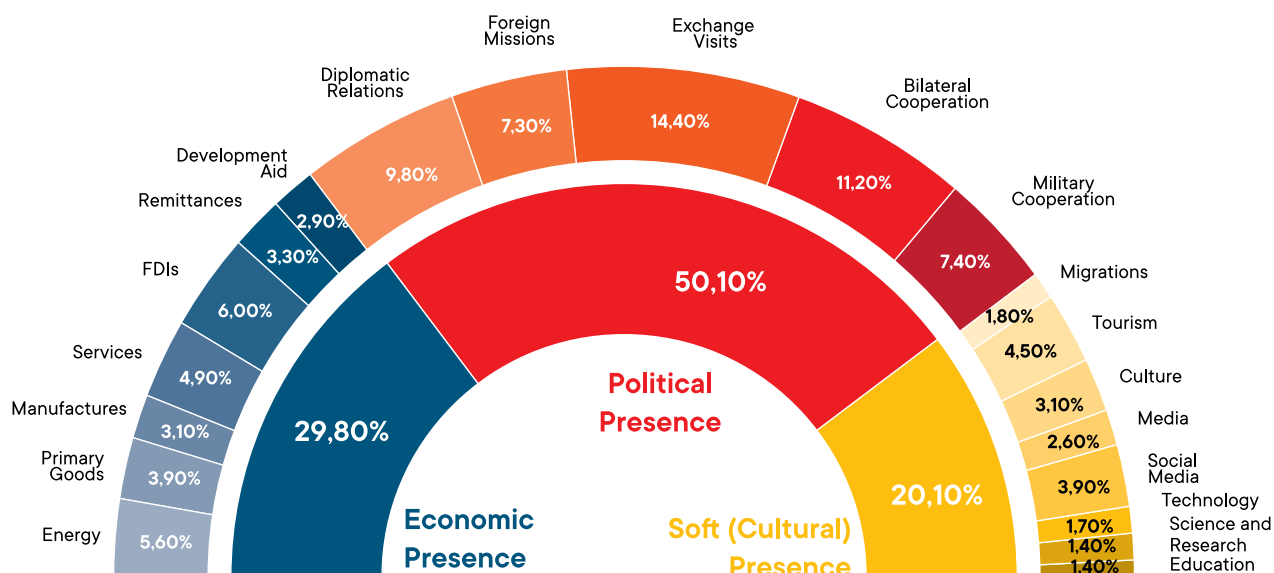
Graph 39. Image Observatory 2020 - Bosnia and Herzegovina

4. BUGARIA

Republic of Bulgaria
(Република България)

Group	EU member states
Population	7.000.039
Capital city	Sofia
International code	(BG)
Date of establishing diplomatic relations	December 31, 1993
Gross Domestic Product (current prices, billions of dollars)	170,92
GDP growth rate (2018)	3,1 %
Rank 2019	3

i. International Impact Index



Graph 40. Overview of the presence of Bulgaria in 2019, by dimensions and variables

Bulgaria has a continuous significant economic presence in North Macedonia, and is visible through the import of products and services, as well as due to the growing contribution to direct investment in our country.

In 2019, Bulgaria is at the top of the list in terms of political presence. This is primarily due to the signed good neighborly agreement from August 1, 2017, as well as the additional 5 bilateral agreements in 2019. Regarding the political presence of Bulgaria, it is important to point out the number of exchange visits and the fact that this is the extreme value in the variable.

As a neighboring country, Bulgaria ranks seventh on the list of cultural presence. Moreover, its presence is extremely pronounced in terms of cultural cooperation, but also in tourism. Bulgaria is the fourth country according to the number of tourists who visited the country in 2019.

ii. Image Observatory

The Image Observatory for 2020 shows that the opinion of the public is extremely divided in relation to neighboring Bulgaria. What is interesting in the poll is that the opinion about Bulgaria is the most divided, so 33% in Bulgaria recognize a friend, collaborator, supporter, neighbor who has a positive attitude towards the country. Equally, ie 33% believe that Bulgaria has a negative, hostile, unjust, hypocritical, blackmailing attitude towards North Macedonia.

If Bulgaria's attitude towards North Macedonia can be easily grouped into two large groups, then the image of the country is extremely fragmented. Although our citizens mainly recognize in Bulgaria a tourist country and a large number of tourist centers, there are those who talk about enemies or occupiers, fraudsters or generally something bad. Probably the best association of the citizens for Bulgaria are the passport, the good neighborly agreement and the Prime Minister Boyko Borisov.



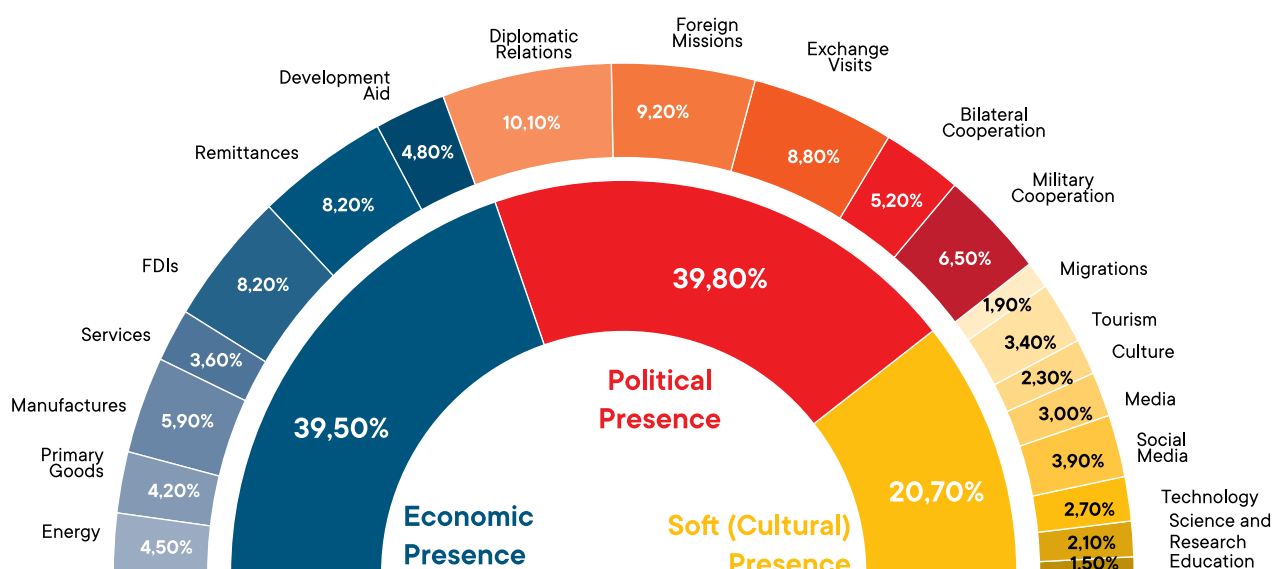
Graph 41. Image Observatory 2020 - Bulgaria

5. GERMANY

Federal Republic of Germany
(Bundesrepublik Deutschland)

Group	EU member states
Population ¹⁴	83.039.099
Capital city	Berlin
International code	(DE)
Date of establishing diplomatic relations	December 16, 1993
Gross Domestic Product (current prices, billions of dollars)	4.443,56
GDP growth rate (2018)	1,5 %
Rank 2019	4

i. International Impact Index



Graph 42. Overview of Germany's presence in 2019, by dimensions and variables

Germany has the strongest economic presence in North Macedonia through all the years of monitoring, and is the most important trading partner and one of the largest direct investors in the country. Germany is also in the top five countries in terms of political presence, as well as sixth in terms of its soft or cultural presence.

Germany owes its political presence mainly to the large and stable diplomatic mission in North Macedonia, as well as to the wide scope of representation in the country. The diplomatic mission, as well as the intensity of the exchange visits, speaks of Germany's strategic interest despite the fact that the country is imperceptible in terms of military cooperation.

In terms of soft presence, Germany is one of the extreme values regarding technology, which speaks of our economic cooperation and consumer habits, as well as in the areas of public discourse in media and social media.

¹⁴ According to the 2011 census.

ii. Image Observatory

There is no doubt that the public considers Germany as a friend. A high 80% of the citizens of North Macedonia consider Germany as a friend, collaborator, partner with a positive attitude towards the country. For some citizens (4%), Germany is a symbol of Europe, and only 3.4% believe that it is hostile to North Macedonia.

Germany's image is the economy. For almost a third of the citizens (32%) Germany is an opportunity for employment and emigration, as well as a good economy. If you ask what reminds them most of Germany, then you will have cars and sports at the top, especially football. Bayern Munich, Bayer Leverkusen, Borussia Dortmund are part of the first association that they make with Germany. There are those who still remember the Second World War and Adolf Hitler, but for our citizens the face of Germany is Chancellor Angela Merkel. One in ten citizens, and many of the surveyed experts as well, associate Germany after the Chancellor, and recognize her as the leader who does the most to protect the interests of her citizens.



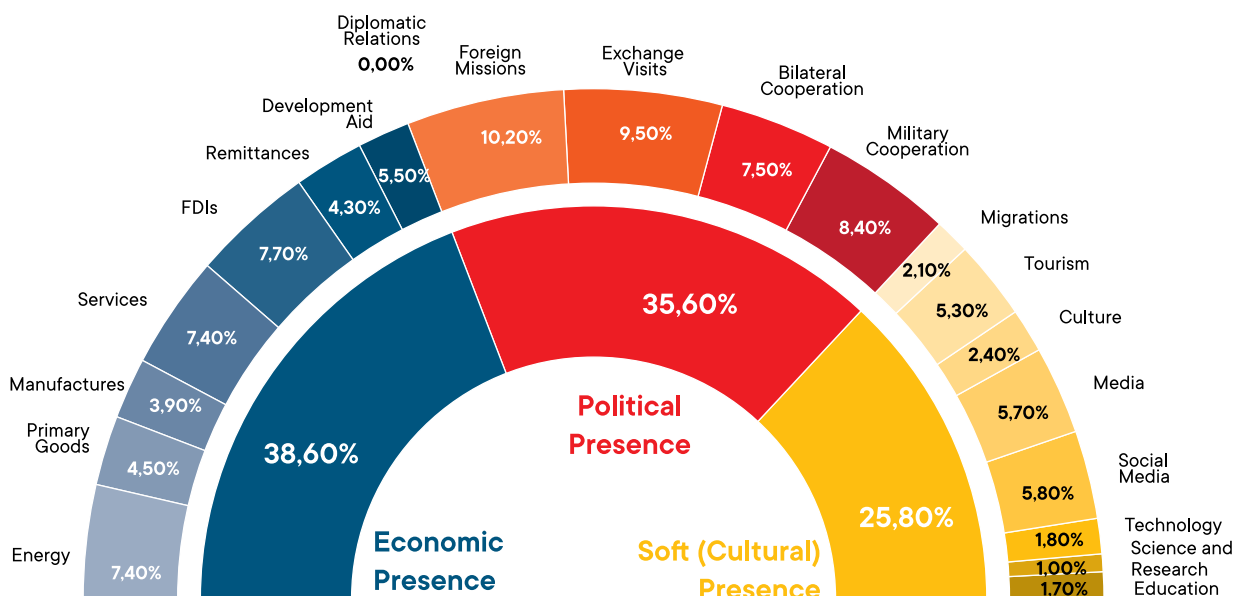
Graph 43. Image Observatory 2020 - Germany

6. GREECE

Republic of Greece
(Ελληνική Δημοκρατία)

Group	EU member states
Population	10.741.165
Capital city	Athens
International code	(GR)
Date of establishing diplomatic relations	May 31, 2019
Gross Domestic Product (current prices, billions of dollars)	323,65
GDP growth rate (2018)	1,9 %
Rank 2019	11

i. International Impact Index



Graph 44. Overview of the presence of Greece in 2019, by dimensions and variables

Greece achieves a continuous significant economic presence in North Macedonia. It is the main importer of oil and derivatives, and has a strong contribution in the import of other products and services. Investments in the period around 2000 continue to maintain a high level of foreign direct investment in the country.

Due to the fact that diplomatic relations between the two countries were established in 2019, Greece is at the bottom on the political presence list. On the other hand, what is lacking in political presence, Greece makes up with soft presence where she is in the top five countries. The main source of soft presence is tourism, but also as an element of public discourse and mention in the media and social networks.

ii. Image Observatory

Greece’s public image is extremely negative. As many as one third of the citizens think that Greece’s attitude towards the country is hostile or negative, is that it is a bad neighbor. If we add to this number the citizens who see this neighboring country through the prism of the name change and the veto of the NATO Summit in Bucharest, then almost half of the citizens have a negative attitude and distrust towards Greece. In contrast, only 28% of the citizens in Greece recognize a positive relationship of a good neighbor and a friend.

Seen through the prism of political affiliation, the division of those who have a negative attitude is enormous. More than half of the citizens who voted negatively for Greece are voters and supporters of VMRO-DPMNE (53.5%), while 20.4% are voters and supporters of SDSM. The rest belong to Levica 13%, Alliance for Albanians 10.6% and DUI 10%. If we analyze the position of those who have a positive attitude towards Greece, then 11.6% are voters of VMRO-DPMNE, 34% are voters of SDSM. Among Albanians, more than a quarter are voters of the Alliance for Albanians, and just over a fifth are DUI voters.

Greece’s image is tourism. Almost half (47%) of our citizens associate this country with the sea, beaches, islands, etc. There are those who build their association with Greece on nationalist rhetoric, but through the Prespa Agreement. Those who enjoy the beautiful written word and antiquity, mostly associate Greece with ancient philosophers, mythology and Homer.



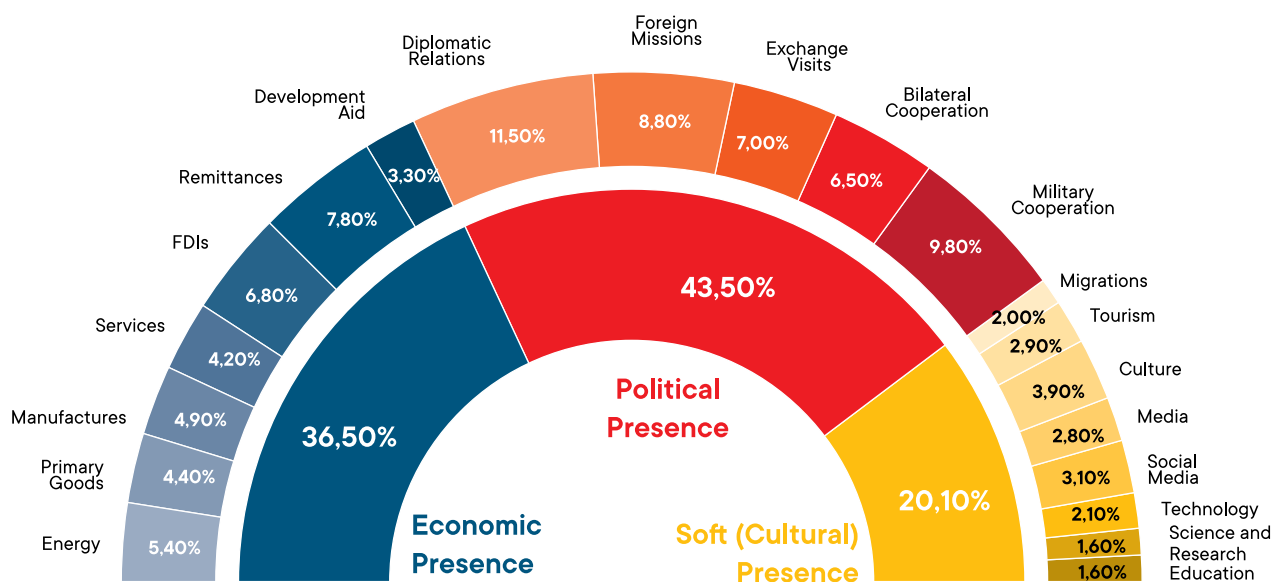
Graph 45. Image Observatory 2020 - Greece

7. ITALY

Republic of Italy
(Repubblica Italiana)

Group	EU member states
Population	60.483.973
Capital city	Rome
International code	(IT)
Date of establishing diplomatic relations	December 16, 1993
Gross Domestic Product (current prices, billions of dollars)	2.454,81
GDP growth rate (2018)	0,8 %
Rank 2019	7

i. International Impact Index



Graph 46. Overview of the presence of Italy in 2019, by dimensions and variables

Italy is the fifth country in terms of economic presence. Thereby, the presence is more significant in the import of manufactures and services, while there is a visible presence in the remittance variable as well. In terms of the political dimension, Italy is in ninth place due to the consistency in each of the variables, as well as the volume of diplomatic representation in the country.

North Macedonia and Italy have an extremely high level of cultural exchange; hence Italy is among the ten highest ranked countries in the soft dimension.

ii Image Observatory

Italy is one of those countries for which citizens of North Macedonia have no dilemma. Almost 60% of the citizens of this country see Italy as a friend and business associate who has a positive attitude towards North Macedonia. Only 2% of respondents answered that Italy has a negative attitude.

Pizza, pasta, prosciutto, parmesan, mozzarella, etc. are the products that create the image of Italy. One fifth of our citizens recognize this country through food. For many of the citizens, sports, cars, style and culture are what they recognize Italy for. Despite the large number of tourist destinations, a lot of the respondents mention various football clubs, but there are some for which Dante Alighieri, Leonardo and Michelangelo are the true image of Italy, as well as Monica Bellucci. Interestingly, from current leaders, the association for Italy is Silvio Berlusconi, as well as the pandemic with COVID-19.



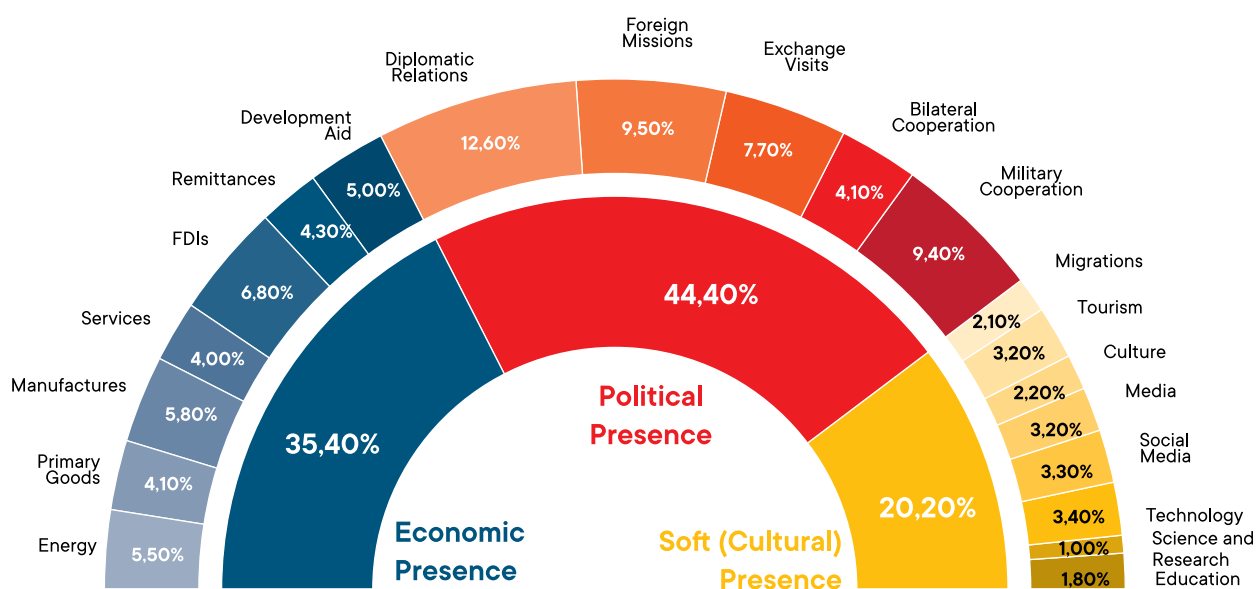
Graph 47. Image Observatory 2020 - Italy

8. CHINA

People's Republic of China
(Zhōnghuá Rénmín Gònghéguó)

Group	global players
Population ¹⁵	1.392.730.000
Capital city	Beijing
International code	(CN)
Date of establishing diplomatic relations	October 12, 1993
Gross Domestic Product (current prices, billions of dollars)	27.306,98
GDP growth rate (2018)	6,6 %
Rank 2019	15

i. International Impact Index



Graph 48. Overview of China's presence in 2019, by dimensions and variables

China is not one of the top ten countries with the largest economic presence in North Macedonia at the moment, but its presence has been continuously increasing over the years in the import of manufactures, foreign direct investments, and partly in development aid. Even within the political dimension, China does not have a large presence, and the high level of presence in the technology variable does not help much to improve its position.

¹⁵ For statistical reasons, the data for the People's Republic of China does not include those for the Hong Kong Special Administrative Region, as well as those for Macau. The data were obtained as an assumption made on the basis of a national survey of population changes conducted on a representative sample.

ii. Image Observatory

Interestingly, 1 in 10 citizens of North Macedonia believes that China donates for the economic and democratic development of the country, and 15% of the citizens associate China with trade, business, investment and cooperation. Seen through the prism of political affiliation, 34% of VMRO-DPMNE voters believe that China is our friend compared to 18% of SDSM voters. While those who see a positive attitude of China towards us are almost equal.

The main image of China is made by the COVID-19 pandemic. As many as 21% of the citizens associate the country with the virus and the disease. There are many who's first association for China are Ali Express, Chinese food and the Great Wall of China, and there are those who associate it with communism, socialism and dictatorship. Interestingly, as a nation that has expressed extreme fear of the introduction of the 5G network, a significant number of citizens mention another Chinese company, Huawei.



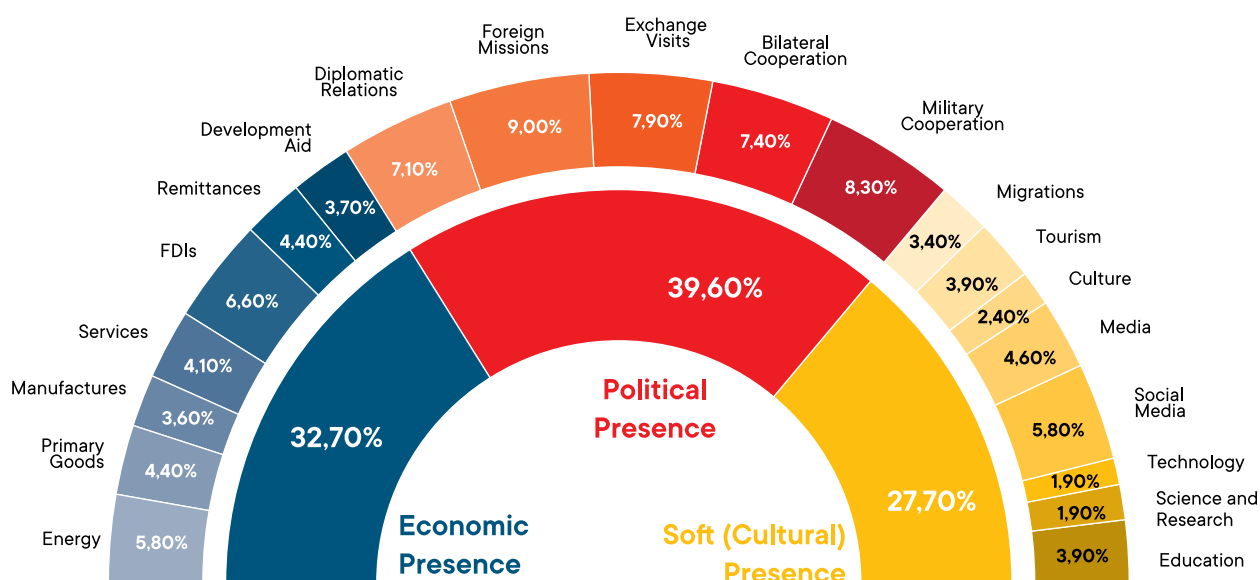
Graph 49. Image Observatory 2020 – China

9. KOSOVO

Republic of Kosovo
(Republika e Kosovës)

Group	Western Balkans
Population ¹⁶	1.810.891
Capital city	Pristina
International code	(XK)
Date of establishing diplomatic relations	October 17, 2009
Gross Domestic Product (current prices, billions of dollars)	22,12
GDP growth rate (2018)	3,8 %
Rank 2019	19

i. International Impact Index



Graph 50. Overview of Kosovo's presence in 2019, by dimensions and variables

Kosovo has a very low economic presence in North Macedonia. It is due to the small import of products and in foreign direct investments. As expected, as a young state, Kosovo has a low cultural and political presence. In terms of the political dimension, Kosovo is ranked 23rd, while in the cultural dimension it is ranked 21st.

ii. Image Observatory

For one third of the citizens, Kosovo is a friendly country that has a positive attitude towards North Macedonia. On the other hand, the same number of citizens recognize an enemy in Kosovo, with a negative attitude, which is mainly due to the fear of nationalist rhetoric about “Greater Albania”. Seen through the prism of political affiliation, there are no citizens who have spoken negatively about Kosovo among the voters of the Albanian bloc of parties. In the Macedonian political parties, the ratio is 3: 1 for the voters of VMRO-DPMNE versus those of SDSM among the citizens with a negative attitude towards Kosovo. If we analyze the group that has a positive opinion, then the ratio is 2: 1 for SDSM voters.

Kosovo’s image is still influenced by the dark and undefined period of the young state before its independence. The main association for Kosovo is crime, according to 12% of our citizens. However, for a large number of the citizens, the association with Kosovo is tourism, food, as well as Bondsteel base, Albin Kurti and Dua Lipa.



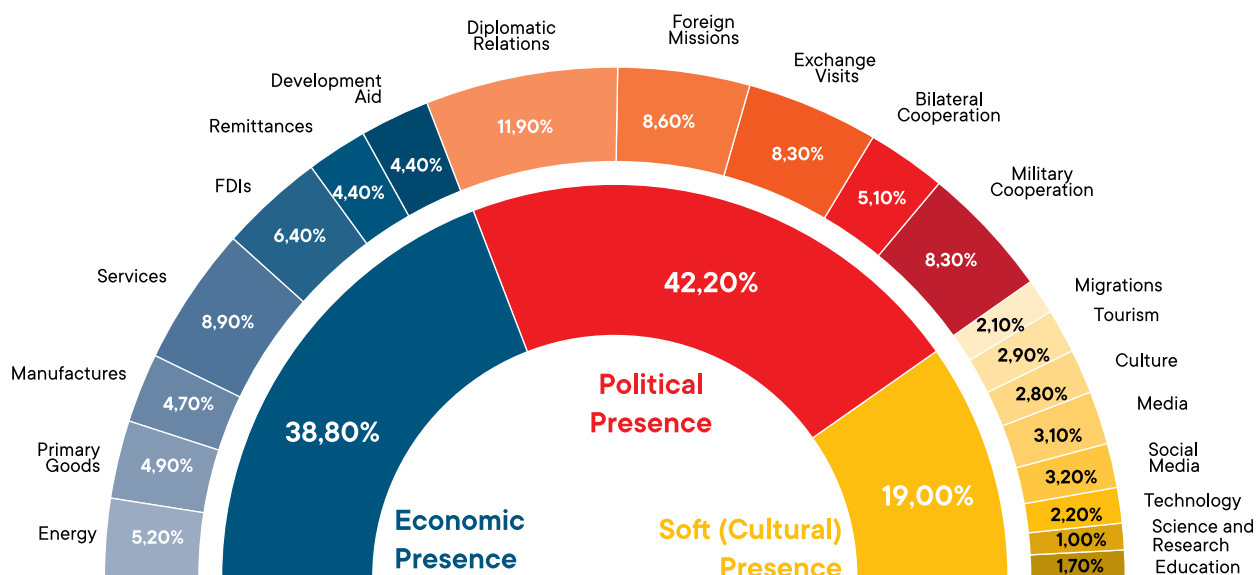
Graph 51. Image Observatory 2020 - Kosovo

10. UNITED KINGDOM

United Kingdom
(United Kingdom of Great Britain and Northern Ireland)

Group	global players
Population ¹⁷	66.273.576
Capital city	London
International code	(GB)
Date of establishing diplomatic relations	December 16, 1993
Gross Domestic Product (current prices, billions of dollars)	3.162,41
GDP growth rate (2018)	1,4 %
Rank 2019	8

i. International Impact Index



Graph 52. Overview of the presence of the United Kingdom in 2019, by dimensions and variables

The United Kingdom ranks fourth in terms of economic presence. It has the highest position of foreign direct investments in North Macedonia. And it also has the largest presence in terms of imports of services, while it lags slightly behind in products. The most common product imported from this country to North Macedonia is platinum, which is a raw material for one of the largest British investments in the country.

In contrast to the economic dimension, in the political and cultural dimensions the presence of the United Kingdom moves at the bottom of the table, in 16th and 15th place, respectively.

¹⁷ The data refer to the usual resident population and exclude the Channel Islands (Guernsey and Jersey) as well as the Isle of Man.

ii. Image Observatory

The qualitative research within the Image Observatory has shown that the United Kingdom is recognized as a country that is influential in the democratic processes in North Macedonia and maintains a high level of involvement. Regardless of the development aid and other aid provided by the United Kingdom, citizens still do not recognize this country as a great friend. To the question “When the United Kingdom is mentioned, what is the first thing that comes to your mind, and describes it’s attitude towards North Macedonia?” one third of the citizens could not make any association. For just over a quarter of the citizens (28%), the United Kingdom has a good, friendly relationship of economic and political cooperation and support, as well as a business partner relationship. On the other hand, only 10% of the citizens perceive the United Kingdom negatively.

The Big Ben, River Thames, Shakespeare, The Beatles, David Beckham, Robbie Williams are all part of the associations for the United Kingdom. However, the portrait of the queen is a graphic symbol for many things related to the state, and according to the Image Observatory, Queen Elizabeth II is the main image of this state in almost one third (31%) of the citizens. The ladies are the main characters for the United Kingdom. Besides the Queen, other members of the royal family like Princess Diana and Princess Catherine can be found on the list, and interestingly, the main association for political leaders in the United Kingdom is the former Prime Minister Margaret Thatcher.



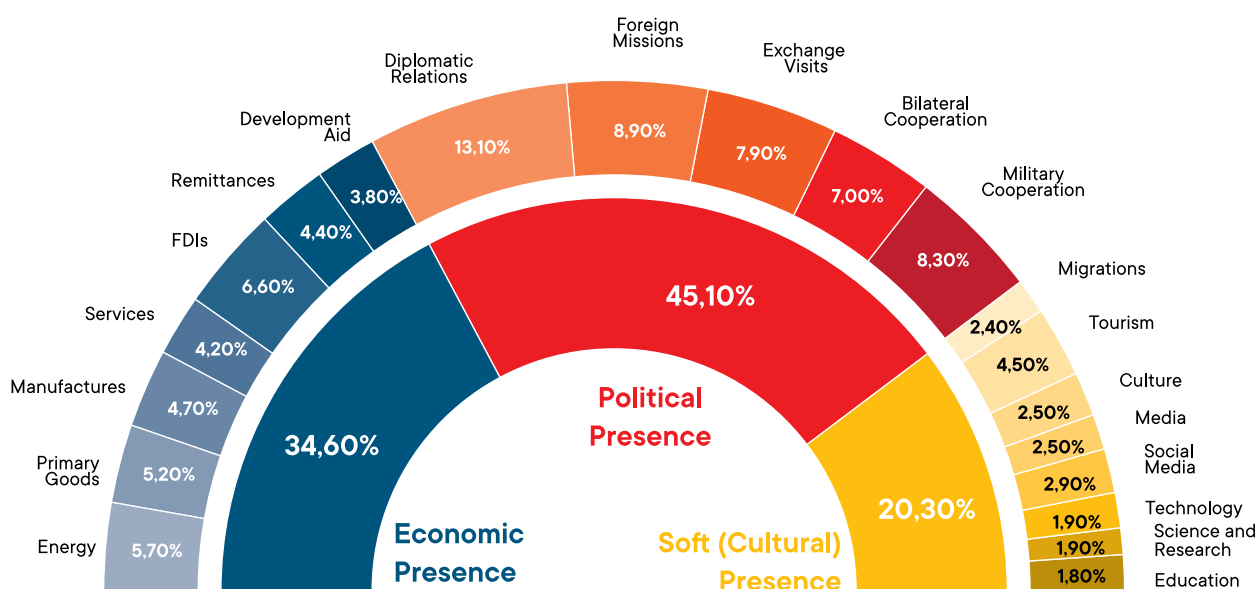
Graph 53. Image Observatory 2020 - United Kingdom

11. POLAND

Republic of Poland
(Rzeczpospolita Polska)

Group	EU member states
Population ¹⁸	38.406.000
Capital city	Warsaw
International code	(PL)
Date of establishing diplomatic relations	December 30, 1993
Gross Domestic Product (current prices, billions of dollars)	1.287,28
GDP growth rate (2018)	5,1%
Rank 2019	20

i. International Impact Index



Graph 54. Overview of Poland's presence in 2019, by dimensions and variables

Poland has a moderate economic presence in North Macedonia, mainly through imports of products and services and foreign direct investments. The trend of increasing Poland's presence is noticeable, especially through the foreign direct investments. In terms of the political dimension, Poland has no visible presence and is in the 18th place, while in the cultural dimension it is in the 16th place.

¹⁸ The data refer to the usual resident population.

ii. Image Observatory

The weak presence of Poland is shown by the fact that 40% of the citizens do not have an attitude towards Poland. Thereby, 30% of the citizens of North Macedonia see Poland as a friend, which has an excellent relationship with North Macedonia, while only 3% believe that Poland is not our friend.

Even when it comes to the image of the state, citizens of North Macedonia have no attitude. As many as 42% refused to answer or did not know what to point out. Those who did point, however, speak through the emotions of the terror of World War II, the Holocaust and Auschwitz concentration camp.



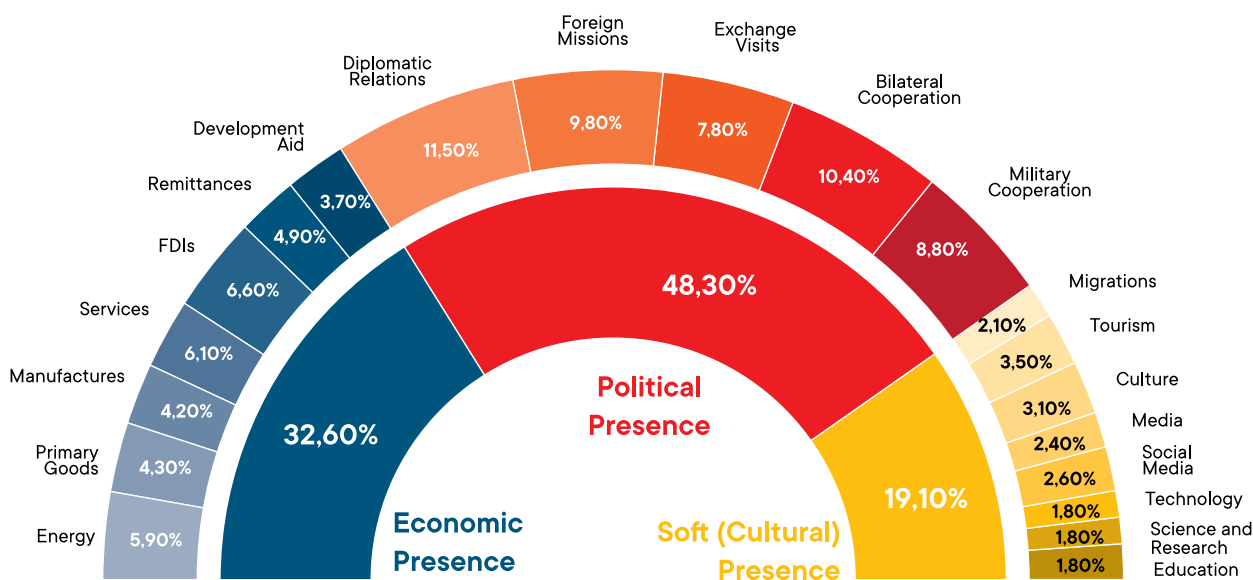
Graph 55. Image Observatory 2020 - Poland

12. ROMANIA

Romania
(România)

Group	EU member states
Population	22.170.586
Capital city	Bucharest
International code	(RO)
Date of establishing diplomatic relations	January 11, 1995
Gross Domestic Product (current prices, billions of dollars)	549,20
GDP growth rate (2018)	4,0 %
Rank 2019	16

i. International Impact Index



Graph 56. Overview of Romania's presence in 2019, by dimensions and variables

Romania has a low economic presence in North Macedonia, with a small contribution through the import of products. On the other hand, ranks 11th in political presence. While in the cultural dimension it is on the 18th place. Interestingly, Romania has a remarkable bilateral cooperation compared to other variables in the political presence, and has a large contingent of tourists.

ii. Image Observatory

The Image Observatory for Romania shows a similar result as for Poland. A high 42% of respondents do not have an opinion on Romania's attitude towards North Macedonia, while only 13% view it neutrally. Slightly more than a third of the citizens of North Macedonia, or 36%, in Romania see a friend and associate who has a positive attitude.

Count Dracula is the main association for Romania for most of our citizens. Stereotypes are strongly expressed here as well, so for some respondents the association for Romania are Roma people and poverty, while for 6% of the population the main associations for Romania are former leader Nicolae Ceausescu and the Aromanian ethnic community.



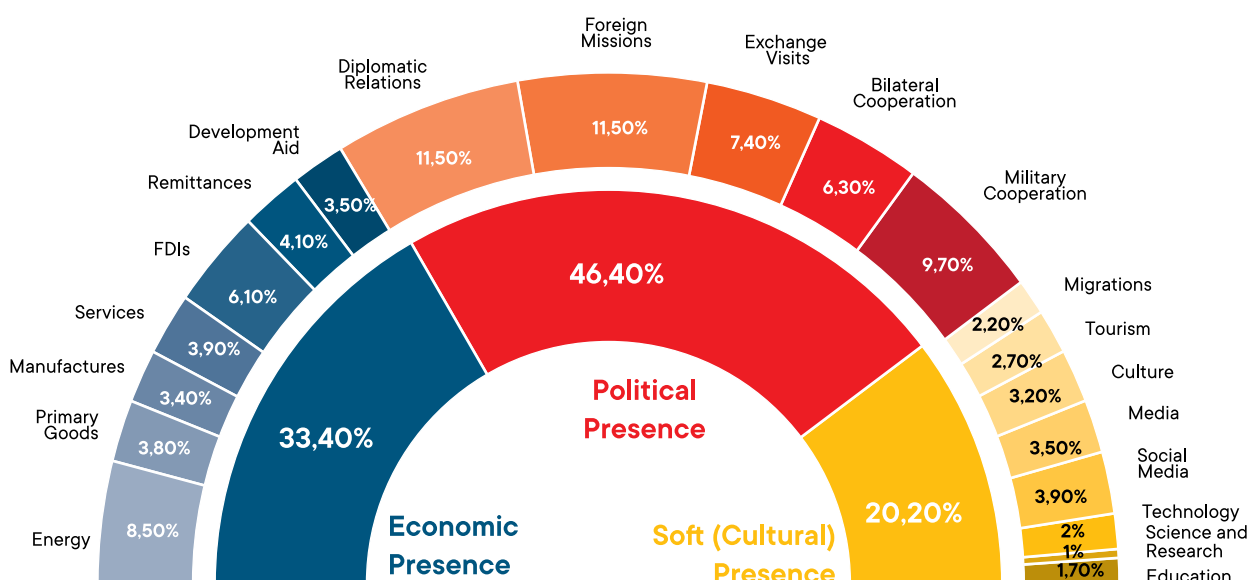
Graph 57. Image Observatory 2020 - Romania

13. RUSSIA

Russian Federation
(Российская Федерация)

Group	global players
Population ¹⁹	144.526.636
Capital city	Moscow
International code	(RU)
Date of establishing diplomatic relations	January 31, 1994
Gross Domestic Product (current prices, billions of dollars)	4.389,96
GDP growth rate (2018)	2,3 %
Rank 2019	12

i. International Impact Index



Graph 58. Overview of Russia's presence in 2019, by dimensions and variables

Russia does not have a significant presence in the country through foreign direct investment, remittances or development aid. The strongest economic presence is expressed through the import of gas.

Russia's political presence has grown over the years. In 2000, Russia was ranked 16th. In 2010, on the eleventh, and in 2019 on the seventh place. The strong political presence is based on a large diplomatic mission branched out through a cultural center, economic mission and honorary consulates. Unlike the political, the Russian cultural presence is weakening. Namely, Russia in 2000 is on the seventh place and in 2019 drops down to the twelfth place in terms of cultural presence, and it is most visible in the cultural exchange and cooperation.

¹⁹ Projection of the State Statistical Office of the Russian Federation in 2018.

ii. Image Observatory

Half of the population of North Macedonia think that Russia's attitude towards the country is good, i.e. 22% (friendly), 19% (good), 9% (positive). On the other hand, only 8% think that Russia has a negative or hostile attitude towards the country.

Russia's image is made by the military, or the memory of the Red Army and the successes of World War II. Hence, the main association for this country with the citizens is President Vladimir Putin, for whom many add adjectives such as, Orthodox, leader, powerful, military boot, etc. In this form of associations for our citizens, the image of Russia is made by the oligarchs, and it is interesting to mention the domestic one, Samsonenko. The cold and the winter nights are the next association, as is Moscow. While in third place is alcohol and especially vodka. The romance of the Russian language and culture highlights famous Russian authors, especially Tolstoy and the character of Anna Karenina.



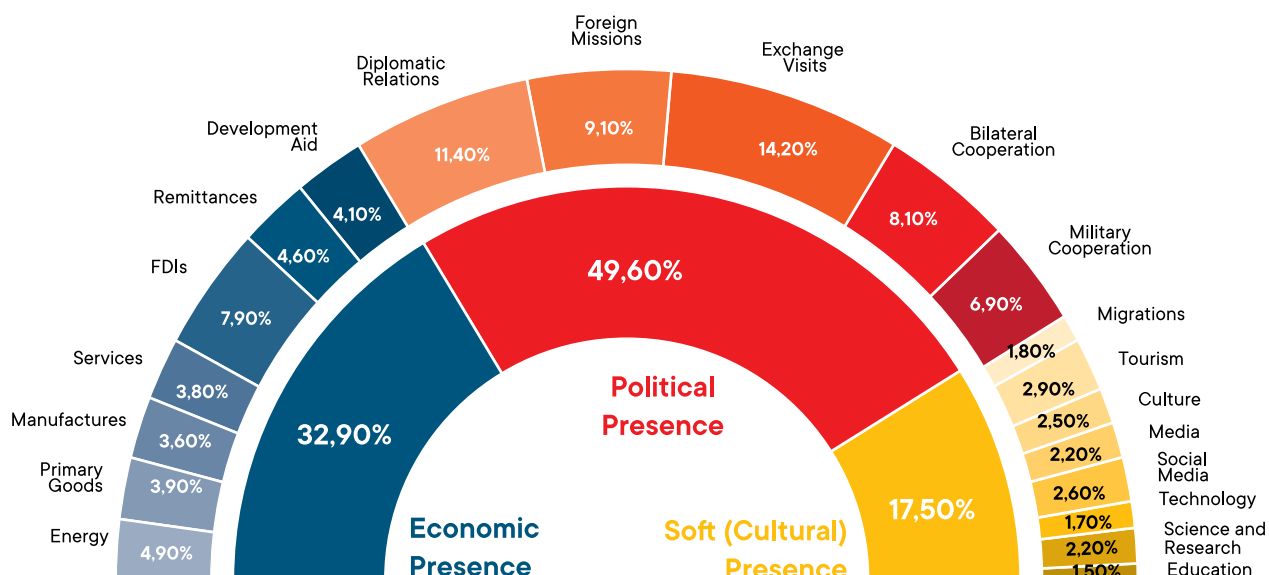
Graph 59. Image Observatory 2020 - Russia

14. SLOVENIA

Republic of Slovenia
(Republika Slovenija)

Group	EU member states
Population	2.066.880
Capital city	Ljubljana
International code	(SI)
Date of establishing diplomatic relations	March 17, 1992
Gross Domestic Product (current prices, billions of dollars)	79,17
GDP growth rate (2018)	4,1%
Rank 2019	6

i. International Impact Index



Graph 60. Overview of the presence of Slovenia in 2019, by dimensions and variables

Slovenia has a continuous significant economic presence in North Macedonia due to the import of products and services, strong foreign direct investments in our country and the development aid.

Strong diplomatic ties expressed by an intensive agenda of exchange visits is what makes Slovenia have an extremely strong political presence, third place in 2019. In terms of the cultural dimension, Slovenia ranks 13th, which weakens the overall presence. The highest variable in this dimension is science and research which is due to the traditional ties from the past of the former common state.

ii. Image Observatory

In the public, Slovenia is considered a great friend of the state. The pronounced and intense political ties and support that Slovenia gives to North Macedonia in NATO and the EU are expected to lead to the fact that 63% of respondents think that the relationship between the two countries is friendly, positive, kind and cohesive. In contrast, only 2% of the citizens of North Macedonia believe that Slovenia has a negative or cold attitude towards us.

Ljubljana, Bled, Triglav, the Slovenian Alps, greenery and pure nature are the main associations for Slovenia with our citizens.



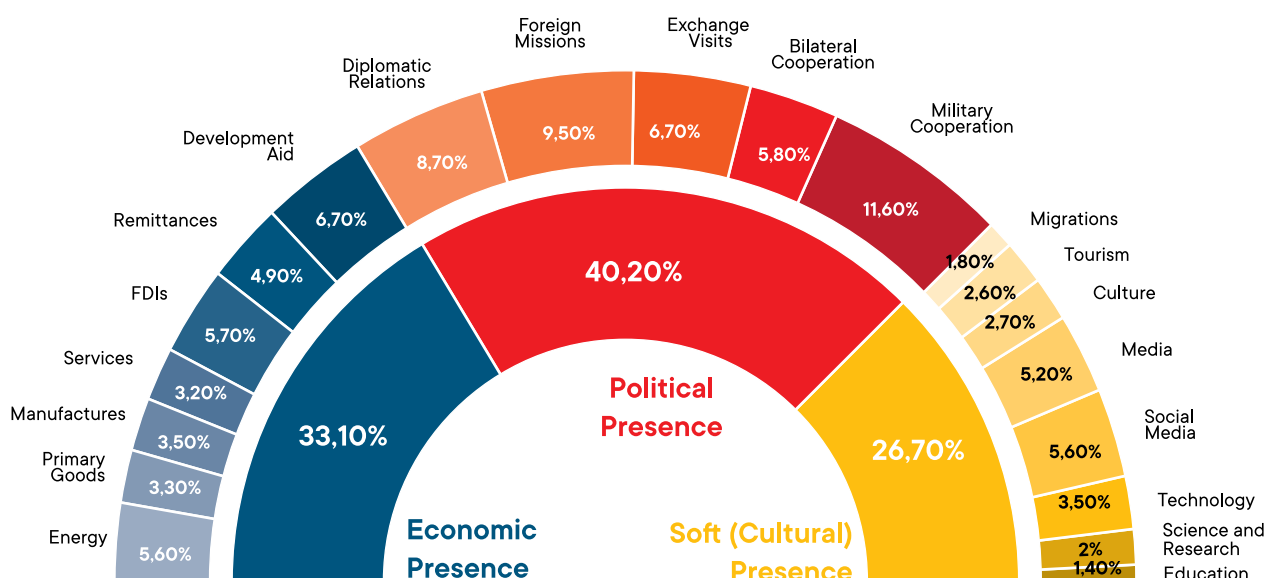
Graph 61. Image Observatory 2020 - Slovenia

15. UNITED STATES OF AMERICA

United States of America
(United States of America)

Group	global players
Population ²⁰	327.167.434
Capital city	Washington
International code	(US)
Date of establishing diplomatic relations	September 13, 1995
Gross Domestic Product (current prices, billions of dollars)	21.427,67
GDP growth rate (2018)	2,9 %
Rank 2019	2

i. International Impact Index



Graph 62. Overview of the presence of USA in 2019, by dimensions and variables

USA is in the high second place in terms of economic presence. In doing so, the United States continuously provides high amounts of development aid to our country, and is a source of energy imports, primarily oil. Due to the significant number of emigrants in this country, USA is one of the significant senders of remittances.

Although USA ranks in the fourth place in the political presence dimension, the index ranking must not be an occasion for underestimation of the state. The United States has the largest diplomatic mission in North Macedonia. In fact, it is twice the size of the next one on the list, the one from the Russian Federation. The USA has provided the largest amount of aid in equipment and armaments. In the cultural dimension, the United States has amplified its presence over the years.

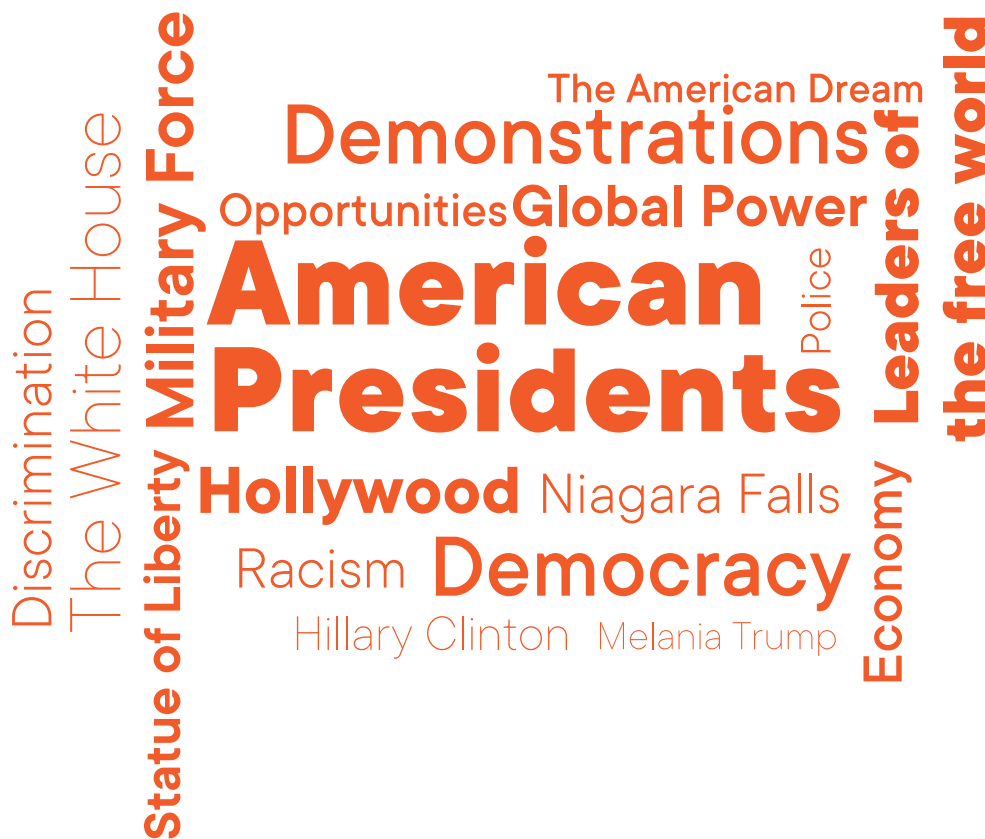
²⁰ The total population is assumed according to the data of the already conducted census of the population. The assumption excludes US troops stationed abroad, as well as civilians residing outside the United States..

ii. Image Observatory

According to the Image Observatory, only 5% of respondents believe that the attitude of the USA towards North Macedonia is negative. On the contrary, a huge share of the population shows a different level of positive or cooperation attitudes. For almost a third of the citizens, or 28%, the relationship between the two countries are positive, while for 13% of the citizens USA is a friend. Only 12% of the respondents said that the relationship is one of cooperation and support, and with small percentages there are political interests, NATO membership, economy. Interestingly, the analysis through the prism of political affiliation shows that the supporters of Levica, are the ones who consider the USA to be a friend of North Macedonia, with a high 45.5%, while those of VMRO-DPMNE are the smallest with only 9.2%.

The percentages of those who consider that the relationship with the United States of America is one of cooperation and support are moving in the same direction. Moreover, SDSM supporters are on the rise (22.9%), followed by Levica with 18.2%, while VMRO-DPMNE is at the bottom. This party is the only one whose supporters see the United States as an enemy.

Democracy, demonstrations, the Statue of Liberty are some of the associations for the United States of America, which speaks to the character and recognizability of the character of the state. Military power, the White House and the fact that the United States is a global power are also recognizable to the citizens of North Macedonia. Interestingly, the popular culture in the United States, on the list of associations for our citizens, is represented by American leaders, primarily the presidents, but also the former Secretary of State and candidate for President of the United States in 2016, Hillary Clinton and the current First Lady of the United States, Melania Trump.



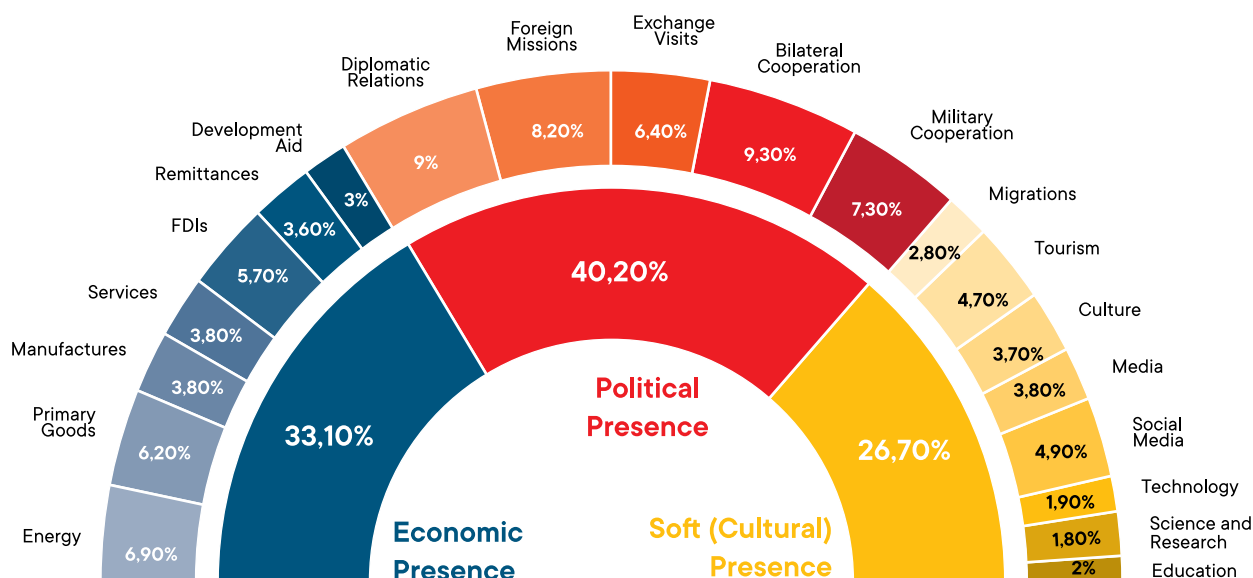
Graph 63. Image Observatory 2020 - USA

16. SERBIA

Republic of Serbia
(Republika Srbija)

Group	Western Balkans
Population	7.001.444
Capital city	Belgrade
International code	(RS)
Date of establishing diplomatic relations	April 8, 1996
Gross Domestic Product (current prices, billions of dollars)	130,22
GDP growth rate (2018)	4,4 %
Rank 2019	5

i. Индекс на меѓународно присуство



Graph 64. Overview of the presence of Serbia in 2019, by dimensions and variables

Serbia is achieving a continuous significant economic presence in North Macedonia. This country mainly imports electricity, agricultural products and food, and has a modest but growing contribution to foreign direct investment.

In terms of the political dimension, Serbia is in 8th place where is met by three of the countries in the region, Slovenia, Croatia and Bulgaria, three global players, the United States, Russia and Turkey and Germany. The cultural exchange and the high level of educational and scientific cooperation with this country, bring Serbia to the high second place in the soft presence. However, after being at the top for several years, this is a decline that Serbia is recording in 2019.

ii. Image Observatory

The Image Observatory shows that Serbia is the most positively assessed country in 2019. Obviously, the ties and close relations with Serbia are still lasting, and the citizens see a friend in them. Three-quarters of the citizens of North Macedonia in Serbia see a friend, neighbor, associate or trade partner. Only 3% of the citizens evaluate the attitude as negative, while 2% recognize hypocrisy in it.

Serbia's image is made up of music, food, politics and sports and several obvious battles. First, the battle between the former Yugoslav music scene and the current turbo-folk, which can be seen in the fact that most of our citizens associate this country through the Guca festival and the singers Lepa Brena, Ceca and Jelena Karleusa. The second battle is more internal for the citizens when they talk about neighboring Serbia. Many remember the NATO military intervention with emotion, as they talk about former Serbian President Slobodan Milosevic and his role as a war criminal. Leskovac grill or roast pork is the third and last battle when it comes to the image of Serbia.

When we talk about sports, then there are no dilemmas, Novak Djokovic is inviolable.



Graph 65. Image Observatory 2020 - Serbia

17. TURKEY

Republic of Turkey
(Türkiye Cumhuriyeti)

Group	global players
Population	82.377.000
Capital city	Ankara
International code	(TR)
Date of establishing diplomatic relations	August 26, 1992
Gross Domestic Product (current prices, billions of dollars)	2.361,77
GDP growth rate (2018)	2,8 %
Rank 2019	1

i. International Impact Index



Graph 66. Overview of the presence of Turkey in 2019, by dimensions and variables

Turkey ranks third in terms of economic presence. An important part of primary goods and manufactures are imported from this country to North Macedonia, and there is a strong and growing presence in the field of foreign direct investments in the country. Interestingly, Turkey also provides development aid.

Second on the list of the political presence, Turkey has developed cooperation with North Macedonia in every way, and many of the values in this dimension are extreme. Turkey has a significant cultural presence in the country, ranks third in 2019. This is not a result of watching series of Turkish production, but the contingent of tourists coming from Turkey, students studying at universities in North Macedonia and citizens of Turkey that have regulated stay in North Macedonia.

ii. Image Observatory

Turkey, with its centuries-old presence in the Balkans, has left an exceptional cultural stamp.

Three quarters of our citizens think that Turkey is the country that is our friend, trade partner, donor, associate investor who treats us well. Interestingly, the number of those who see an enemy in Turkey is almost imperceptible, 0.1% of the citizens. Interestingly, when this is seen through the prism of political affiliation, then 42.9% of VMRO-DPMNE supporters see a friend in Turkey, much less are those who see her as a collaborator. The extreme values in terms of the perception of friendship are made by the supporters of Levica, as much as 82%, i.e. those of DUI, with only 18.6%.

Turkey is touted by tourism and food. As many as 31% of the citizens see this country through these two sectors. The next association for Turkey is the series of their production, and in third place is politics where, despite the historical ties, the current Turkish President Recep Tayyip Erdogan is closer to the citizens than the founder of modern Turkey, Mustafa Kemal Ataturk.



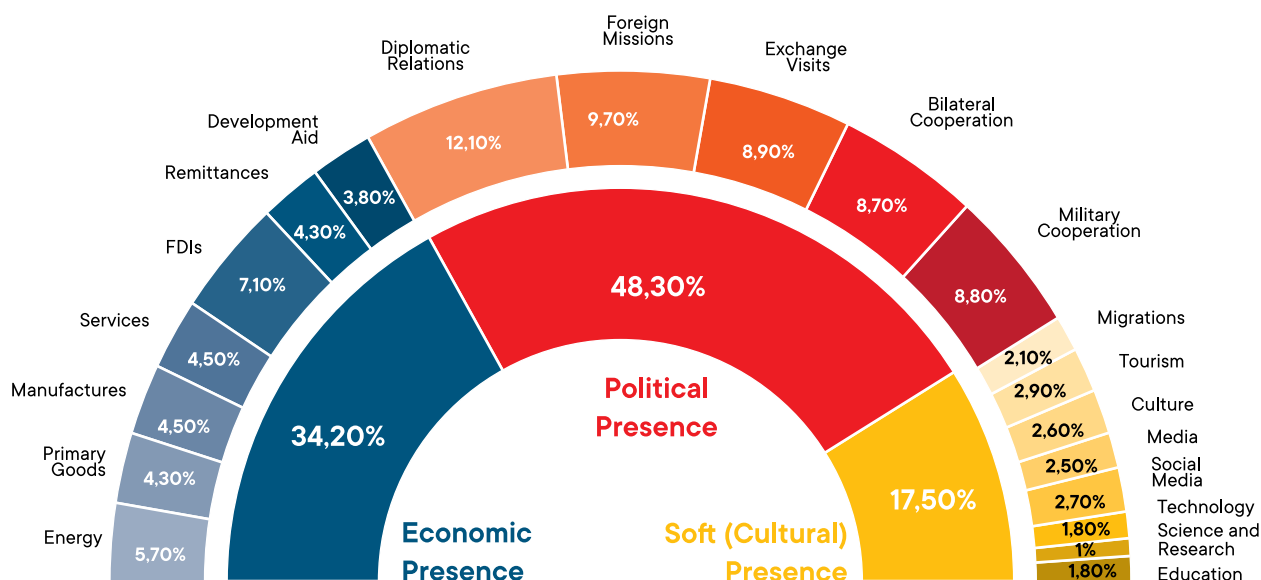
Graph 67. Image Observatory 2020 - Turkey

18. HUNGARY

Hungary
(Magyarország)

Group	EU member states
Population	9.772.756
Capital city	Budapest
International code	(HU)
Date of establishing diplomatic relations	August 29, 1994
Gross Domestic Product (current prices, billions of dollars)	335,75
GDP growth rate (2018)	5,1%
Rank 2019	17

i. International Impact Index



Graph 68. Overview of the presence of Hungary in 2019, by dimensions and variables

Hungary has a moderate economic presence in North Macedonia. The presence is mainly down to the import of products and services and foreign direct investments. Meanwhile, the situation of foreign direct investments decreases in 2019 compared to 2010.

Hungary is in the middle of the index with its political presence, and is at the very bottom of the cultural presence for 2019.

ii. Image Observatory

The perceptions and attitudes of the citizens of North Macedonia towards Hungary are generally neutral. As many as 41% of the respondents do not know or do not want to answer the question what attitude Hungary has towards North Macedonia, while an additional 8% consider the attitude of Hungary to be neutral.

Even the image of Hungary is subject to this neutrality of the citizens. As many as 44% have no association for this country. From those who have an opinion, the image of Hungary makes the capital Budapest, in second place as the most mentioned term is “Gruevski”, and a little below is the current Hungarian Prime Minister Viktor Orban. All this clearly shows the association that our citizens have with Hungary.



Graph 69. Image Observatory 2020 - Hungary

19. FRANCE

Republic of France
(République française)

Group	EU member states
Population	64.812.052
Capital city	Paris
International code	(FR)
Date of establishing diplomatic relations	December 16, 1993
Gross Domestic Product (current prices, billions of dollars)	3.061,81
GDP growth rate (2018)	1,7 %
Rank 2019	14

i. International Impact Index



Graph 70. Overview of the presence of France in 2019, by dimensions and variables

France has a low economic presence in North Macedonia. It is through a small contribution in the import of products and services, as well as foreign direct investments, and the state of the foreign direct investments tends to decrease.

In addition to the current feelings of the citizens for France, they have a serious political and cultural presence in North Macedonia due to the developed diplomatic mission and is in the thirteenth place for political presence. In the cultural dimension, France ranks 11th.

ii. Image Observatory

After the veto in 2019 for the start of EU accession negotiations, our citizens have a generally negative feeling about France. One fifth of the citizens, i.e. 21% think that France's attitude towards North Macedonia is negative. Moreover, as many as 30% of the supporters of VMRO-DPMNE are in this position, and 23% of SDSM supporters share this opinion. The supporters of VMRO-DPMNE are more numerous than those of SDSM and when analyzing the citizens who think that France has a positive attitude towards the country, although the difference there is in the margin of error.

When talking about France's image, one third of the citizens associate France with tourism. If we add to this figure those citizens who single out the French capital, then the figure will exceed 50%. Style, perfumes, cosmetics, fashion, romance complete the list of associations for France. Among them, a place must be found for the emotions of our citizens prompted by the French veto, probably that is why the current president Emmanuel Macron has surpassed the eternal Napoleon on the list.



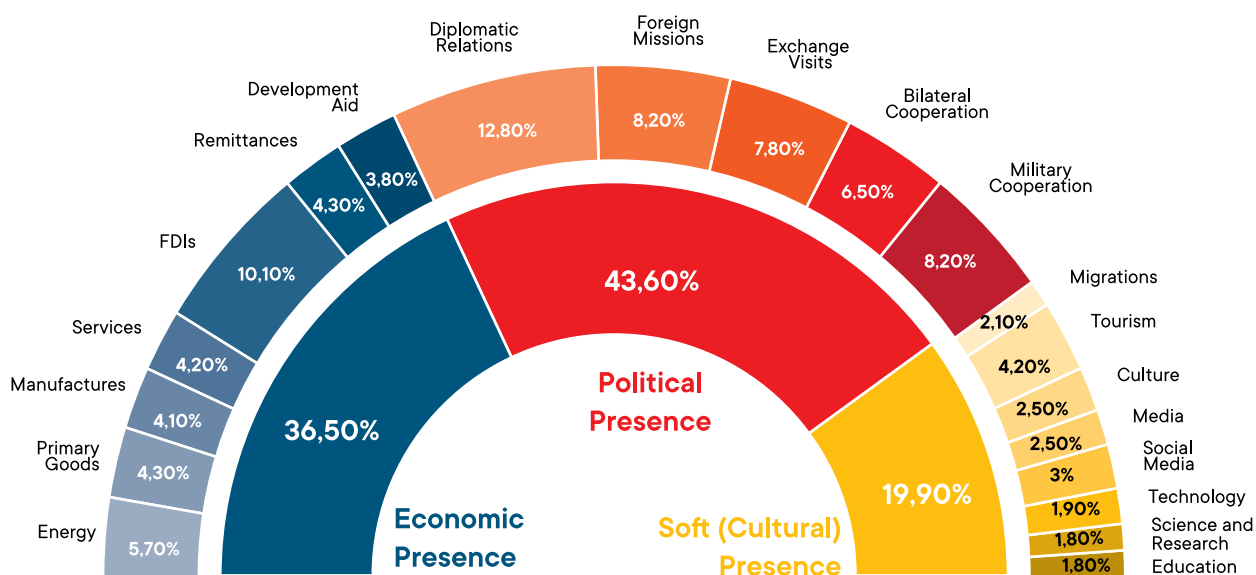
Graph 71. Image Observatory 2020 - France

20. NETHERLANDS

Kingdom of the Netherlands
(Koninkrijk der Nederlanden)

Group	EU member states
Population	17.327.933
Capital city	Amsterdam
Capital city	(NL)
Date of establishing diplomatic relations	December 16, 1993
Gross Domestic Product (current prices, billions of dollars)	1.005,33
GDP growth rate (2018)	2,6 %
Rank 2019	18

i. International Impact Index



Graph 72. Overview of the presence of the Netherlands in 2019, by dimensions and variables

The Netherlands has a significant presence in the economic dimension due to foreign direct investment, and achieves a modest presence through the import of products and services. Regarding the other two dimensions, the Netherlands has a standard presence, as well as in the general ranking. In terms of political dimension, this country is on the 18th place, while in the cultural dimension it is on the 19th place.

ii. Image Observatory

The Netherlands is a longtime friend of the country and provides huge development aid, therefore, as expected, 43% of the citizens believe that the relationship is good and friendly, a positive relationship of cooperation and assistance. Only 3% see the relationship with the Netherlands through the prism of tourism, while the same number think that the Netherlands is not our friend.

Tulips are the main image of the Netherlands for the citizens of North Macedonia. As many as a third associate the state with this flower. Next on the list is marijuana. The image of the Netherlands is complemented by bicycles and windmills, while for some of our citizens the principled attitude regarding the fundamental rights and especially the rights of the LGBTI community is enough for a direct association with the state.



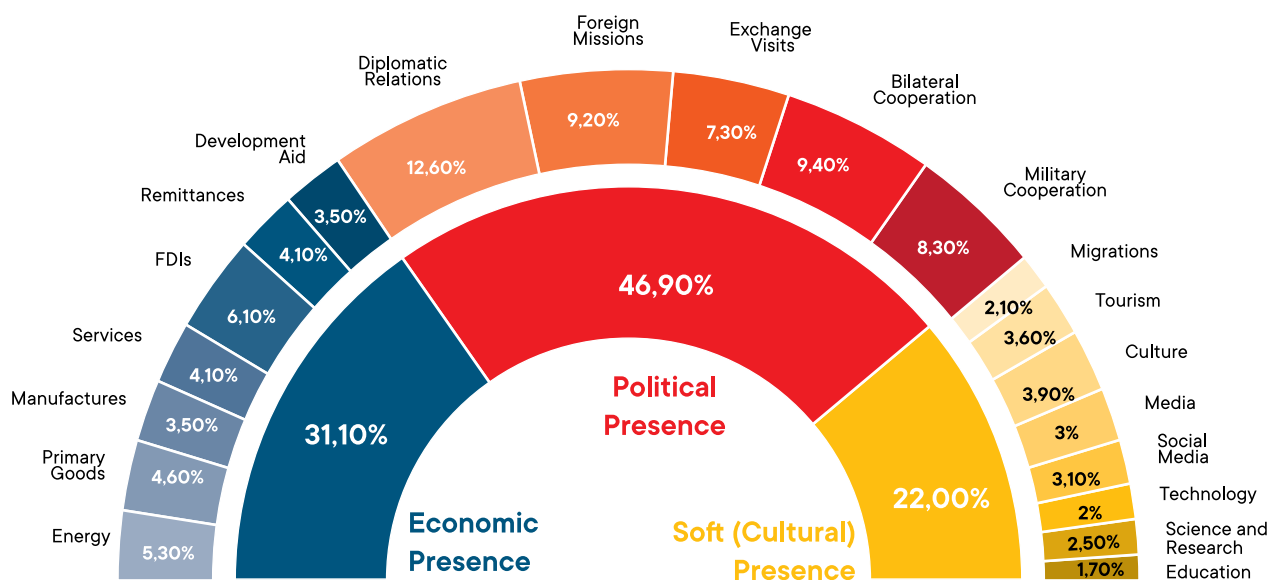
Graph 73. Image Observatory 2020 - Netherlands

21. CROATIA

Republic of Croatia
(Republika Hrvatska)

Group	EU member states
Population	4.105.493
Capital city	Zagreb
International code	(HR)
Date of establishing diplomatic relations	March 30, 1992
Gross Domestic Product (current prices, billions of dollars)	112,62
GDP growth rate (2018)	2,6 %
Rank 2019	9

i. International Impact Index



Graph 74. Overview of the presence of Croatia in 2019, by dimensions and variables

Croatia has a moderate economic presence in North Macedonia, mainly in terms of imports of products and services. The presence in the political dimension, however, has been most stable over the years. In each of the years of the Index, Croatia is on the 6th place. In terms of cultural presence, Croatia is stable at ninth place since 2010. This position is due to the closeness, linguistic and cultural, as well as the common history.

ii. Image Observatory

As expected, Croatia ranks high among our citizens. As many as 70% of them think that Croatia is a friendly country that has a positive attitude towards business and any other cooperation.

The developed coast, the proximity and the lavish offer for the citizens of North Macedonia makes the image of Croatia. More than half of the citizens think of tourism when this country is mentioned. Interestingly, 1% of citizens still associate this country with its president in the early 1990s, Franjo Tudjman.



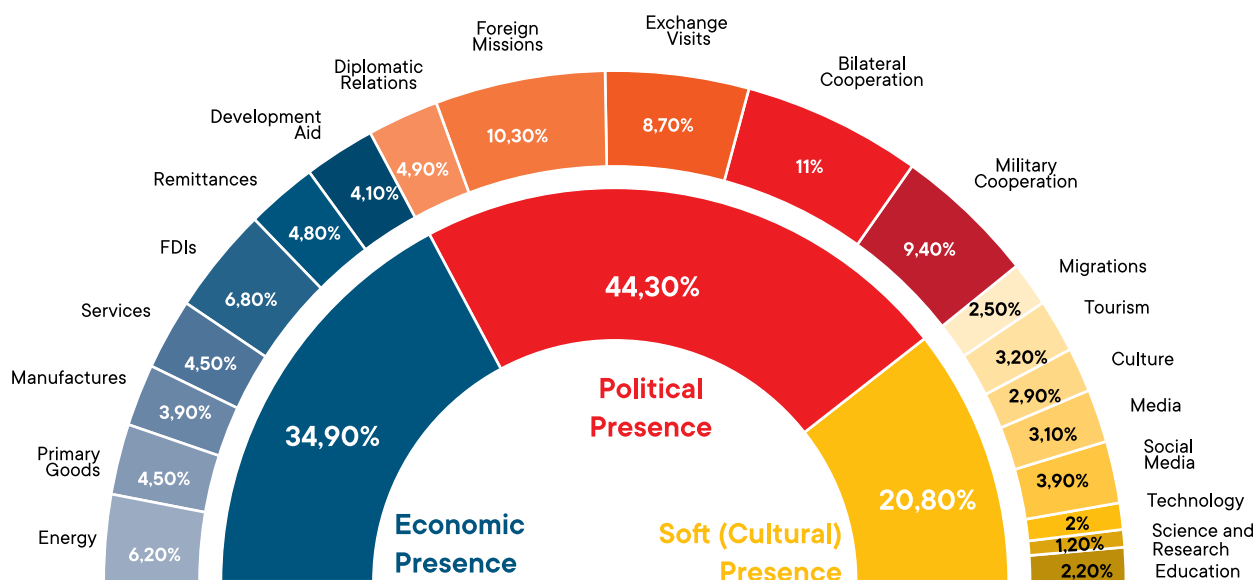
Graph 75. Image Observatory 2020 - Croatia

22. MONTENEGRO

Montenegro
(Crna Gora)

Group	Western Balkans
Population	622.359
Capital city	Podgorica
International code	(ME)
Date of establishing diplomatic relations	June 14, 2006
Gross Domestic Product (current prices, billions of dollars)	12,60
GDP growth rate (2018)	5,1%
Rank 2019	24

i. International Impact Index



Graph 76. Overview of the presence of Montenegro in 2019, by dimensions and variables

Montenegro has the lowest economic presence in North Macedonia. It comes from a small contribution only through the import of products. Even in the political dimension, the presence of Montenegro is at an extremely low level, the 22nd place, and one position higher is where Montenegro is ranked in the cultural dimension.

ii. Image Observatory

Like with the other countries from the former Yugoslavia, our citizens have an extremely positive opinion of Montenegro. As many as 65% of the citizens think that the relations between the two countries are good, friendly and a relationship of cooperation.

When it comes to the image of the state, for our citizens the first association is tourism, although the stereotype of Montenegrins as a lazy people is expressed as well. When it comes to leadership and association with Montenegro, then for the citizens of North Macedonia there is no difference between Prince Bishop Petar Petrovic - Njegos and the President of Montenegro, Milo Djukanovic.



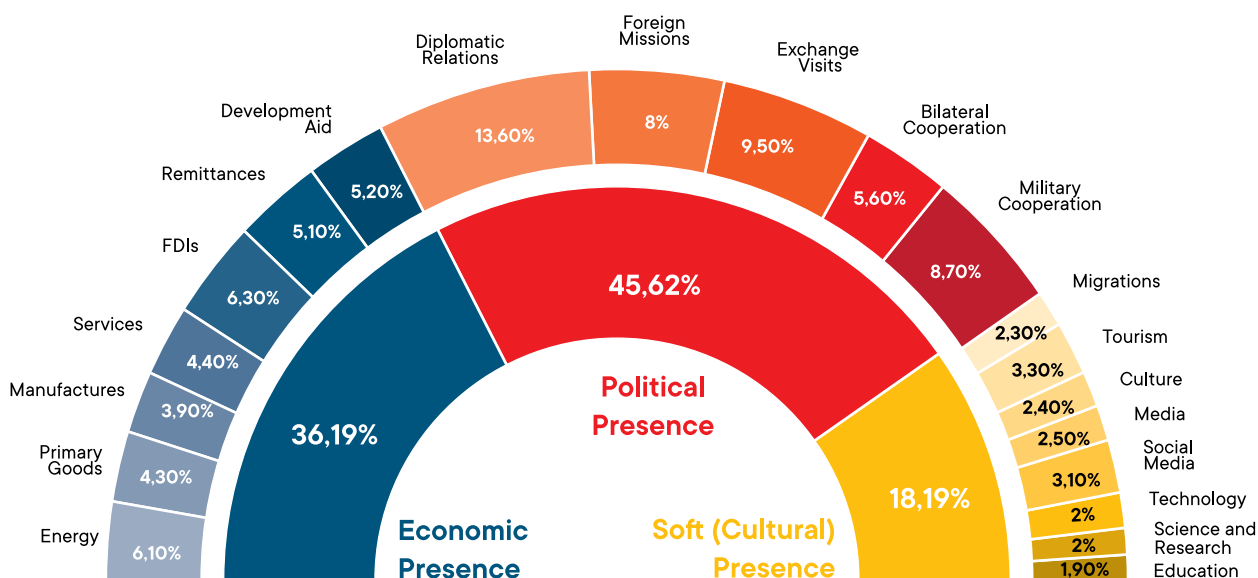
Graph 77. Image Observatory 2020 - Montenegro

23. SWEDEN

Kingdom of Sweden
(Konungariket Sverige)

Group	EU member states
Population	10.230.185
Capital city	Stockholm
International code	(SE)
Date of establishing diplomatic relations	December 20, 1993
Gross Domestic Product (current prices, billions of dollars)	564,77
GDP growth rate (2018)	2,2 %
Rank 2019	22

i. International Impact Index



Graph 78. Overview of Sweden's presence in 2019, by dimensions and variables

Sweden has a low economic presence in North Macedonia, but provides a contribution in all its elements from the import of products and services, through foreign direct investments to remittances and development aid.

The low presence of the economic dimension is repeated in the political and cultural. In the first, Sweden is in 20th place, while in the second in 22nd place.

ii. Image Observatory

The citizens of North Macedonia generally believe that Sweden has a positive attitude towards the country. Slightly more than a third of the respondents answered that the relations between the two countries are friendly, positive and cooperative.

When it comes to the image of Sweden as a country, then for our citizens the first association is the good life, the economy and democracy. However, Swedish democracy is most acceptable to supporters of SDSM and the Alliance for Albanians, 15.7% or 15.8%, while the Swedish economy is closer to the voters of Levica and VMRO-DPMNE, 27.3% or 15.3%.



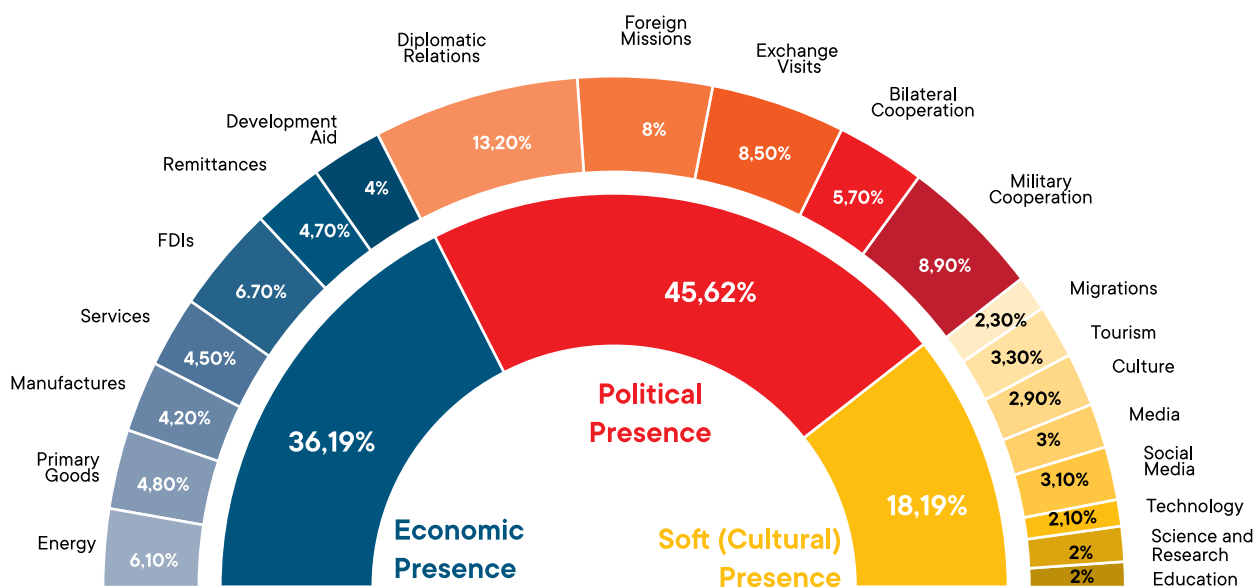
Graph 79. Image Observatory 2020 - Sweden

24. SPAIN

Kingdom of Spain
(Reino de España)

Group	EU member states
Population	46.658.447
Capital city	Madrid
International code	(ES)
Date of establishing diplomatic relations	July 28, 1994
Gross Domestic Product (current prices, billions of dollars)	1.923,64
GDP growth rate (2018)	2,4 %
Rank 2019	23

i. International Impact Index



Graph 80. Overview of Spain's presence in 2019, by dimensions and variables

Spain has a low economic presence in North Macedonia. It comes through a small contribution from the import of products and services, as well as foreign direct investments. As in the economic dimension, Spain has a low political presence in North Macedonia as well (21). The political dimension is actually shown through the low bilateral cooperation, as well as the small diplomatic mission. The position of the political dimension is also reflected in the cultural presence of Spain. All variables indicate the weak interest of this country in North Macedonia.

ii. Image Observatory

The low presence of Spain is confirmed by the Image Observatory. To the question “What is the first word describing the relations between Spain and North Macedonia?”, the highest percentage answered that they do not know, i.e. 41%, and an additional 12% consider Spain’s attitude towards the country as neutral. Of those citizens who do have an attitude towards Spain, 25% think that Spain has a positive attitude towards us.

Costa Blanca, Costa del Sol, sangria, paella, bullfight, Madrid and Barcelona are the main associations for Spain among our citizens. As many as 37% of citizens associate these terms with Spain. For some, culture is still the first thing, while for others it is sport. Interestingly, the COVID-19 pandemic also affects the association with Spain and tackling the disease, with 1% of the citizens associating this country with it.



Graph 81. Image Observatory 2020 - Spain

Annexes

X. Annex 1 – Data Sources

1. Economic presence

ENERGY

Total import of energy products in North Macedonia

SITC 3 – Mineral fuels, lubricants and related materials

1	Total import of oil and refined products by value by country Section 33 - Petroleum, Petroleum Products and Related Products	State Statistical Office www.stat.gov.mk
2	Total import of natural gas by value by country Section 34 - gas, natural and industrial	
3	Total import of coal by value by country Section 32 - coal, petcoke and briquettes	
4	Total import of electricity by value by exporting country Section 35 - electricity	

PRIMARY GOODS

Total import of primary goods, ie basic products

SITC 0 – Food and live animals; SITC 1 – Beverages and tobacco; SITC 6 – Manufactures classified mainly according to material; SITC 9 – Products and transactions not registered elsewhere;

1	Total import of food, by value by country SITC 0 – Food and live animals, From section 01 to section 08	State Statistical Office www.stat.gov.mk
2	Total import of beverages and tobacco, by value by country SITC 1 – Beverages and tobacco	
3	Total import of agricultural products, by value by country SITC 2 – Raw materials, non-edible, not including fuels, from section 21 to section 27	
4	Total import of colored materials, by value by country SITC 6 – Manufactures, mainly classified according to material, section 68	
5	Total import of non-monetary gold, by value by country SITC 9 – Products and transactions not registered elsewhere, section 97	

MANUFACTURES**Total import of manufactures**

SITC 5 – Chemicals and other products not mentioned elsewhere; SITC 6 – Manufactures, mainly classified according to material; SITC 7 – Machinery and transport equipment; SITC 8 – Various manufactures;

1	Total import of chemical products, by value by country SITC 5 – Chemicals and other products not mentioned elsewhere	State Statistical Office www.stat.gov.mk
2	Total import of machines and machine parts, by value by country SITC 7 – Machinery and transport equipment, from section 71 to section 77	
3	Total import of transport equipment, by value by country SITC 7 – Machinery and transport equipment, from section 78 to section 79	
4	Total import, of other manufactures and secondary products, by value by country SITC 6 – Manufactures, mainly classified according to material, from section 61 to section 65	
5	Total import of leather, leather manufactures and products; rubber and products; cork, wood and products; paper, cardboard, cellulose and products; yarn and fabric and textiles, by value by country SITC 6 – Manufactures, mainly classified by material, section 66	
6	Total import of non-metallic minerals, by value by country SITC 6 – Manufactures, mainly classified according to material, from section 67 to section 69	
7	Total import of iron and steel, non-ferrous metals, as well as metal products not mentioned elsewhere, by value by country SITC 8 – Various processed articles, from section 82 to section 85	
8	Total import of furniture, bedding, mattresses, mattress holders, pillows and stuffed products; travel products and bags; clothing and clothing accessories; footwear, by value by country SITC 8 – Various manufactures, from section 87 to section 88	

SERVICES**Total import of services**

1	Total import of services by value by country	UN Conference on Trade and Development https://bit.ly/2AUIUBn Eurostat https://bit.ly/32eLjkf
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FOREIGN DIRECT INVESTMENTS**Scope of foreign direct investments in North Macedonia**

1	Total volume of foreign direct investments, by country	National Bank of the Republic of North Macedonia www.nbrm.mk
2	Total gross inflow of foreign direct investment, by country	

REMITTANCES**Total amount of remittances per year**

1	Total gross inflow of remittances, by country	World Bank data.worldbank.org International Monetary Fund www.imf.org/en/Data
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DEVOLPMENT AID**Total amount of development aid per year**

1	Total gross amount of registered development aid, by country	Organization for Economic Co-operation and Development stats.oecd.org/# AidData Research Laboratory at the Institute for Global Research at William's & Mary University www.aiddata.org/ Secretariat for European Affairs https://bit.ly/3fw2xha The Federal Agency for the Commonwealth of Independent States, Compatriots Living Abroad and International Humanitarian Cooperation of Russia http://rs.gov.ru/en
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2. Political presence

DIPLOMATIC RELATIONS

Established diplomatic relations and duration of those relations between the two countries

1	Length of established diplomatic relations with North Macedonia	Ministry of Foreign Affairs - Diplomatic Missions Abroad https://bit.ly/3iWadet
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FOREIGN MISSIONS

Existence of a resident diplomatic mission, its size, mandate and capacity

1	Does the country have a resident diplomatic mission, its size, mandate and capacity, as well as the number of diplomatic and accompanying persons deployed in the country?	Ministry of Foreign Affairs - Accredited DCMs in the Republic of North Macedonia https://bit.ly/3etC0j0
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EXCHANGE VISITS

Number of incoming visits of public office holders and senior civil servants

1	Number of incoming visits by Heads of State and Government, Ministers of Foreign Affairs and other Ministers of Government, Cabinet Members, Secretaries of State or General Secretaries, Assistant Ministers, Political Directors, Free Ambassadors, Non-resident Ambassadors	Ministry of Foreign Affairs www.mfa.gov.mk
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BILATERAL COOPERATION

Level of bilateral political co-operation established through the number of political statements on North Macedonia, declarations and agreements signed, and number of twin cities

1	Total number of signed bilateral agreements	Ministry of Foreign Affairs - Diplomatic Missions Abroad https://bit.ly/3iWadet
2	Total number of twin cities	Ministry of Local Self-Government www.mls.gov.mk

MILITARY COOPERATION

Total military aid and soldiers deployed in North Macedonia

1	Total aid in equipment and arms given, by value, by country	Ministry of Defense www.mod.gov.mk
2	Total number of military-diplomatic personnel in North Macedonia, by country	
3	Total number of soldiers and command staff deployed in North Macedonia, by country	

3. Soft (cultural) presence

IMMIGRATION

Number of immigrants to the country

1	Total number of citizens with a passport from the respective country having a regulated stay in North Macedonia, by country	State Statistical Office www.stat.gov.mk
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TOURISM

Number of arrivals of tourists to the country

1	Total number of tourists visiting North Macedonia, by country	State Statistical Office www.stat.gov.mk
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CULTURE

Scope of cultural cooperation and exchange

1	Number of appearances of theater workers (actors and directors) and theater ensembles at the cultural institutions, by country	Access to public information
2	Number of appearances of artists-musicians (conductors, directors, soloists) and/or whole ensembles at the cultural institutions, by country	
3	Number of appearances by theater workers and artists-musicians (conductors, directors, actors, musicians-soloists) and/or whole ensembles/groups at the festivals, by country	

MEDIA

Total number of country-specific mentions by major media outlets

1	Total number of mentions in the headline and in the body text of the news, by major media outlet, by country	Media Monitoring
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SOCIAL MEDIA

Total number of mentions by social media users in North Macedonia, by country

1	Total number of mentions from the entire Twitter community, according to the principle of influence, i.e. posts on the confirmed profiles of public figures, organizations, institutions and political parties from North Macedonia on Facebook	Media Monitoring
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TECHNOLOGY

Scope of applications for the protection of industrial property rights in North Macedonia

1	Number of patents, trademarks, and industrial design protection applications in North Macedonia, by country of origin	<p>State Office for Intellectual Property Protection; https://bit.ly/2OnN2Md</p> <p>World Intellectual Property Organization https://bit.ly/2Zp5IH6</p> <p>Express base of industrial design protected under the Hague Agreement https://bit.ly/38WAH1b</p> <p>Express database of trademarks protected under the Madrid Agreement https://bit.ly/2C6mVH2</p>
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SCIENCE AND RESEARCH

Total number of scientific and expert papers, as well as research and policy documents

1	Number of scientific and expert papers referring to North Macedonia, i.e. where a citizen of North Macedonia appears as a co-author, as well as number of research and policy documents referring to North Macedonia, by country	Elsevier's Scopus database of authors, excerpts and citations https://bit.ly/32ajwSh
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EDUCATION

Number of students with or without scholarships in higher education in North Macedonia

1	Number of students in higher education in North Macedonia, by country	State Statistical Office www.stat.gov.mk
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4. Basic data

Factors used in data normalization		
1	<p>Economy</p> <p>Gross domestic product Gross domestic product growth rate</p>	<p>Statistics Center of the International Monetary Fund within the World Economic Outlook https://bit.ly/30ctmQK</p> <p>World Bank Statistical Center for National Accounts and Development Indicators https://bit.ly/30bXps5</p>
2	<p>Population</p>	<p>United Nations Statistical Office https://bit.ly/3frwtL3</p> <p>UN world population monitoring system https://bit.ly/38Yqqv5</p>

XI. Annex 2 - Overview of the international impact index

COUNTRIES	2000		2010		2019	
	Index points	Rank	Index points	Rank	Index points	Rank
Turkey	527.6	6	588.8	1	627.6	1
USA	580.3	2	548.1	5	610.2	2
Bulgaria	545.3	5	564.5	4	600.3	3
Germany	583.9	1	575.1	2	583.6	4
Serbia	545.7	4	571.1	3	559.8	5
Slovenia	546.1	3	541.6	6	545.9	6
Italy	523.7	7	533.0	7	515.9	7
United Kingdom	497.4	12	485.9	14	495.3	8
Croatia	513.3	8	502.1	9	492.7	9
Albania	500.2	11	492.9	11	489.3	10
Greece	491.0	13	505.2	8	486.8	11
The Russian Federation	489.0	16	490.8	13	486.7	12
Austria	489.5	15	479.1	15	475.4	13
France	512.2	9	501.4	10	473.2	14
China	490.4	14	476.3	16	467.5	15
Romania	461.5	21	456.0	19	462.6	16
Hungary	467.3	18	452.7	20	462.5	17
The Netherlands	504.6	10	492.9	12	460.1	18
Kosovo	395.5	24	433.4	23	454.7	19
Poland	473.3	17	466.9	17	452.7	20
Bosnia and Herzegovina	464.8	19	465.7	18	442.9	21
Sweden	461.9	20	448.9	22	434.1	22
Spain	448.6	22	450.5	21	424.6	23
Montenegro	407.7	23	409.5	24	413.6	24

Overview of the ranking of countries in the three years of the index

France	2000		2010		2019	
	Index points	Rank	Index points	Rank	Index points	Rank
Germany	1	694.9	1	666.0	1	670.5
USA	3	623.3	11	502.3	2	584.5
Turkey	14	467.2	6	545.8	3	583.7
United Kingdom	9	502.5	9	505.0	4	559.7
Italy	5	570.1	3	560.3	5	547.7
Greece	2	627.5	2	629.2	6	547.2
Serbia	6	533.2	5	549.8	7	539.2
Slovenia	4	595.7	7	541.8	8	522.3
Bulgaria	11	487.8	4	553.9	9	520.6
Austria	8	503.1	12	480.2	10	501.0
The Netherlands	7	517.0	10	502.5	11	488.6
China	10	495.8	15	454.8	12	482.2
The Russian Federation	13	468.8	13	475.9	13	473.7
Hungary	17	443.0	22	432.7	14	461.0
Poland	16	445.2	18	438.6	15	455.7
Croatia	15	466.4	14	472.9	16	445.9
Sweden	19	435.3	17	440.9	17	445.5
France	12	481.8	8	512.2	18	439.4
Romania	22	415.8	21	432.9	19	439.1
Spain	20	428.0	23	432.1	20	433.5
Kosovo	23	412.7	19	437.7	21	432.5
Bosnia and Herzegovina	21	421.5	16	448.6	22	431.6
Albania	18	438.9	20	433.5	23	428.1
Montenegro	24	412.7	24	418.7	24	420.4

Overview of the ranking of countries in the three years of the index - Economic presence

COUNTRY	ENERGY	PRIMARY GOODS	MANUFACTURES	SERVICES	FOREIGN DIRECT INVESTMENTS	REMITTANCES	DEVELOPMENT AID
Albania	448.2	438.7	414.2	423.4	428.2	419.5	417.3
Austria	446.3	420.5	400.2	478.6	618.4	595.0	485.4
Bosnia and Herzegovina	449.8	483.3	408.8	423.4	418.6	419.5	417.3
Bulgaria	580.9	524.5	462.7	671.2	527.0	419.5	433.1
China	446.3	429.5	659.9	427.0	465.6	419.5	572.7
Croatia	448.7	509.2	423.7	452.6	441.6	419.5	426.6
France	446.8	444.6	461.4	430.3	419.1	445.9	437.2
Germany	458.0	559.7	838.7	479.3	706.7	1000.0	685.9
Greece	626.1	492.0	461.0	813.1	547.9	437.1	420.5
The Netherlands	450.9	452.0	464.8	435.3	680.5	419.5	424.4
Hungary	454.7	452.0	507.8	472.9	484.5	419.5	429.4
Italy	452.7	514.8	615.8	488.6	518.6	840.7	420.3
Kosovo	454.0	453.3	406.6	422.3	441.3	419.5	417.3
Montenegro	446.3	423.0	399.0	422.7	410.6	419.5	417.3
Poland	447.1	530.4	517.1	433.3	439.7	419.5	418.9
Romania	471.5	448.6	472.7	431.4	412.8	419.5	424.1
The Russian Federation	718.7	422.4	410.6	433.6	434.4	419.5	417.3
Serbia	669.8	783.7	521.4	484.8	472.4	419.5	417.3
Slovenia	465.3	483.3	484.8	468.9	632.8	524.8	553.4
Spain	447.8	462.5	435.8	432.1	419.6	419.5	420.2
Sweden	454.6	422.6	411.6	434.8	404.7	463.4	550.0
Turkey	451.6	583.4	606.6	424.1	723.9	612.6	653.7
United Kingdom	446.3	553.4	573.8	1000.0	467.4	437.1	533.3
USA	591.7	459.5	526.5	435.1	510.1	630.1	1000.0

Overview of the economic presence for 2019

Country	2000		2010		2019	
	Index points	Rank	Index points	Ранг	Index points	Rank
Bulgaria	559.0	3	575.9	2	676.5	1
Turkey	584.4	1	616.3	1	645.2	2
Slovenia	547.6	4	550.0	4	609.5	3
USA	567.6	2	562.7	3	581.5	4
Германија	504.3	12	510.3	9	522.6	5
Croatia	542.9	5	518.5	6	519.6	6
The Russian Federation	494.4	16	505.8	11	508.1	7
Serbia	516.1	7	497.1	14	506.3	8
Italy	508.3	10	510.4	8	504.4	9
Albania	514.3	8	533.0	5	503.9	10
Romania	499.2	14	498.7	13	502.9	11
Hungary	490.3	17	489.3	18	502.1	12
France	542.1	6	499.7	12	496.4	13
Austria	490.3	18	490.3	16	487.9	14
Bosnia and Herzegovina	484.9	20	489.9	17	475.9	15
United Kingdom	496.2	15	478.2	19	470.7	16
China	504.3	13	495.9	15	466.8	17
Poland	504.9	11	506.1	10	459.9	18
The Netherlands	513.0	9	511.7	7	451.3	19
Sweden	488.1	19	477.3	20	443.2	20
Spain	465.4	21	470.6	21	422.8	21
Montenegro	385.7	23	401.1	22	412.3	22
Kosovo	360.4	24	400.3	23	405.6	23
Greece	395.0	22	382.3	24	389.5	24

Overview of the ranking of countries in the three years of the index - Political presence

COUNTRY	DIPLOMATIC REALTION	FOREIGN MISSIONS	EXCHANGE VISITS	BILATERAL COOPERATION	MILITARY COOPERATION
Albania	566.4	460.6	417.3	639.0	439.8
Austria	537.9	498.6	537.1	409.6	437.0
Bosnia and Herzegovina	566.4	443.5	417.3	500.2	437.4
Bulgaria	566.4	485.3	1000.0	869.6	514.8
China	566.4	488.7	417.3	311.6	511.8
Croatia	595.0	501.4	417.3	603.9	474.4
France	566.4	528.7	477.2	451.4	437.2
Germany	566.4	589.3	597.1	397.0	437.0
Greece	0.0	546.4	537.1	471.5	474.6
The Netherlands	566.4	417.1	417.3	389.5	437.0
Hungary	537.9	496.3	477.2	519.3	474.4
Italy	566.4	498.9	417.3	432.3	586.6
Kosovo	309.7	450.3	417.3	434.3	437.0
Montenegro	195.6	469.0	417.3	590.7	450.6
Poland	566.4	443.5	417.3	408.1	437.0
Romania	509.4	501.3	417.3	623.5	474.4
The Russian Federation	537.9	616.1	417.3	396.5	549.2
Serbia	480.9	504.8	417.3	676.3	475.5
Slovenia	595.0	548.9	896.7	572.2	437.0
Spain	537.9	375.7	417.3	312.6	437.2
Sweden	566.4	382.5	477.2	316.6	437.0
Turkey	595.0	616.1	477.2	884.2	691.0
United Kingdom	566.4	471.5	477.2	328.7	474.4
USA	509.4	639.2	477.2	460.4	820.8

Overview of the political presence for 2019

Country	2000		2010		2019	
	Index points	Rank	Index points	Rank	Index points	Rank
USA	537.2	5	591.7	3	712.2	1
Serbia	627.8	1	760.5	1	705.3	2
Turkey	506.2	8	600.6	2	661.6	3
Kosovo	441.4	24	495.9	11	593.8	4
Greece	471.1	13	562.1	5	593.0	5
Germany	570.9	3	563.6	4	570.7	6
Bulgaria	610.0	2	558.0	6	569.4	7
Albania	569.9	4	505.1	10	557.6	8
Croatia	527.4	6	515.2	9	512.2	9
Italy	481.0	12	536.2	7	488.4	10
France	499.0	9	487.5	12	479.3	11
The Russian Federation	510.4	7	483.3	13	462.8	12
Slovenia	462.8	16	523.8	8	450.9	13
China	452.4	20	470.1	15	445.1	14
United Kingdom	491.8	11	470.9	14	442.6	15
Poland	452.6	19	430.7	20	433.0	16
The Netherlands	466.7	14	438.1	19	432.3	17
Romania	456.8	18	403.8	23	416.1	18
Spain	446.9	22	438.5	18	414.0	19
Austria	465.7	15	454.2	16	407.6	20
Montenegro	446.0	23	412.0	21	405.4	21
Sweden	450.1	21	402.5	24	396.7	22
Bosnia and Herzegovina	492.5	10	442.4	17	392.1	23
Hungary	458.5	17	408.3	22	381.7	24

Overview of the ranking of countries in the three years of the index - Soft presence

COUNTRY	Immigra-tion	Tourism	Culture	Media	Social Media	Technology	Science and Research	Education
Albania	685.6	506.7	505.3	678.3	613.5	391.2	500.0	501.9
Austria	436.9	389.2	398.3	355.8	351.5	490.4	500.0	438.6
Bosnia and Herzegovina	441.7	383.7	373.7	345.9	331.2	411.2	500.0	449.3
Bulgaria	462.1	706.3	669.9	497.8	641.4	473.4	500.0	448.7
China	423.3	411.2	373.7	473.1	427.4	744.1	281.8	439.2
Croatia	451.4	494.5	695.6	467.9	428.8	474.4	718.2	444.9
France	430.1	382.0	506.9	550.3	493.3	552.6	500.0	438.6
Germany	480.6	555.8	482.2	541.2	637.4	734.1	718.2	446.8
Greece	448.5	718.1	421.4	865.2	787.2	407.2	281.8	443.6
The Netherlands	419.4	535.9	416.4	366.4	385.0	410.2	500.0	438.6
Hungary	417.4	375.8	439.5	358.2	350.0	396.2	281.8	437.9
Italy	440.8	412.1	737.4	459.0	443.4	503.4	500.0	438.6
Kosovo	664.2	491.1	395.0	657.1	733.0	398.2	500.0	920.8
Montenegro	438.8	364.4	431.4	400.9	442.5	385.1	281.8	474.0
Poland	423.3	564.7	418.1	361.0	359.2	414.2	500.0	437.9
Romania	424.2	448.6	518.6	342.2	330.8	387.1	500.0	438.6
The Russian Federation	452.4	358.4	572.7	531.3	530.8	457.3	281.8	438.6
Serbia	681.7	732.0	754.5	669.7	758.8	509.5	936.4	583.5
Slovenia	425.2	441.4	487.2	379.6	395.2	446.3	718.2	439.8
Spain	427.2	387.1	452.8	393.8	360.9	425.2	500.0	437.9
Sweden	420.4	394.1	375.3	337.8	369.9	417.2	500.0	437.9
Turkey	1000.0	1000.0	419.7	486.2	436.6	498.4	500.0	1000.0
United Kingdom	439.8	401.3	508.6	480.6	440.1	509.5	281.8	438.6
USA	464.1	443.7	591.0	1000.0	951.4	1000.0	718.2	441.1

Overview of soft presence for 2019

XIII. Annex 3 – Survey questionnaire

1. POLITICAL PRESENCE

i. Neighborhood policy

We would like to ask you a few questions regarding the relationship of the Republic of North Macedonia with the neighboring countries.

1. In general, would you say that the Republic of North Macedonia has very good, good, bad or very bad relations with neighboring countries?
 - 1) Very good
 - 2) Good
 - 3) Bad
 - 4) Very bad
 - 5) Other _____
 - 6) I do not know / I refuse to answer

2. Which neighboring country is the best friend of the Republic of North Macedonia? Rank them on a scale of 1 to 5, where 5 means it has the friendliest relationship and 1 the least friendly relationship with Macedonia.
 - 1) Serbia
 - 2) Bulgaria
 - 3) Greece
 - 4) Albania
 - 5) Kosovo
 - 6) All our neighbors are our friends (unreadable)
 - 7) No neighbor is our friend (unreadable)

ii. Relations with other countries as well

To expand the circle and continue further analyzing the relationship of the Republic of North Macedonia with neighboring countries, but also with other countries and international alliances / unions.

3. In general, which country or international alliance/union is Macedonia's best friend?
(These answers are not readable, options are provided for help)
 - 1) Serbia
 - 2) Bulgaria
 - 3) Greece
 - 4) Albania
 - 5) Kosovo
 - 6) Germany
 - 7) USA
 - 8) United Kingdom
 - 9) China

- 10) Turkey
- 11) Russia
- 12) Slovenia
- 13) Croatia
- 14) EU
- 15) NATO

4. In your opinion, with which country or international alliance/union does the Republic of North Macedonia have the most common values/interests and therefore should cultivate the closest relations? (These answers are not readable, options are provided for help)

- 1) Serbia
- 2) Bulgaria
- 3) Greece
- 4) Albania
- 5) Kosovo
- 6) Germany
- 7) USA
- 8) United Kingdom
- 9) China
- 10) Turkey
- 11) Russia
- 12) Slovenia
- 13) Croatia
- 14) EU
- 15) NATO

4.1 (Open question, more possible answers) What are those values/interests (for the country with which they think we have the most common values/interests):

(These answers are not readable, options are provided for help)

- 1) Culture
- 2) Religion
- 3) Identity
- 4) Language
- 5) History
- 6) Tradition
- 7) Security
- 8) Economic development
- 9) Geopolitically
- 10) Other _____
- 11) I do not know / I refuse to answer

5. Over the past few decades, many countries and international alliances/unions have indirectly or directly contributed to the development of the Republic of North Macedonia. In your opinion, which country or international alliance/union has contributed the most to the improvement of the democratic and economic situation in our country? (These answers are not readable, options are provided for help)

- Germany
- 2) USA
- 3) United Kingdom
- 4) China
- 5) Turkey
- 6) Russia
- 7) Slovenia
- 8) Croatia

- 9) Sweden
- 10) France
- 11) Italy
- 12) EU
- 13) NATO
- 14) None of the above
- 15) I do not know / I refuse to answer

iii. Good Neighborliness, Friendship, Cooperation and Strategic Partnership Agreements

Now we would like to talk a bit about two bilateral agreements that the Republic of North Macedonia signed with its neighbors, the Agreement on Good Neighborliness, Friendship and Cooperation with Bulgaria and the Prespa Agreement with Greece.

6. On a scale from 1 to 5, where 5 means completely positive and 1 completely negative, in order to evaluate the Agreement on Good Neighborliness, Friendship and Cooperation between the Republic of North Macedonia and the Republic of Bulgaria?

6.1 (Only for those who answered P1 with 5 or 4) What are the reasons why you evaluate it as positive.

(These answers are not readable; options are provided for help. More answers are possible)

- 1. Full membership in NATO
- 2. Opening negotiations with the EU / EU accession
- 3. Improved regional policy
- 4. Improved economic co-operation with Bulgaria
- 5. All of the listed above
- 6. None of the suggested answers
- 7. I do not know / I refuse to answer
- 8. Other _____

6.2 (Only for those who answered P1 with 2 or 1) What are the reasons why you evaluate it as negative.

(These answers are not readable; options are provided for help. More answers are possible)

- 1. There is a possibility that we will lose the Macedonian language
- 2. There is a possibility that we will lose part of our history
- 3. There is a possibility that we will lose our identity
- 4. We lost more than we gained
- 5. No matter the agreement, we will get block again from joining the EU
- 6. All listed answers
- 7. None of the suggested answers
- 8. I do not know / I refuse to answer
- 9. Other _____

7. On a scale from 1 to 5, where 5 means completely positive and 1 completely negative, how would you rate the Prespa Agreement between the Republic of North Macedonia and the Republic of Greece?

7.1 (Only for those who answered P1 with 5 or 4) What are the reasons why you evaluate it as positive.

(These answers are not readable; options are provided for help. More answers are possible)

- 1. Full membership in NATO
- 2. Opening negotiations with the EU / EU accession
- 3. Improved regional policy
- 4. Improved economic co-operation with Greece
- 5. All listed answers (unreadable)
- 6. None of the suggested answers (not read)
- 7. I do not know / I refuse to answer
- 8. Other _____

7.2 (Only for those who answered P1 with 2 or 1) What are the reasons why you evaluate it as negative.

(These answers are not readable; options are provided for help. More answers are possible)

1. The change of the constitutional name of our country
2. We have lost part of our history
3. We have lost our identity
4. We lost more than we gained
5. No matter the agreement, we will get block again from joining the EU
6. All listed answers
7. None of the suggested answers
8. I do not know / I refuse to answer
9. Other _____

2. ECONOMIC PRESENCE

The next set of questions is related to the economic relations of the Republic of North Macedonia.

8. In general, would you say that the Republic of North Macedonia has very good, good, bad or very bad economic/trade relations with its neighboring countries?

1. Very good
2. Good
3. Bad
4. Very bad
5. I do not know / I refuse to answer
6. Other _____

9. In general, regarding the economic relations between the Republic of North Macedonia and the neighboring countries, do you believe that:

1. Macedonia benefits more from them
2. Neighboring countries benefit more from us
3. The benefit is equal for all parties
4. I do not know / I refuse to answer
5. Other _____

10. Which country is the largest economic/trade partner of the Republic of North Macedonia?

1. Serbia
2. Bulgaria
3. Greece
4. Albania
5. Kosovo
6. Germany
7. USA
8. United Kingdom
9. China
10. Turkey
11. Russia
12. Slovenia
13. Croatia

11. (For the country indicated in P10.) In your opinion, in which of the following areas does the Republic of North Macedonia cooperate the most with the stated country?
1. Energy
 2. Primary goods
 3. Culture
 4. Education
 5. Services
 6. Tourism
 7. Military cooperation
 8. Other _____
 9. I do not know / I refuse to answer
12. In general, from which country does the Republic of North Macedonia imports products and goods the most?
(These answers are not readable, options are provided for help)
1. Serbia
 2. Bulgaria
 3. Greece
 4. Albania
 5. Kosovo
 6. Germany
 7. USA
 8. United Kingdom
 9. China
 10. Turkey
 11. Russia
13. Foreign direct investment is often talked about. In your opinion, which country has the most direct investments in the Republic of Macedonia? (These answers are not readable, options are provided for help)
1. Serbia
 2. Bulgaria
 3. Greece
 4. Albania
 5. Kosovo
 6. Germany
 7. USA
 8. United Kingdom
 9. China
 10. Turkey
 11. Russia
14. In your opinion, which country or alliance/union has donated the most for the development of the Republic of Macedonia? (These answers are not readable, options are provided for help)
1. Sweden
 2. Bulgaria
 3. Greece
 4. Germany
 5. Italy
 6. France
 7. USA
 8. United Kingdom
 9. China
 10. Turkey
 11. Russia
 12. EU

3. SOFT OR CULTURAL PRESENCE

15. In your opinion, what is the number of tourists who visit the Republic of North Macedonia annually?
1. From 0 to 100,000 tourists
 2. From 100,000 to 400,000 tourists
 3. From 400,000 to 700,000 tourists
 4. From 700,000 to 1,000,000 tourists
 5. More than 1,000,000 tourists
 6. Other _____
 7. I do not know / I refuse to answer
16. In your opinion, from which country do most of the people who visit Republic of North Macedonia come from?
(These answers are not readable, options are provided for help)
1. Serbia
 2. Bulgaria
 3. Greece
 4. Albania
 5. Kosovo
 6. Germany
 7. United Kingdom
 8. Netherlands
 9. China
 10. Turkey
 11. Russia
 12. USA
17. What are the main reasons why residents of foreign countries visit the Republic of North Macedonia?
1. Tourism
 2. Business
 3. For both reasons, but predominantly due to tourism
 4. For both reasons, but predominantly for business
 5. Family reasons / ancestral connection
 6. Other _____
 7. I do not know / I refuse to answer
18. When the following countries are mentioned, what is the first word that comes to your mind, as an association for the country::
- All 24 country are placed here
19. When the following countries are mentioned the first word that comes to your mind and describes the attitude towards Macedonia:
- All 24 country are placed here
20. In your opinion, with which country does the Republic of North Macedonia have the greatest cooperation in terms of culture?
1. Albania
 2. Serbia
 3. Bulgaria
 4. Russia
 5. Poland
 6. Slovenia
 7. Croatia
 8. All neighbors equally (unreadable)
 9. None (unreadable)

21. Which nation culturally has the greatest influence on the population of the Republic of North Macedonia?
- Open question all 24 countries are placed here
22. Which cultural event organized on the territory of the Republic of North Macedonia is the most recognizable in the neighboring countries? (These answers are not readable, options are provided for help)
1. Ohrid Summer Festival
 2. Skopje Jazz Festival
 3. Taksirat Festival
 4. International Cinematographer's Film Festival "Brothers Manaki"
 5. None of the above

4. DEMOGRAPHY

1. How old are you?
 1. Under 18
 2. 18-29
 3. 30-39
 4. 40-49
 5. 50-59
 6. 60-69
 7. More than 70
2. What is your ethnicity?
 1. Macedonian
 2. Albanian
 3. Serb
 4. Turk
 5. Roma
 6. Vlach
 7. Bosniak
 8. Other (encode)
3. Where do you live?
 1. In an urban environment (in a city)
 2. In a rural area (in the countryside)
4. What is the highest level of education you have completed (if you are currently in school - the highest level of degree obtained)?
 1. Unfinished primary education
 2. Primary education
 3. Secondary Education
 4. High education
 5. Master's degree
 6. PhD
5. Are you currently...?
 1. Employed for salary in the public sector
 2. Employed for salary in the private sector
 3. Employed for salary in the civil sector
 4. Self-employed
 5. Unemployed, looking for a job
 6. Unemployed, not looking for a job
 7. Housewife

8. Student
 9. Retired
 10. Persons with bodily or sensory disabilities
 11. Other, specify _____
6. Gende
1. M
 2. F
7. In which region do you live in?
1. Skopje
 2. Northeast
 3. East
 4. Southeast
 5. Povardarski
 6. Pelagonija
 7. Southwest
 8. Polog
8. Which party did you vote for in the last parliamentary elections held in December 2016?
1. VMRO-DPMNE
 2. SDSM
 3. Alliance of Albanians
 4. BESA
 5. DUI
 6. DPA
 7. Levica
 8. None / I scratched the leaflet
 9. I did not go to the polls
 10. Refuses to answer
 11. Another, specify _____
10. And the last question. If parliamentary elections are held on Sunday, for which party will you vote:
1. VMRO-DPMNE
 2. SDSM
 3. Alliance of Albanians
 4. BESA / Bilal Kasami
 5. BESA / Afrim Gasi
 6. DUI
 7. DPA
 8. Levica
 9. None / I will scratch the leaflet
 10. I will not go to the polls
 11. Refuses to answer
 12. Another, specify _____

XII. Annex 4 – Weighting the variables questionnaire

1. Measuring the presence of a country in North Macedonia in 3 dimensions, what weight would you assign to each of them?

They must total 100%

- ECONOMIC presence (**energy, primary goods, manufactures, investments, development aid**)
- POLITICAL presence (**cooperation, missions, relations**)
- SOFT presence (**migrations, tourism, culture, technology, science and education, media, social media**)

2. What weight would you assign to each of the 5 variables of the Economic dimension?

They must total 100%

- Energy (**oil, gas, coal and electricity**)
- Primary goods (**food, tobacco and beverages, agriculture, mining, etc.**)
- Manufactures (**chemical products, machinery, secondary products, leather, furniture, other products...**)
- Foreign Direct (**stock and inflow of foreign direct investment**)
- Development Aid (**gross registered aid**)

3. What weight would you assign to each of the 6 variables of the Political dimension?

They must total 100%

- Diplomatic relations (**longevity of diplomatic relations**)
- Foreign Missions (**capacity of foreign missions, scope and size**)
- Exchange visits (**heads of state and government, presidents of parliament, ministers, junior ministers, high ranking civil servants, ambassadors, etc.**)
- Bilateral Cooperation (**bilateral agreements and twinning**)
- Military Cooperation (**military aid, military-diplomatic personnel, military personnel**)

4. What weight would you assign to each of the 8 variables of the soft dimension?

They must total 100%

- Immigration (**stock of internationals**)
- Tourism (**tourist arrivals**)
- Culture (**cultural exchange and cooperation**)
- Media (**news, internet sites, mentions...**)
- Social Media (**Facebook, Twitter, mentions...**)
- Technology (**patents, trade-marks and industrial design applications**)
- Science (**research and policy publications published**)
- Education (**foreign students in tertiary education**)

5. With the publication of the results, we will acknowledge the contributions of all methodology verifiers. If you do not want your participation to be public, please, tick this box.

6. Do you have any comment or suggestion that you would like to include/share with us?

Thank you very much for your collaboration, which is essential to our project.

The International Impact Index 2019 study, financed by USAID and implemented by the PRESPA Institute, is a welcome new addition to the numerous think tank reports produced in the Western Balkans. It is also a refreshingly innovative idea and approach that opens up novel possibilities for our understanding of the complex political dynamics in the region. The study measures foreign presence in North Macedonia and for that purpose it adopts and adjusts the methodology of the prestigious Spanish think tank Elcano Royal Institute and its Global Presence Index, a flagship observatory measuring international activity and influence.

The authors are cautious not to equate presence with influence. Indeed, exerting influence is contingent on multiple factors, beyond the ones measured by the study. But the authors are too modest in not highlighting that what may be observed as presence is sine-qua-non for potential influence. For all practical purposes, the latter can hardly emerge without the existence of the former. Thus, when the PRESPA Institute measures, in a methodologically rigorous and conceptually solid manner, the presence of different countries in North Macedonia they are offering data about political potentials for those willing to see. They also provide crucial information for Western policy makers that enables them to develop evidence-based policy; so long as the vision and willingness to respond to the policy challenges is there.

The findings are extremely interesting and it would be valuable if raw data were made available to interested researchers. Reading the report, one quickly realizes that the authors were constrained by the necessity to be succinct and that many more useful insights can be generated through further analysis of the data. There are unsurprising findings that point, for example, to North Macedonia's robust linkages with EU countries, the geopolitical attractiveness of the country or the increasing presence of Germany in the region.

But other insights, though not necessarily counter-intuitive, certainly call for further analysis. Among the most interesting findings is the obvious mismatch between the media and policy hype about the geopolitical challenge presented by global non-Western players, such as China and Russia, and their actual footprint in North Macedonia, which remains for now, and compared to that of others, quite limited. In contrast, Turkey tops the list of foreign presence, demonstrating that long-term and multi-level engagement with a country, one that is grounded on historical and cultural links, can go a long way in building potential for influence. Similarly, we see the solid presence of neighboring countries Serbia and Bulgaria; the study, thus, proves empirically the significance of long-standing political and cultural connections and the potential influence of smaller nations, features that often go unnoticed by analysts.

These and many other insights make fascinating read. The PRESPA Institute is a newcomer to the competitive and volatile regional think tank landscape of Southeast Europe where success and longevity are anything but guaranteed. Still, their path-breaking new report should award them the reputation of one of the most promising policy think tanks in the region.

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