



POLICY BRIEF: ADVANCING DIGITAL INCLUSION IN NORTH MACEDONIA

July 2025

Current Situation in North Macedonia

Digital inclusion is increasingly prioritized in North Macedonia's political agenda, reflected in legislation and strategies such as the Draft National ICT Strategy (2023–2030), National Development Strategy (2024–2044), and Draft Law on Accessibility of Websites and Mobile Applications (2024). Policies extend beyond access and infrastructure to include competence development and social inclusion, addressing vulnerable groups like

persons with disabilities and the elderly through cybersecurity education and accessible e-services. However, the framework is fragmented, and cross-sectoral coherence is lacking, with digital inclusion scattered across sectors like education, health, and employment. Alignment with EU standards is progressing via adoption of GDPR-aligned data protection laws, NIS2 Directive, and the Digital Europe Programme, but gaps remain in regulatory implementation.

Basic Indicators





- GDP (2023)**
USD 15.76 billion (nominal)
USD 11.68 billion (real)
- Education Levels (2021)**
27.7% primary only, 44.8% upper-secondary
19.6% higher education 1.2% illiteracy.
- At Risk of Poverty (2021)**
22.9%
- Population Over 65**
17.2%
- Rural Population**
38.4%
- Households with internet Access (2024)**
90.8% - 92.1% urban, 88.5% rural
- Population Using Internet (2024)**
93.6% (94.8% male; 92.4% female; 81.9% aged 65–74)
- Using E-Government Services**
7% (national platform, 2024), 32% (overall, 2021).
- Digital Skills**
35% with at least basic skills.

Vulnerable Groups and Factors of Vulnerability

- Persons with Disabilities**
Lack of assistive technologies (two-thirds without access), inaccessible websites, and limited digital skills hinder participation.
- Elderly (65+)**
Low digital literacy (81.9% internet use vs. 93.6% overall) and limited access to user-friendly tools. Lack of targeted programs for digital inclusion.
- Low-Income Households**
Affordability barriers to devices and broadband, exacerbating economic exclusion.
- Rural Populations**
Lower broadband penetration (88.5% household access vs. 92.1% urban) and infrastructure gaps.
- Roma Communities**
Scarcity of targeted programs, low digital skills, and access barriers.
- Children and Youth in Institutions**
Uneven school infrastructure; 36% lack computers/tablets for digital learning.
- Unemployed and Low-Education Adults**
Basic digital skills gap (35% overall) limits job access and e-services use.

MAIN CHALLENGES AND RECOMMENDATIONS

Challenges

-  North Macedonia faces fragmented policies without a clear digital inclusion definition, leading to inconsistent implementation across sectors.
-  Monitoring and evaluation are weak, with no public reports on progress, and reliance on donor funding undermines sustainability. Vulnerable groups experience persistent barriers: urban-rural divides (4.6% gap in household internet access), low digital skills (35% basic proficiency vs. EU's 56%), and inaccessible e-services (e.g., only 33% schools with assistive technology). Institutional coordination is poor, with governance discontinuities delaying strategies like the ICT plan. Private sector is sporadically engaged in improving digital inclusion across society.
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RECOMMENDATIONS

General

Define digital inclusion comprehensively in a unified national policy, incorporating dynamic aspects like evolving technologies and usage purposes. Establish the Agency for Digital Transformation for better coordination and create a national fund blending state and donor resources for sustainable financing of digital inclusion programs. Leverage and further enhance collaborations with CSOs on digital inclusion. Enhance monitoring via a centralized dashboard for transparency and intra-institutional data-sharing.



SPECIFIC FOR VULNERABLE GROUPS

For persons with disabilities and elderly, mandate WCAG compliance for all public websites and subsidize assistive tools (e.g., text-to-speech). For rural and low-income groups, expand broadband vouchers and device donations, targeting 100% rural coverage by 2030. For Roma and youth, integrate tailored digital literacy in schools and VET, aiming for 68% youth with average+ skills by 2027. Support partnerships between CSOs and local institutions for community training, focusing on elderly via pensioner associations. Support successful digital inclusion informal or CSOs initiatives such as Doniraj Kompjuter and Brainster vouchers for digital education.

GOOD OR PROMISING POLICY EXAMPLE

The National Strategy for People with Disabilities (2023–2030), implemented by the Ministry of Labor and Social Policy with support from the Ministry of Digital Transformation and CSOs, focuses on digital accessibility as a tool for inclusion. Key actions include digitizing social security procedures, providing schoolbooks in audio/Braille formats, and adapting e-services for full participation. The implementation of this strategy has contributed to the increased enrollment of students with special needs in mainstream schools by 10% in 2023/2024, with 820 educational assistants deployed. This Strategy aligns with UN CRPD and EU standards, offering a replicable model for cross-sectoral policy to reduce digital exclusion for the population with disabilities.