

Macedonia

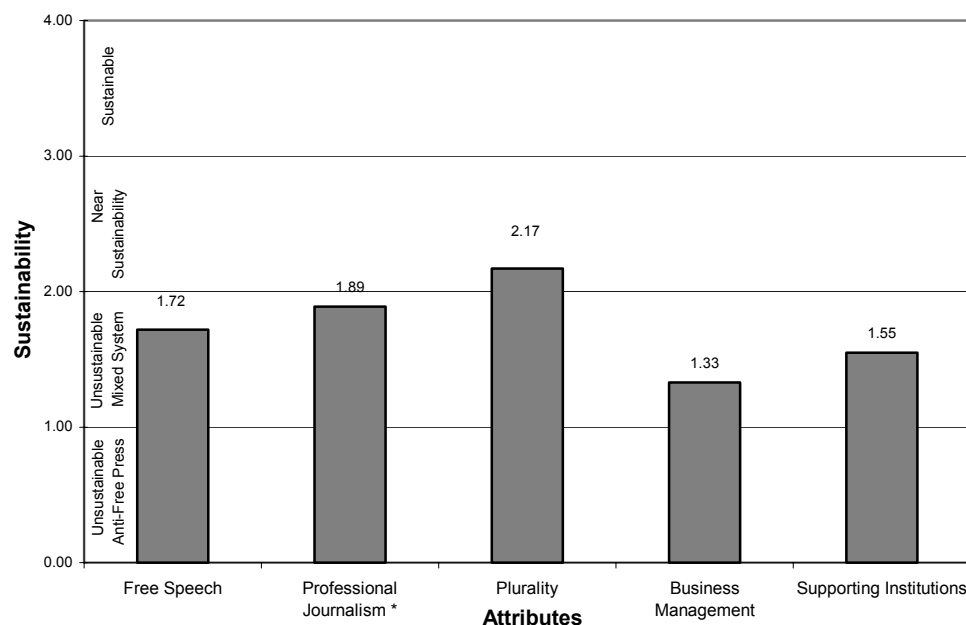
Introduction

Note: IREX has modified the introduction to the Macedonia chapter due to the nature of political changes that have drastically altered the media situation since the panel discussion for the Macedonia study was conducted on May 12, 2001. The scores remain reflective of the panel discussion and IREX's May scoring. This revised introduction provides context for how the situation has changed.

Macedonia is a country that is going through a period of massive upheaval. Since February of 2000, Macedonia has been on the brink of civil war. After months of conflict between armed militants of the (ethnic Albanian) National Liberation Army (NLA) and Macedonian Government forces, a political settlement was struck. The deal, known as the Framework Agreement, was brokered by diplomats from the United States and the European Union and was signed in Ohrid on 13 August 2000 by leaders of the country's four main political parties. At time of writing that deal, and its concomitant constitutional amendments, have still not been ratified formally in parliament. Future armed conflict cannot be ruled out despite a cease-fire which has held (largely) since mid-August 2001.

The conflict has changed, probably forever, the political and social environment in Macedonia. It has also dramatically affected the country's media. This report must be taken in the context of the tremendous changes taking place in Macedonia. The report is largely based on a Focus Group study carried out on May 12, 2001. The report is still very relevant and gives a valuable insight into the media scene in Macedonia. However, since the Focus Group study the media in Macedonia has split on ethnic lines, and the degree to which the conflict has affected the media has increased almost exponentially. While the divergence of the media has stabilized to a degree since the signing of the Framework Agreement, and while there have been a number of initiatives aimed at re-building bridges between the two communities, it is true to say that the Macedonian language media and the Albanian language media report as if they were in two different versions of the same reality.

Media Sustainability Index - FYR Macedonia



** Please see introduction regarding significant changes in Professionalism since May 2001.
The rating above is based on May 2001 Research.*

Scoring System

- 0** = Country does not meet indicator; government or social forces may be actively opposed to its implementation.
1 = Country minimally meets aspects of the indicator; forces may not be actively opposed to its implementation but business environment may not support it and government or profession not fully and actively supporting change.
2 = Country has begun to meet many aspects of indicator but progress may be too recent to judge or still dependent on current government or political forces.
3 = Country meets most aspects of indicator and implementation of indicator has occurred over several years and/or change in government, indicating likely sustainability.
4 = Country meets the aspects of the indicator; has remained intact over multiple changes in government, economic fluctuations, changes in public opinion and/or changing social conventions.

The scores for all indicators are totaled and averaged for each objective.

Each of the objectives can receive a score from 0 to 4:

Above 3: Sustainable and free independent media

2-3: Independent media approaching sustainability

1-2: Significant progress remains to be made; society or government not fully supportive

0-1: Country meets few of indicators and government/society actively opposing changes

At the beginning of the conflict the reaction from the media was encouraging, generally the reporting was fair and balanced from both of the main language groups. There were no obvious attempts to manipulate the conflict for political gain. The government also appeared to be reasonably responsible and fair with regard to the media. This view was echoed by an Organization for Security and Cooperation in Europe (OSCE) report dated March 27, 2001, which “welcomes the restraint and responsibility of the media in Macedonia” in reporting the current conflict. Since then the situation has deteriorated rapidly. At the peak of the conflict in the Summer of 2001, the Skopje-based private Macedonian language TV station Channel 5 broadcast a news report which included a stand-up where a reporter fired a piece of Macedonian artillery toward NLA positions near Kumanovo. The Macedonian Association of Journalists’ (MAJ) “Court of Honor” encouragingly condemned the report, and the reporter apparently realized her “mistake” and was very embarrassed by her report. The Forum of Young Journalists however, criticized the MAJ for criticizing Channel 5.

There have been many serious cases of misconduct on the Albanian media side as well. A report broadcast by the Tetovo-based Albanian language TV Station TV ART showed NLA fighters parading, followed by an interview with a local NLA commander. There was no commentary by the journalist. The journalist’s questions were edited out of the interview. TV ART said this was in fear of reprisals (they didn’t specify from whom). The result was a short report that was in essence not a piece of journalism at all, but effectively free air time for the NLA, with no analysis, critique or balance. Again, when challenged TV ART was embarrassed and apologized and appeared to realize the error. Both cases, though, while they can be attributed to naivete and lack of experience highlight the degree to which the conflict has become dangerously personalized amongst working media professionals in Macedonia.

The private, national Macedonian language A1 television has until recently claimed a significant Albanian viewership. The station is generally regarded as the most professional broadcaster in Macedonia. In August 2001 A1 appeared to change its editorial policy. The station had remained reasonably fair and balanced, and run interviews for example with the leader of the NLA, Ali Ahmeti. But Aco Kabranov, the Editor in Chief, has been quoted as saying that A1 came under tremendous pressure following the broadcast of such interviews. The broadcasts are generally considered to have shifted away from the “middle ground” to a more “Macedonian” perspective. There have been anecdotal reports from many media outlets that companies have threatened to cut advertising on stations if they continued with reporting they considered “unfavorable”. A similar change toward a more nationalistic, pro-ethnic

Macedonian editorial stance has also been observed in the leading independent daily Macedonian language newspaper, *Dnevnik*.

Since the terrorist attacks on the United States on September 11, the Macedonian media has run a number of stories alleging a direct link between Osama Bin Laden and the NLA. The Albanian media has vehemently denied the truth of such allegations. The independent daily *Dnevnik* and *Fakti* exchanged articles where each paper accused the other of striking a political agenda. Relations between the two papers have seriously deteriorated. This is especially disturbing considering that only in March, *Dnevnik* published an editorial by *Fakti's* editor, Emin Azemi, as an attempt to put across the views of “moderate” Albanians and to calm the situation as it was then.

There have also been initiatives by members of the media, acting partly as individuals and partly as media organizations to play a role in the political process. The two most striking examples are: Members of the Macedonian media, *Dnevnik*, *Zum*, *Vest*, *Nova Makedonia*, *Fokus*, *Vecer*, *Sitel*, *Kanal 5* and *AI*, organized a protest called “Go obravme bostanot”, or “Watermelon Harvest”. It was an attempt at a satirical parody of NATO's “Operation Essential Harvest” (where NATO soldiers collected weaponry from NLA fighters as part of the disarmament process under the current peace agreement). Members of the public were invited to deposit “weapons from their homes”: fruits, vegetables and old plastic toys, in front of the Parliament buildings to protest the NATO mandate and the type of weapons expected to be collected from the NLA.

Dnevnik's editor-in-chief Branko Geroski organized a protest walk to the monastery of Leshok in late August. Leshok had been destroyed in mysterious circumstances during the conflict. A number of people joined the protest at a highly sensitive moment. Forces from Essential Harvest stretched their mandate to “police” the protest and successfully prevented any serious disturbances. If they had not done so it is possible that the event could have triggered a serious and violent incident with far reaching consequences. These activities clearly demonstrate the difficulty which individual journalists, media managers and media personalities are having in separating their professional lives and professional responsibilities from their own feelings and emotions during these troubled times.

The fighting in the hills above Tetovo resulted in a number of private Albanian- and Macedonian-language broadcast transmitters being damaged; they were unable to broadcast effectively during the conflict. The consensus is that the damage to the transmitters was a consequence of the fighting and not necessarily a result of direct targeting by either side to prevent transmission by private broadcasters. The truth will probably never be known. The international community has paid for replacement transmitters to be installed in Tetovo.

A consequence of the conflict was the government's reopening of the debate over the founding of MRTV3, a proposed third channel of Macedonian State Television devoted to minority language broadcasting, with a heavy bias towards the Albanian language. The issue was raised in Prime Minister Georgievski's televised address to the nation at the beginning of the conflict as a means of satisfying one of the demands of Albanian population and the NLA. It is not yet clear whether the channel will start broadcasting.

Two other developments deserve mention: a law on public information, and the wiretapping scandal. The government unexpectedly tried to force through a draft law in early February 2001. It was potentially a very serious restriction on the freedom of media, including for example a government-run registration of journalists without which they would not be able to work. Following a vigorous campaign by international and local NGOs and local media, the law was withdrawn, but the government is still planning, supposedly as part of its ratification with the European Union, to introduce a Law on Public Information.

The wiretapping scandal broke out in early February, and involved allegations by the opposition that the government Interior Ministry tapped telephone conversations of leading journalists, opposition politicians, and foreign diplomats. The conflict has taken the wiretapping scandal out of the headlines and also forced the four major political parties to work together in a “coalition government of national unity,” which is likely to last until the next elections. However the scandal highlighted violations of fundamental rights and freedoms of journalists (and politicians). There is no reason to expect that such practices have stopped or may not occur again. No instruments to prevent a repetition of such violations have been put in place. A number of journalists have filed lawsuits against the Interior Ministry over the alleged wiretapping.

Attribute #1: Legal and social norms protect and promote free speech and access to public information

Indicators
1. Legal/social protections of free speech exist and are enforced
2. Licensing of broadcast media is fair, competitive, and apolitical
3. Market entry and tax structure for media are fair and comparable to other industries
4. Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare
5. State or public media do not receive preferential legal treatment, and law guarantees editorial independence
6. Libel is a civil law issue, public officials are held to higher standards, offended party must prove falsity and malice
7. Public information is easily accessible; right of access to information is equally enforced for all media and journalists
8. Media outlets have unrestricted access to information; this is equally enforced for all media and journalists
9. Entry into journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists

Article 16 of the Macedonian constitution guarantees the freedom of speech. The most recent attempt to pass a law on public information was in February 2001, but it failed under subsequent local and international pressure. It was a draconian law and would have seriously inhibited freedom of speech. The government still plans to introduce such a law, which it argues is required as part of the process of ratification with the European Union. There are some attempts to make the process of drafting the next law more transparent, and to consult with local and international legal and media experts.

The MSI panel had mixed opinions about the degree of freedom of speech in Macedonia. The lawyer on the panel said legal protections for free speech exist now, but had also existed in the old socialist system. He mentioned that socialist-era laws still on the books overlap with laws introduced since 1991 and create confusion. For example, when the Law on Broadcasting was introduced in 1997, some broadcasters had licenses under the old system and some under the new. He thought that proper implementation of current laws and the constitution would sufficiently enhance the protection of free speech. The majority of the panel disagreed with the lawyer. They said that, had the law been implemented, it would have seriously impeded free speech in Macedonia: “Any new Law on Freedom of Speech will be misused, i.e. it will restrict freedom. Anyone who comes to power will try to abuse this type of law.” The panel majority also stated that Macedonia lacked legal protection of free speech, and what protection does exist is threatened.

While the panel majority felt there was a need to enhance the legal protection of free speech, one participant (a TV journalist) said that the passage of any additional laws would most likely result in further restrictions on freedom of speech. Members of the international community on the panel stated very clearly the strong need for a law regulating the access to information in Macedonia. The OSCE representative emphasized that such a law would oblige the government to make information available to the public and the media. “One of the reasons why we need such a law is the confusion regarding the obligations of the state. When the obligations of the state are known, there will be some restrictions.” The panelists agreed that there are relatively few examples of violations of freedom of speech. While legal protection exists to a degree, the inefficiency of the courts (a recurring theme) means that these laws were not effectively implemented. In the rare instance of a journalist being prosecuted, the court process takes too long to have any real effect; therefore the journalist is not sentenced. However, the panelists

agreed that when prosecutions involving free speech occur, they are usually an attempt to threaten or intimidate journalists, or a cynical attempt to seek publicity.

The licensing of broadcast media is neither fair nor apolitical. The governing body in charge of licensing, the Broadcast Council, is influenced by the government of the day. Despite the fact that the terms of the members of the council are staggered, and appointments are made by the parliament, in reality the body acts largely to please the government. Furthermore, its final recommendations for licensing must be approved by the government's Ministry of Telecommunications. One possible instance of political manipulation concerns the public service announcement fee. The Broadcast Council "gives" 10 percent of the broadcast licensing fee to private broadcasters in return for public service programming. In the most recent allocation of the 10-percent licensing fee, the government for the first time changed the list of recipients recommended by the Broadcast Council. Because the system is not transparent it is hard to discover how recipients qualified, but there is a clear sense in the media community that the government favored those outlets least critical of its policies.

The panel agreed that some broadcast licenses are granted for political reasons. The participants stressed that the procedure itself, as formulated in the law, does not provide a fair and transparent legal process. "When it comes to issuing licenses to the Albanian language media, closeness to the Albanian political parties is the most important thing. Panelists stressed that the major reason behind irregularities in the granting of concessions is corruption (bribery). The panel also believed that the president of the Broadcast Council had too much power (the president is elected by parliament for a seven-year term.)

Private media are taxed in the same way as other private businesses. But they do receive some funds from the government in a manner that is neither transparent nor well regulated, and that allows political manipulation. The Broadcast Council "gives" 10 percent of the license fee to private broadcasters in return for public service programming. As stipulated by the broadcast law, each broadcaster proposes public service programs, which are then vetted by the Broadcast Council. Then, a list of successful applicants is prepared with a recommended payment for government approval. The programming is generally educational and cultural material. As seen in November 2000, the current law allows the current government to change the proportion of the 10-percent tax that each broadcaster receives, and to change the list itself. The print media receive funds from the state budget via the government's Agency of Information under an old socialist law. The decisions come directly from the government: the Agency of Information, along with the Finance Ministry, merely administers the distribution of funds. Discussion on market entry and tax structure was brief, with all panelists agreeing that the media are not singled out in any particular way through taxation and business regulations. They agreed that market entry and the tax structure was fair compared to other industries.

In the past year there have been some physical attacks on journalists, particularly during the local elections in November 2000, and during the more recent clashes with the NLA. The attacks "allegedly" were politically motivated. In November of 2000 a local radio journalist in Kocani was attacked for broadcasting an opposition Social Democratic Alliance of Macedonia (SDSM) announcement. There was no official investigation of the incident. In the same period in Strumica a transmitter belonging to the privately owned TVVIS was destroyed; again the allegation is that this was the work of government sympathizers, though there has never been any proof. In the March conflict with the NLA in Tetovo, a journalist from privately owned A1TV was roughed up at a demonstration. These incidents were not vigorously investigated. Furthermore, the recent allegations that journalists were wiretapped by the Interior Ministry have not been resolved. The panel agreed that there are attacks against journalists, but these attacks do not occur frequently, especially not physical attacks. Verbal attacks and condemnation or criticism by politicians are much more frequent, and the public and the media community generally condemn these attacks. However most panelists agreed that subtle, hidden pressures are brought to bear against journalists.

Public media are state-owned, with senior management appointed by parliament. This leads to direct political appointment of the general managers of Macedonian Radio and Television (MRTV) and the state newspapers. Journalistic qualifications are not a major factor in the appointments, though to date all the appointees have had some journalism experience. MRTV is a government mouthpiece, with the Albanian-language component being a mouthpiece of whichever Albanian party is in the current governing coalition. The panel agreed that the law does not specifically give advantages to state and public media over private media when it comes to access to information. However, the panel agreed that the interpretation of laws has at times favored the state media. Some participants stressed that local authorities control local public-media outlets even more than government controls state media. The member from the OSCE stressed that the legal transformation of MRTV from a state to public service broadcaster is not yet completed; the panel agreed.

Libel in Macedonia falls under the criminal code, but journalists are rarely prosecuted for libel. The panel agreed that current libel laws are largely ineffective. Few cases are prosecuted and when fines are given they are not overly punitive. The court procedure in Macedonia is inefficient and slow and nobody takes being sued particularly seriously. Yellow journalism is a problem in Macedonia. For example, recent allegations were published in *Vest* newspaper of smuggling activity by the head of the EU in Macedonia, Mr. Texeira: no hard evidence or reliable source was given for the allegations. In the criminal code public figures are responsible for their actions, but in reality they usually go unpunished, or simply lose their political position. There are no documented cases of corruptions of judges or prosecutors dealing with libel.

Access to public information is a problem. State media have easier access than private media. There are no clear definitions of what constitutes a state secret or public information. Attempts are made to address this in the draft Law on Public Information. At the local and national levels the culture of government is not to release or make available even the most innocuous information (such as tendering for municipal projects, tax revenue, etc). State and public institutions are very closed and centralized; requesting information is a lengthy and difficult process. Discussion on access to information was animated. The panel agreed that there was no real discrimination between public and private media in terms of access to information. Public officials, they claimed, are utterly unaware of their responsibility to provide information. "Most of the politicians that I know are not aware of their obligation to share information with the public. Perhaps only 10 percent of the politicians that I know think differently."

The panelists agreed there were no specific legal restrictions on access to information, but that the authorities were not obliged to make public information available to the media and citizens in general. They commented suggested that the overall tendency of Macedonian society and officials at all levels was to resist giving access to information. Although there is a procedure to obtain official information, it is slow and difficult. Interestingly, the panel felt that journalists were not singled out for denial of access to information due to the nature of their profession, but that they were treated "as badly" as anyone else seeking information.

Access to international news and sources is currently unrestricted. Internet access is relatively cheap and easy to obtain. Journalists can use international news and Internet information as sources, but they rarely do. The last draft of the law on public information, however, included a provision for a government body to grant licenses to journalists, both local and international, which would have imposed significant restrictions on the ability of international journalists to work in Macedonia. Concerning access to international news and sources, the panel could not point out any state-imposed limitations. The only barrier mentioned here was cost, though generally people felt that access to the Internet was cheap enough. Satellite TV was also considered cheap enough, and largely unrestricted. Rebroadcasting of foreign programs is allowed. It was mentioned that international newspapers are expensive and therefore largely unavailable, but this was seen as a result of their market value and the weak Macedonian economy.

All the panelists agreed that, to date, there are no limitations on entry into the journalism profession. On the contrary, as a result of the large number of media outlets and the high demand for journalists, it is relatively easy to become a journalist in Macedonia. However, the quality of journalists and journalism remains low. In February the government tried unsuccessfully to introduce a law on public information with provisions to allow the state Agency of Information to issue journalists' licenses, without which they would not be able to work. The group expressed fear that some elements in the government still hope to introduce similar restrictions.

Attribute #2: Journalism meets professional standards of quality

Indicators
1. Reporting is fair, objective, and well sourced
2. Journalists follow recognized and accepted ethical standards
3. Journalists and editors do not practice self-censorship
4. Journalists cover key events and issues
5. Pay levels for journalists and other media professionals are sufficiently high to discourage corruption
6. Entertainment programming does not eclipse news and information programming
7. Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient
8. Quality niche reporting and programming exists (investigative, economics/business, local, political)

Generally, journalism in Macedonia is not very sophisticated. Professional standards are poor. Journalism tends to be fair, although there are incidences of bias. Political reporting is often one-sided and subjective, with no clear separation between news and commentary. Journalism is, on the whole, poorly researched and sourced. This is largely caused by the lack of professionalism and training among journalists, and the political polarization of most outlets.

The panel agreed that quality of reporting varied widely, ranging from reasonably fair, objective, and well sourced to very poor and biased. Much depended on the media outlet and its particular political/business affiliation. Some in the panel argued that the main problem in sourcing stories and quoting sources was the unwillingness of sources to be named. Panelists agreed that generally, private media are more objective than the state-owned, and stressed the importance of media plurality in Macedonia in providing objectivity. They argued that the huge number of media outlets, and their variety of political and business affiliations, meant that the discerning viewer or reader could get an objective view.

A journalists' code of ethics, prepared by the socialist Journalists Association, does exist in Macedonia, but the panel unanimously agreed that it is largely worthless and ignored. There are encouraging moves on the rebirth of the Association, which has spoken out against unethical standards, and which has plans to draft a new code. Most participants agreed that there are examples of journalists accepting cash or goods in return for amending the editorial line of their work. But they felt that, on the whole, the acceptance of bribes by journalists is rare.

Self-censorship is a problem, and most of the panel agreed that it is a very serious one, especially in the state media. The consensus is that in state-owned media, journalists and editors closely follow the editorial view of the political party controlling that sector of state media. In private media the motivation for self-censorship was largely economic. As a panelist said, "From outside it seems that there is more censorship in state media, but there is censorship in private media: it is simply more sophisticated." For example, private media won't criticize a company that supports them or advertises in them. There are no written rules dictating editorial policy in either state or private media, but the rules are well known all the same. Journalists and editors rarely admit to self-censorship, but it is anecdotally reported in the journalism community. However, the panel believed that the plurality of Macedonia's media allows a journalist who feels censored in one outlet to seek alternative outlets for his/her journalism. Some also said that if a story were powerful enough, most private media would carry the story despite any conflicting editorial policy.

The panel quickly agreed that, in general, media cover key events. The only barriers to major events and issues are the economic weakness of individual outlets. The discussion then focused on the current political and military conflicts in the region. The panel agreed that major events were covered, but unlike foreign and international media, local media could not afford to send correspondents and reporters to all the scenes of conflict. Panelists agreed that “Whether events are covered depends on money, on the financial power of the media outlet and not on its ethnic or other background.” The panelists condemned the quality of reporting by Western media during the current political/military crisis.

The average salary for journalists is 300 German marks per month, which is roughly comparable to the national average. (National pensions vary from DM200 to DM600 per month.) Few journalists are well paid in the print or broadcast media. Obviously, the bigger and more successful outlets pay best and attract the best journalists. Panelists agreed that incomes are generally not high enough to prevent corruption. There is significant variance between pay in the regions and pay in Skopje (the capital), with the latter being higher. More serious, perhaps, is the variance between the country’s minorities: Albanian language outlets usually pay less than Macedonian ones, and private Roma outlets pay even less. (The independent daily *Dnevnik* has occasionally employed a small number—less than 5—of Albanian journalists, but no longer does so. There are no official restrictions on employment of minorities but social pressure acts as a barrier.)

In broadcast media, entertainment programming does to a degree eclipse news and information programming, not so much by taking time away from news, but by disrupting news broadcasts with advertisements and promotions. This is largely a result of many broadcasters in Macedonia not being serious media businesses with serious programming. More serious outlets do focus sufficiently on news programming (for example A1TV, TVSite1, and Kanal 77 radios). News and information programming are not neglected; in fact some panelists felt that they dominate the rest of programming, during the current crisis in the region.

Most of the broadcast media in Macedonia are poorly equipped, inhibiting effective newsgathering and production. There is a tendency to complain of a lack of modern digital equipment, lack of cameras etc., but much could be done to make a better use of existing equipment and resources. The panel felt that generally the electronic media are poorly equipped, though there are notable exceptions such as A1 television. The print media are viewed more favorably, though print media journalists claimed serious problems with printing and distribution. There was a call for resolving the problems in print distribution with the formation of a united distribution system. Currently, rival private distributors disseminate the same publications on the same routes to the same destinations, while competing with the large state distribution system.

The panel member from the Roma community (TV Sutel) said that small, private, local media serving the minority communities (specifically Roma) face the biggest financial challenges. He also said that the local TV stations were very poorly equipped, and that this is a barrier to the production and gathering of news and information.

The panel quickly agreed that niche reporting, in particular investigative reporting, is virtually non-existent as few media can afford the luxury of effective investigative reporting (though A1TV, *Dnevnik*, and some of the bigger outlets have some journalists specializing in economics and politics). There are some specialist magazines: *Kapital* is a weekly economics and politics magazine. There is no formal training in specialized fields for journalists, apart from what is provided by international donors. The panel said the major causes were lack of personnel and funds.

Attribute #3: Multiple news sources provide citizens with reliable and objective news

Indicators
1. Plurality of public and private news sources (e.g. print, broadcast, Internet) exist and are affordable
2. Citizens' access to domestic or international media is not restricted
3. State or public media reflect the views of the entire political spectrum, are non-partisan, and serve the public interest
4. Independent news agencies gather and distribute news for print and broadcast media
5. Independent broadcast media produce their own news programs
6. Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates
7. A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources

There are plenty of news sources for Macedonia's population of two million, with approximately 30 public and 111 private broadcasters. There are 11 daily newspapers and 21 weekly publications, and 20 monthly and periodical publications. The license fee is relatively high (at DM7 per month it is about 3 times higher than in Britain for example, relative to yearly incomes), but access to television and radio is not seriously affected. Television is still the primary news source in the country, because televisions (and radios) are cheap and common, and many people (40 percent of the population) do not pay their license fee. Printed publications are relatively cheap with most papers sold for 10 denars (the price has dropped from 1995 when a paper cost 30 denars). The panel unanimously stated that at current prices newspapers are affordable. They also agreed that, similar to (and no worse than) most Western countries, rural populations were not major consumers of newspapers and printed media in general. Panelists thought that both print and electronic media focus on urban populations.

Access to international satellite and Internet news is not restricted. Internet access is readily available in Internet cafes across the country and in some libraries and secondary schools. Internet access is not prohibitively expensive and one company has recently started a pre-paid card service, at about US\$16 per month. The use of the Internet is also concentrated in the cities, but some small towns or villages that have Internet cafés. Some panelists commented that the cost of Internet access is high for the average citizen.

Access to international publications is not restricted, though they are relatively expensive and largely unavailable outside of Skopje. All panelists agreed that there are no significant restrictions of access to domestic or international media. The biggest obstacle for purchasing foreign newspapers is their market price, which, due to the poor economy, is too high for the average Macedonian. "A foreign newspaper, for example the *Financial Times*, costs DM6, and a domestic newspaper costs one third of a deutsche mark," said one panelist.

However, one of the participants said an old law from the socialist era still applies to the import of newspapers, and under it the Ministry of Interior issues licenses for the import of newspapers. In the past ten years, this law has been used twice to block the import of newspapers: once from Bulgaria and once from Albania. The lawyer on the panel stressed that according to Macedonia's criminal law, no one has the right to prevent the free distribution of newspapers.

State news outlets, print and broadcast equally, are considered to be a mouthpiece of the government coalition. Influence is achieved through sidelining editors and journalists who do not follow the editorial line dictated by the government-appointed management. The panel unanimously stated that state media are anything but non-partisan and do not serve the public interest. Some panelists also strongly criticized the quality of cultural programming in the state-owned media, saying that private media do a better job. There are only two news agencies in Macedonia, the state-owned Macedonian Information Agency (MIA) and the private MAKFAX agency. Both gather and distribute news to their paid subscribers from the broadcast and print media. Services are affordable and used by the media. The panel agreed that

MAKFAX is fairly reliable and sensibly priced, and they expressed regret that there was only one private agency. The state-owned agency is viewed as a mouthpiece of the government.

Independent broadcast media produce their own news programs. The quality of reporting is not very high but information is disseminated. There are a number of private stations that broadcast nation-wide: two TV stations, —A1 TV and TV Sitel, and two radio stations, Kanal 77 and Antennae 5. The panel noted that under Macedonia's broadcast law and licensing system, broadcasters have a clear obligation to produce their own news programs.

The panel stressed the huge difference between the quality of news programs when comparing public and private media. Generally, private media produce better and more independent news. However, they were criticized for being influenced by “big businesses” and the political affiliations of media owners. In addition, the majority of the panel agreed that few private media outlets are truly independent. There is little or no transparency of media ownership; however, the public is reasonably well informed about the political leanings and affiliations of broadcasters and publications, and is able to judge the information accordingly. Media ownership is not concentrated in a few conglomerates, but big companies own the strongest and most developed media. A1 TV is owned by UNIPROCOM (a Macedonian trading company), TV Sitel is owned by SILEKS (a Macedonian mining and trading consortium), and MakPetrol owns TV Telma. The panel agreed that there is no great secrecy over the ownership of private media. Foreign and domestic panelists disagreed somewhat regarding whether and to what extent media owners interfere in editorial policy. The domestic participants gave examples of owners who do not interfere in editorial policy. The foreign nationals were clearly not convinced.

A relatively broad spectrum of social interests are reflected and presented in both private and public media as a consequence of the large number of publications and media outlets. State-run TV, radio, and print cater to a limited degree to minority needs. There is a fair number of private minority language media, but their quality and facilities are poor. However, the panel agreed that Macedonia's media are divided along ethnic lines. Individual media only focus on their own ethnic group's social issues. Albanians who work in private Macedonian media can be counted on one hand, as can Macedonians working in Albanian media. This is considered to be more a social issue than a consequence of editorial or managerial policy. The lawyer in the panel described language in the media as “self-limiting,” meaning that by sticking to just one ethnic group's language, the individual outlets were limiting their outreach in the Macedonian market.

The panel said that journalists generally resist any efforts to prevent the coverage of particular social interests. But the participants also said that businesses or organizations avoided buying time or space for advertising if they were not in favor of an outlet's content. During the current crisis Albanian broadcasters have lost a great deal of advertising, which they claim is the result of their ethnicity and program content, rather than economic conditions.

The panel agreed that there were no legal barriers to starting and running any media in the language of any particular ethnic group, but it agreed that the financial barriers for the smaller ethnic groups were significant. The equipment and production levels of Roma media are generally of lower quality than other outlets. The journalist from the Roma Sutel TV stressed that the Roma journalists are more frequently asked for accreditation at media events than the other journalists, adding that the Roma media are often not invited to attend press conferences by the major political parties. He saw this as clear discrimination against Roma media.

The panel also agreed that news bulletins provided by state broadcasting in the Roma, Vlach, and Serb languages are effectively unavailable for the majority of their target audience, because they are disseminated only once at midday.

Attribute #4: Independent media are well-managed businesses, allowing editorial independence

Indicators
1. Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses
2. Media receive revenue from a multitude of sources
3. Advertising agencies and related industries support an advertising market
4. Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets
5. Independent media do not receive government subsidies
6. Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences
7. Broadcast ratings and circulation figures are reliably and independently produced

Distribution and printing firms are struggling to be profitable and are not efficient. In distribution there are too many rival firms for such a small and unsophisticated market. The state distribution system of *Nova Makedonia* is the best, but even it is being run inefficiently. The government is in the process of privatizing *Nova Makedonia*. The relatively low cost of newspapers and magazines and the weak advertising market makes it hard for publishers to meet their overheads, a large chunk of which is taken up by printing costs. Most of the panelists agreed that newspaper printing costs are too high, though others argued that the price of newspapers is too low to allow profitability. While there are enough printing houses, many are not profitable and this is linked to the low price of publications and the immaturity of the advertising market: “The printing houses are profitable, which does not mean that media outlets in general are profitable.”

The media market in Macedonia is unsophisticated and undeveloped. Media receive revenue mainly from advertising, direct sales, political or business patronage, international NGO support, and government support. All panelists agreed that for the private media, although there are a wide variety of sources of funding, the majority of revenue was received from advertising. The panel thought that there was actually too much dependence on advertising, and noted the small number of advertisers. As a result of the direct contact with political parties and the business sector, advertising revenue usually goes to the highest bidder from the media. In deciding where to place advertisements, businesses often base their choice on a media’s political affiliation, rather than on sound market research.

There are only a few professional advertising agencies, but the number of advertisers is also small. A few panelists stressed that the collection of payments for ads is a common problem (exacerbated during the current crisis). Several panelists observed that advertisers are pulling out of Macedonia in general, and some suggested again that local advertisers are withdrawing business as a result of increased ethnic divisions within society. The representative of TV Sutel said that regardless of the current situation his TV station has persistently found it very difficult to attract any advertising as a result of his station’s ethnicity.

The panel agreed that private media receive funds from the government: the broadcast media via the 10-percent broadcast tax “rebate” for public information programming, and the print media via a direct subsidy from the state budget. The amounts given in both cases can be significant. The panel was unanimous that in both cases, the process by which media are selected to receive funds and in what amount is both flawed and nontransparent.

Market research is used in some of the bigger outlets, but its use is not widespread and the information, the panel stressed, is not trustworthy. The companies appear reliable but the surveys are not sophisticated or representative enough to yield good results. Circulation figures are neither reliable nor politically independent. A number of publishers (state and private) release their own figures for distribution, and these by their own admission are not accurate. There was a general feeling on the panel that the lack of sophistication of the advertising market meant that research was largely unnecessary. However, it was mentioned that the leading private television broadcaster in Macedonia, A1, does carry out its own research.

The panel spoke positively of the market research group Strategic Marketing and the Institute for Sociological and Juridical research in Skopje. But confidence in collected data is quite low. Research is carried out on an ad hoc basis with little or no cooperation between media outlets and the research agencies. The panel did not suggest that there was any direct government influence on the quality or type of research carried out.

Attribute #5: Supporting institutions function in the professional interests of independent media

Indicators
1. Trade associations represent the interests of private media owners and provide member services
2. Professional associations work to protect journalists' rights
3. NGOs support free speech and independent media
4. Quality journalism degree programs exist providing substantial practical experience
5. Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills
6. Sources of newsprint and printing facilities are in private hands, apolitical, and not restricted
7. Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted

Trade associations do not yet fully represent the interests of private media owners, although positive developments are taking place within some trade associations. The Macedonian Institute for the Media (MIM) recently opened officially (April 2001) with a very clear mandate and a transparent structure. MIM, a multiethnic organization, is a center for mid-career media training, and hopes to coordinate donor activity in the country. There are other encouraging associations: the Lawyers Network under the Media Center is in the process of registering. The Ecological Press Center is actively promoting environmental journalism. However, there is no effective apolitical association of journalists working for journalists' rights and the improvement of journalistic standards.

There are three broadcast associations in Macedonia, and recently (early 2001) an association of publishers was also established. While the panel agreed there seemed to be some positive developments, generally it was felt that the associations are inactive and unrepresentative. There was some disagreement here, with the foreign nationals stressing recent improvements in the broadcast associations and the Association of Publishers. The Association of Private Broadcasters was specifically praised for its strike action (December 2000 and January 2001) as part of a campaign to lower the cost of concession fees, as well as their lobbying work against pirate broadcasters.

The panel was scathing in its condemnation of professional associations: The main reason given for the failure of these associations was the lack of professional awareness and a tradition of poor organization amongst Macedonian journalists. However, note that subsequent to this panel discussion, the Association of Journalists has begun a process of reform with a new leadership and a new "action plan" that includes drafting a new code of ethics for journalists. The panel was critical of NGOs lack of support for free speech and independent media, saying that there were few organizations active in this field. NGOs that exist are concentrated in Skopje.

No quality journalism degree program presently exists. However the Journalism Faculty at St Cyril and Methodius University in Skopje is in the process of reforming its curriculum. Currently the teaching has no practical component, and is more a study in social sciences and Macedonian law than a journalism course. The subject of quality journalism degree programs provoked some amusement. Panelists, especially foreign nationals, pointed to the lack of a coherent and long-term approach to journalism education. The quality of internationally funded training programs was criticized for being ad hoc and uncoordinated. The recent establishment of the Macedonian Institute for the Media as a center for mid-career training coordination was seen as a positive step. Some of the panelists from the print media stressed that they do carry out their own in-house training (i.e. the private daily *Dnevnik*). Others said that there was training in niche reporting (the weekly economics magazine *Kapital* claimed to hire economics graduates and train them in journalism).

Specific problems for some ethnic groups were mentioned: the non-codification of the Roma language was cited as a problem for Roma media and journalists. Linguistic differences between the Turkish language spoken by the Turks of Macedonia and the modern Turkish language spoken in Turkey were also cited as a problem for the Turkish minority of Macedonia. Short-term training and in-service training institutions are almost entirely lacking in local media. Mainly international donors organize these. The only obvious restrictions to sources of newsprint are financial ones—whether the publication can afford to pay for its paper. There is a reasonable variety of printing facilities available, including some over the border in Greece, Bulgaria, and Serbia. All panelists agreed that there were no government-imposed restrictions on sources of newsprint and printing facilities. The state-owned printing house of *Nova Makedonija* prints a number of privately owned publications. However, the owners of private printing houses are selective in regard to which publications they will print.

The state-owned media owns and controls the biggest distribution network and the best and largest number of kiosks. The state-owned Nova Makedonija (NIP) dominates access to kiosks, which is in an almost permanent state of “being privatized”. However there are two private nationwide distributors (Krug and Mozaic) and a few small private distributors in Skopje. Current problems with distribution are largely due to the lack of economic viability in such a small and undeveloped market. The inefficiencies in the distribution market do act as a barrier to free and fair distribution of some publications, especially the smaller ones, and this is a barrier to “democratic independent consumer choice” (especially outside Skopje).

List of panel participants

1. Emica Niami Nalbantic, journalist at A1 TV, correspondent from Sarajevo
2. Ljupco Zikov, Editor-in-Chief *Kapital* weekly
3. Ignat Pancevski, lawyer, worked in the Macedonian state media sector; works on media cases
4. Sroyanka Mitrevska, City Editor at daily *Dnevnik*
5. Harold Schenker, member of the OSCE mission in Macedonia for the last three years
6. Iso Rusi, Editor-in-Chief of the political weekly *Lobi*, contributor to the War and Peace Institute
7. Nezet Mustafa, Owner of the local TV station in the Roma language Shutel, Mayor of the Skopje municipality Shuto Orizari
8. Victoria Ayer, Country Representative, National Democratic Institute (NDI)
9. Zerijeta Jajaga, journalist at the Albanian section of the Macedonian National Television; contributes to Radio Free Europe/Radio Liberty
10. Leila Sabit, reporter for the daily *Vest*

Panel moderator

Klime Babunski

Observer

Kathy Stermer, USAID Democracy Officer