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# MACEDONIA

Early parliamentary elections were held in April, resulting in another win for the incumbent coalition of VMRO-DPMNE and DUI political parties. The opposition accused the ruling parties of serious abuses of the electoral process and decided to boycott the parliament—a boycott still in effect at the time this MSI study was written. Incumbent President Gjorge Ivanov won the presidential elections held in April as well.

Macedonia again retained its status of candidate for EU membership, but endured the most critical European Commission Progress Report to date. The report highlighted many serious issues that the country must address to start membership negotiations, including problems related to the freedom of expression and media freedoms—especially the government’s efforts to establish control over the leading national broadcasters, and the independence of the judiciary. The longstanding dispute with EU-member Greece over Macedonia’s name remains unresolved.

The economy, after a prolonged period of crisis, is now growing at a rate of 3.5 percent per year and Macedonia reported the second highest GDP growth in Europe after Ireland. However, in view of the low starting levels, experts say that the current and projected growth rate is not enough to improve significantly standards of living, and the unemployment rate stands at 27.9 percent. Foreign investments grew, thanks to tax relief and subsidy programs, but companies that have established production in Macedonia have failed so far to deliver the expected higher salaries, better protection of labor rights, or local advertising that would benefit media.

New media legislation—the Law on Media and the Law on Audio and Audiovisual Media Services—came into force at the start of the year. The latter has already been amended several times, introducing provisions that could offer new opportunities to channel state funds to the pro-government media. There was one short-lived attempt to start a new daily, Politiko, with an editorial tone strongly critical of the government, but it failed after only seven issues, reportedly due to abysmal sales and lack of public interest. Finally, a new law that obligates payment of full pension and health insurance benefits on service contracts provoked a huge uproar, led to protests, and is expected to have a huge impact on the media and media professionals.

Macedonia’s long-term prospects for media sustainability are still in doubt, but MSI scores this year improved across the board. Overall the country improved from 1.40 last year to 1.72 this year. Although this is still firmly within the “unsustainable, mixed system” scoring definition, it is a step in the right direction.

# MACEDONIA at a glance

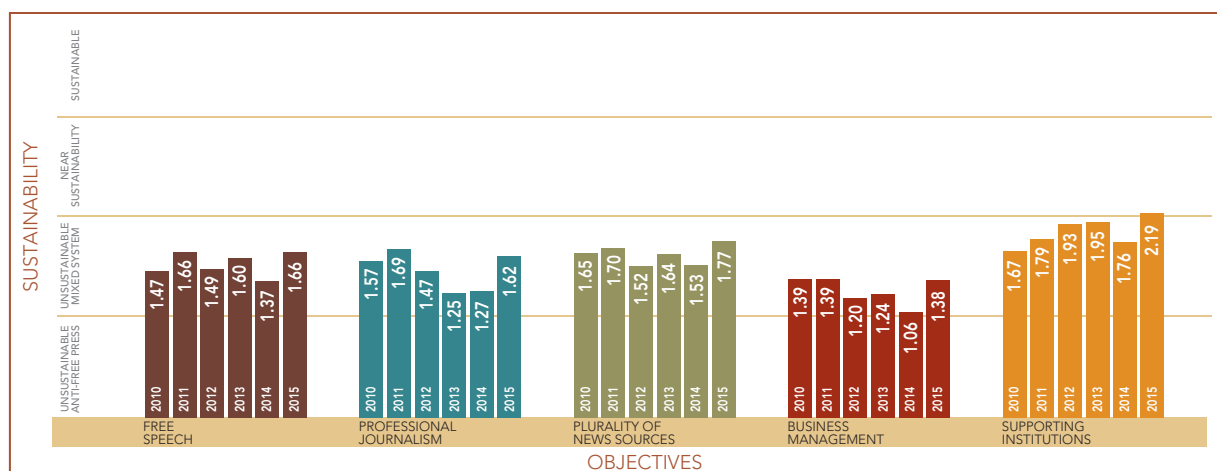
## GENERAL

- > Population: 2,091,719 (July 2014 est. *CIA World Factbook*)
- > Capital city: Skopje
- > Ethnic groups (% of population): Macedonian 64.2%, Albanian 25.2%, Turkish 3.9%, Roma 2.7%, Serb 1.8%, Other 2.2% (2002 Census, *CIA World Factbook*)
- > Religion (% of population): Macedonian Orthodox 64.7%, Muslim 33.3%, other Christian 0.37%, other and unspecified 1.63% (2002 census, *CIA World Factbook*)
- > Languages (% of population): Macedonian 66.5%, Albanian 25.1%, Turkish 3.5%, Roma 1.9%, Serbian 1.2% Other 1.8% (2002 Census, *CIA World Factbook*)
- > GNI (2013-Atlas): \$10.26 billion (World Bank Development Indicators, 2014)
- > GNI per capita (2013-PPP): \$ 11,520 (World Bank Development Indicators, 2014)
- > Literacy rate: 97.4% (male 98.7%, female 96%) (2011 est. *CIA World Factbook*)
- > President or top authority: President Gjorge Ivanov (since May 12, 2009)

## MEDIA-SPECIFIC

- > Number of active print outlets, radio stations, television stations, Internet news portals: Print: 6 dailies (five in Macedonian and one in Albanian), 5 weeklies, 1 bi-weekly, 6 monthlies (AVMS registry); Radio stations: 3 Public Broadcasting Service (MRT) and 78 commercial radio stations (including 3 non-profit community stations affiliated with the 3 state universities) (AVMS registry); Television stations: 3 Public Broadcasting Service (MRT) and 63 commercial; 30+ online news sites (no official registry)
- > Newspaper circulation statistics: Top three by print circulation (data on copies sold is not available): *Vest* (32,000, private), *Dnevnik* (25,000, private), *Sloboden pečat* (13,600, private)
- > Broadcast ratings: Sitel TV (28.6%), Kanal 5 TV (12.8%), MRT1 (6.6%)
- > News agencies: Macedonian Information Agency (MIA)
- > Annual advertising revenue in media sector: €30 million (est., marketing365.mk website)
- > Internet Users: 1.057 million (2009 *CIA World Factbook*)

## MEDIA SUSTAINABILITY INDEX: MACEDONIA



## MEDIA SUSTAINABILITY INDEX 2015: OVERALL AVERAGE SCORES



### CHANGE SINCE 2014

▲ (increase greater than .10) □ (little or no change) ▼ (.10 decrease greater than)

**Unstable, Anti-Free Press (0-1):** Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

**Unstable Mixed System (1-2):** Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

**Near Sustainability (2-3):** Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

**Sustainable (3-4):** Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

Scores for all years may be found online at [http://www.irex.org/system/files/EE\\_msiscorers.xls](http://www.irex.org/system/files/EE_msiscorers.xls)

## OBJECTIVE 1: FREEDOM OF SPEECH

Macedonia Objective Score: 1.66

Macedonian society and its predominantly conservative values are not really conducive to the freedom of expression. The government has little patience for any dissenting or, for that matter, different opinions, with public debate on many important issues being reduced to a bare minimum, usually of a predominantly formal nature. Loyalty to the state and its institutions is considered paramount and is actively encouraged, starting in elementary school civic education textbooks.

On paper, the constitution guarantees and protects the freedom of expression and Macedonia is a signatory to several international treaties and declarations that affirm this freedom. The practical implementation of those legal guarantees, however, leaves much to be desired, and the panelists noted that political and/or economic centers of power, and especially media owners, are able to silence freedom of expression at will. Panelists noted that the ruling party seems to impose its own editorial policies through the appointment of party-sponsored editors and journalists who then act as political commissars. "On paper, everything is all right and in line with Western democratic standards. In reality, however, everything is strictly controlled through

### LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

#### FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets' access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

"We have sent a number of requests for access to information. We do not receive any answers and even when we receive it, the information is so minor and insignificant that we cannot really do anything with it," said Ajdini.

self-control of the media," said Bekim Ajdini, editor and journalist at *Koha* daily.

Panelists noted that the newly adopted media legislation—the Law on Media and the Law on Audio and Audiovisual Media Services entered into force on January 4, 2014—included many weaknesses. For example, the Law on Media excludes online media and bloggers and does not promote self-regulation or pluralist journalism and media. The law does offer provisions on the protection of sources in line with international standards. However, the questionable definitions of "media" and "journalist" in the Law on Media do not ensure that bloggers and journalists working for online media enjoy the right to protect their sources. The panelists pointed to the case of Tomislav Kežarovski, a crime beat reporter who was sentenced to four-and-a-half years in prison for disclosing the identity of a protected witness. Kežarovski, in their opinion, was sentenced primarily because of his refusal to disclose the names of his sources in the prosecution office and among the police that were instrumental in his investigation of abuses of the witness protection program.

In January 2015, the Skopje Court of Appeals reduced Kežarovski's sentence to two years—but ordered him to serve the remainder of his time in prison (he had been serving his sentence under house arrest). He was transported to the Skopje Correctional Facility the same night that the court announced its verdict, only to be temporarily released because of his poor health—leaving the final outcome up in the air.

The new Law on Audio and Audiovisual Media Services provides for two types of broadcasting licenses: licenses to broadcast linear television or radio programs over the digital terrestrial multiplex (a limited public good) for which a public call for applications is mandatory, and licenses for transmission over cable and satellite. The latter are perceived as to be allocated automatically, although applicants need to present the same documents and information to the regulatory authority, the Agency for Audio and Audiovisual Media Services (AVMS). The procedure is legally designed to be impartial and objective. However, suspicions have been voiced publicly that a series of new regional terrestrial



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broadcasting licenses have been allocated in a procedure that was designed so that the frequencies would go to owners close to the ruling VMRO-DPMNE party. At the end of 2014, AVMS announced a public call for renewal of existing licenses. The process was not concluded by the writing of this report, but it will be monitored closely in the coming year.

There is no obligation for licensing of print or online media. However, the new Law on Media requires print media to register with AVMS, which keeps a registry of print media and has powers of administrative supervision and oversight over the work and operations of print media on a limited number of legally prescribed issues. One panelist, a representative of the Association of Privately Owned Media in Macedonia, noted that some form of regulation of online media is necessary to control the current situation in which “very cheaply, one can set up a website, employ people without necessary qualifications and, without any sort of editorial policy, start informing the public.”

Market entry is fair and equal for all interested parties, at least according to what is prescribed by the law. Most new entries in the market are online, although there was a failed attempt to establish a new daily; as mentioned above, the Politiko project, which was expected to be strongly pro-opposition/anti-government, folded after only seven issues, citing extremely low sales. The Law on Media explicitly defines as media only those outlets that are also registered as either a commercial company or as a civil society organization; one or the other is required in order to comply with the national payments system. Tax authorities and other inspectorates apply the same approach and treatment to media outlets as companies in other industries. The panelists, however, would like to see some tax relief put in place to facilitate better functioning of the media. Also, panelists felt, tax authorities and other agencies are likely to provide preferential treatment to pro-government media.

Last year, there were no reported cases of physical assault against media professionals and journalists. Verbal abuse is quite common, though, and the feeling of persecution of critical media and investigative journalists remains. Journalists who chose to raise their voice in protest or publicly expose the pressure, or voice opinions in opposition of government policies, are subject to intensive smear campaigns and outright hate-speech directed against them, with little reaction by the authorities to protect them. The Association of Journalists of Macedonia (AJM) has registered several cases where the authorities prevented journalists from reporting freely at protest rallies and other public gatherings. That lack of institutional protection of their freedom of expression and right to hold opinions results in

great mistrust of government institutions by journalists and the media.

While the legislation provides for editorial independence of the public broadcasting service, Macedonian Radio and Television (MRT), in actuality MRT remains largely a mouthpiece for government policies, as it has been throughout the better part of the last two decades. The government promised, at the time of adoption of the new legislation, that it will propose changes to the Law on Audio and Audiovisual Media Service to ensure full financial and editorial independence of the public broadcasting service within six months from its entry into force—and yet no such changes have been presented to the public. Also, the parliament has yet to appoint the members of the new Programming Council of MRT, the internal body charged with directing programming aspects of the public service broadcaster, in spite of the fact that all legal deadlines have long expired. The legal provisions on the composition of the Programming Council introduce another problem: it now provides fewer representation of diverse social groups and civil society while increasing the number of politically appointed members, which may be another source of political influence over the editorial policies of MRT.

The general perception is that the decriminalization of defamation has failed to achieve its purported goal: to reduce the number of defamation lawsuits filed against journalists and media outlets. Panelists noted that defamation lawsuits are used to put pressure on the media and journalists through the judiciary, which has demonstrated a tendency to apply double standards—with one approach reserved for cases in which high-ranking political and government figures are involved as litigants, and another in cases in which journalists are sued by ordinary citizens—to the extent that the same judge has given opposite verdicts in cases with very similar merits. In that context, the courts also do not apply the principle that public officials should be held to a higher standard, given the public interest for oversight of their work. In a high-profile case involving the head of the Macedonian Administration of Security and Counterintelligence as a plaintiff and *Fokus* weekly magazine, the court ruled against *Fokus* in spite of the fact that the offending portions of the *Fokus* article were clearly the opinions of interviewees. The damages that *Fokus* was ordered to pay presented a serious threat to the magazine, but the weekly eventually managed to raise the funds through a solidarity initiative launched by fellow journalists from the AJM. Another problem is the fact that there is a growing number of defamation action lawsuits filed by journalists against fellow journalists.

The implementation of freedom of information (FOI) legislation continues to be marred by the same problems

reported in previous MSI reports. The holders of public information continue the practice of waiting until the last possible moment before the expiration of the legal deadlines to respond to FOI requests. Also, as noted by the panelists, the information ultimately provided is only in the most general terms related to the actual request. "We have sent a number of requests for access to information. We do not receive any answers and even when we receive it, the information is so minor and insignificant that we cannot really do anything with it," said Ajdini. The legislation on the classification of documents is also abused to deny access to documents that the authorities do not want to see released to the public. Journalists are directed to seek the information they want through the public affairs offices of the relevant institutions, rather than file proper FOI requests.

Panelists noted that critical media face many difficulties in securing information, whether under the provisions of the FOI legislation, or in terms of securing statements or comments from public officials. "The information is given only to the media perceived as fit to publish that information," said Uranija Pirovska from the Helsinki Committee for Human Rights of Macedonia. The negative practice of government and state institutions treating journalists from independent and critical media as somehow "black-listed" continues, and spokespersons and officials do not return their calls or respond to requests for statements or interviews. Also, the practice of so-called "subject specific" press conferences continues, with government officials refusing to respond to questions outside the declared topic to be discussed in the press conference.

There are no legal restrictions to either local or international news and news sources. Quite the contrary, online media, in their coverage of world events, entertainment, show business, or sports, rely on the abundance of online sources. One issue of concern is that only a handful of media outlets—the leading national broadcasters and daily newspapers—can afford to use the services of foreign or international news wire services or agencies. The situation is especially critical in the online media, which are pressed to provide as many daily posts as possible, and sometimes rely on plagiarizing of foreign online news—with near total disregard for copyright laws. One positive development was the initiative, launched by the local Media Development Center, to negotiate and agree on a set of principles for fair use of other media's reporting by online media. The principles have been accepted and endorsed by a dozen or so of the leading online news sites and portals in the country.

Entry into the journalism profession is unrestricted and no licenses or specific qualifications are required for a person to become a journalist. One possible source of problems in that area may be the definition of media in the law, which

excludes online news sites and bloggers. While so far there have not been any situations in which a reporter from an online news site has been prevented from covering an event or an issue on the pretext that s/he was not really working for a media outlet and cannot, therefore, be considered a proper journalist, the danger is that the new law opens up that possibility. Bloggers and citizen reporters are not recognized as proper journalists by the law or by the members of the journalism profession, and the rights of journalists, for example, in terms of protection of sources of information, are not extended to cover their work. The government has repeatedly announced its intent to regulate the online media, and such announcements have met with opposition by journalist associations because they believe it will be done solely in an attempt to place them under government control, too.

## OBJECTIVE 2: PROFESSIONAL JOURNALISM

Macedonia Objective Score: 1.62

The almost total division in the Macedonian media scene into two larger groups of critical and pro-government media continues to prevail. Both sides of this divide have adopted an uncompromising stance and there is little willingness to sit down, discuss, and resolve the many problems that the journalistic profession faces in the current political situation. The situation is especially serious in the pro-government media, where journalists have been pressed or have willingly accepted the role of being an outright mouthpiece of the government. Facts and statistics are tampered with to

### JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

#### PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well-sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption and retain qualified personnel within the media profession.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exist (investigative, economics/business, local, political).

**“We start to focus on the trivial issues. We see the big issues, we see the big story but we pretend that we do not see it. The biggest success of all past governments, including especially this current government, is that people are afraid to write, to say something,” said the representative of the Association of Privately Owned Media.**

conform to propaganda goals, and it is often difficult to make the distinction between pure reporting of facts and presentation of personal opinions of the journalists. It is still possible to get to the core information of issues, but it takes increasingly more effort and consultation of many sources to get all the aspects of a given story: usually, it requires readers to consult at least one pro-government and one critical media outlet to get all the details.

Panelists noted the increasing trend of media publishing unverified information, and it is increasingly difficult to make the distinction between reporting and commentary, which are freely mixed in a single article or story. The media tend to present just one side of the story on any contested, or even uncontested, issue. Headlines, leads, and the choice of consulted experts are all skewed in favor of the preferred political and ideological positions of the given media outlet. Investigative journalism, which has never been a strong point of Macedonian media, has suffered from the prevalent self-censorship, strongly encouraged by the powers that be. On the other hand, the practice of “churnalism” is taking hold, with journalists, especially in online media, increasingly relying on the publication of press releases, wire stories, and other prepackaged material in response to the pressures of time and the need to cut operational costs without any sort of further research or investigation on a given subject. Available evidence, such as news reports and commentaries appearing simultaneously on several news sites, only to be carried later by television newscasts, suggests that for many pro-government media there is an outside editorial office that produces the bulk of what is presented as in-house reporting.

Depending on which side of the existing divide they stand, the media and journalists are usually limited to just one group of sources, usually those that support the position or policy promoted by a given media outlet. Government and state officials often refuse to talk to critical and pro-opposition media, while pro-government media

consult almost exclusively sources in government and state institutions and seem uninterested in independent opinions and the views or positions of officials of the opposition parties. “The pro-opposition and pro-government media, in essence, adhere to the letter of journalism. There is source 1 and source 2, while the two sources can be reduced, in fact, to a single source,” said Ajdini.

While in previous years cases of disregard for the standards of professional journalism were more common on the Internet, this last year the trend has taken hold in the traditional broadcast and print media, too. There is a Code of Ethics, fully in line with international standards, that is not applied by all media. Under the auspices of the newly established Media Ethics Council, talks were started to change and amend the existing Code of Ethics to make it more acceptable across the media landscape. There are no known cases of media that have adopted internal codes of conduct or ethical codes and made them known to the public. On the other hand, the public service broadcaster MRT has not yet fulfilled its obligation to adopt and publish its internal code of conduct and professional standards.

The AJM has its own Council of Honor, a body charged with arbitration on reported violations of ethical and professional standards of journalism. It continues to suffer from low visibility and outreach, as well as the fact that it is disregarded and unrecognized outside AJM membership. One positive step in that area, according to the panelists, was the creation of the Media Ethics Council, a self-regulatory body that has initially managed to cross the existing lines of divisions—on political or ethnic grounds—in the media scene. Its Complaints Commission has only been fully functional for the last two months of 2014, and it is too early to make any assessment of the effects of its work. However, it has been evident that it has been a target of serious efforts to undermine and sabotage its work, even by media outlets that supported its creation.

As noted by the panelists, the prevalence of fear has turned self-censorship into a common practice. Journalists and editors fear the loss of their jobs, while media owners fear a loss of advertising revenue in a situation in which the government and state institutions—the so-called “government ads”—dominate the advertising market in Macedonia. Journalists have learned what they can cover and how far they can go in their investigations. “We start to focus on the trivial issues. We see the big issues, we see the big story but we pretend that we do not see it. The biggest success of all past governments, including especially this current government, is that people are afraid to write, to say something,” said the representative of the Association of Privately Owned Media.

The Law on Civil Liability for Defamation has also emerged as an instrument of pressure that pushes the media towards self-censorship. The relatively high damages prescribed by the Law, if awarded, present a serious risk of impoverishing media already on the brink of folding. As a result, as pointed out by several panelists, journalists pause first to consider whether their reporting could expose them to a defamation lawsuit before they decide if they will report on a given issue.

Journalists and media cover the key events and issues. However, most media approach them in a biased and politically motivated manner, and in effect tend to extend coverage only to the events favorable to their political affiliation. They effectively downplay events organized by political entities on the other side of the divide, applying a selective approach to placement of such news reports in the newscasts and on the pages of newspapers. Pro-government media, but also the politically dominated public broadcasting service, has almost fully ignored a series of protest rallies held on a number of issues at the end of 2014. The limited coverage they offer amounts to efforts at political spin to alleviate the effects and downplay the importance of the protests and to engage in smear campaigns against organizers and participants in the protest rallies.

Journalists' salaries, averaging about \$290 per month, are well below the national average salary of approximately \$395. Salaries of senior editorial staff are higher than the average national salary, particularly in broadcast and print media with pro-government editorial policies. National print and broadcast media tend to pay higher salaries than the local or online media. Salaries are especially low in critical and independent media with very limited access to the already limited advertising market, which is dominated by the government's advertising and promotional budgets.

Changes to the labor legislation introduced in 2014 and entering into force at the start of 2015 will mandate that social benefits (pension and health insurance) be charged on service and part-time employment contracts. This will effectively lower salaries further, since media owners are expected to charge pay these taxes on journalists' and reporters' gross salaries. The Independent Trade Union of Journalists and Media Workers has fought the changes to the legislation and has demanded, together with other trade unions, that their implementation be postponed until an acceptable solution is found.

The panelists commented that fewer people are leaving journalism for other jobs, usually in public relations departments in the corporate or the public sector—not because the situation has improved, but because

**“In the effort to secure the widest possible audience, or because of a perceived need to shock or scandalize, even the newscasts increasingly rely on more entertainment. On the other hand, even entertainment talk-shows usually invite politicians as guests,” noted Darko Buldioski, expert in online advertising.**

the economic crisis has resulted in shrinking public relations departments, too, simply leaving more journalists unemployed.

Journalists with full-time employment contracts, on the other hand, live in constant fear that they may lose their jobs. Many journalists work for several media outlets, usually combining work in broadcast or print media with engagement for an online news site, or work for a local broadcaster and also as correspondent for national media, in an effort to boost their earnings. There are also journalists in pro-government media who are expected to contribute to news websites controlled by the government. Media reports, based on findings presented by opposition parties, claim that some editors and journalists, or their close relatives, in high positions in pro-government media are awarded government contracts as compensation for their “services.” Such reports have already led to a number of defamation lawsuits by journalists against fellow journalists.

The trivialization of media content at the expense of serious reporting continued this year. Most media move towards infotainment newscasts and populate the prime-time hours with soap operas and reality shows. “In the effort to secure the widest possible audience, or because of a perceived need to shock or scandalize, even the newscasts increasingly rely on more entertainment. On the other hand, even entertainment talk-shows usually invite politicians as guests,” noted Darko Buldioski, expert in online advertising. Panelists noted cases in which exotic dancers or clairvoyants have been invited and appeared in the central newscasts of one national broadcaster.

During the process of the renewal of broadcasting licenses that was under way at the time this MSI study was being prepared, most national television broadcasters allegedly chose to apply for a change of their licenses to predominantly entertainment general format licenses. There are unconfirmed rumors that several owners of



pro-government national broadcasters would gladly get rid of their information and news programs altogether, but are not allowed to do so by those in power.

The technical capacities of the media are constantly improving, as prices fall for even the highest quality equipment. The situation is somewhat worse in the local media, which continue to rely on older, occasionally outdated equipment. Traditional media are still slow, or unwilling, to fully utilize the opportunities offered by the emergence and rapid development of the Internet and newer technologies. Their websites are mere copies of the content they offer on their traditional platforms. At least one broadcaster has announced plans to move towards an integrated newsroom at the start of 2015, and that process will be monitored. The media are also reluctant to use the services of citizen journalists. Several media outlets, especially on the Internet, make attempts to incorporate user-generated content, but the content is mostly focused on entertainment.

The situation regarding the technical standards for the facilities and offices is far more questionable. As noted by the panelists, the AVMS has changed its rulebook on spatial standards for television broadcasting, relaxing the standards well beyond international standards and European Broadcasting Union regulations. "It is a matter of unfair competition, really. Television stations that have operated for 20 years should have, by now, adapted their studios to meet international standards. Now, they are allowed to air programs in spite of the fact that they do not meet the standards," said Goran Gavrilov, manager of the national radio broadcaster Kanal 77.

Specialized journalism, already a rarity in Macedonia, is on the decline in the traditional media. Traditional media maintain the traditional divisions into departments, but increasingly, the pressure of shrinking newsrooms and the 24-hour news cycle means that everybody is expected to cover any issue he or she is assigned. On the Internet, however, several news websites have appeared that cover information technology, business, and economic affairs. The biggest national broadcasters still produce specialized economic programs, but economic reporting in general continues on a downward path. Entertainment and show business, on the other hand, receive great attention and show strong specialized coverage. For sports coverage, the audiences increasingly turn to specialized regional sports channels. The audiences also see specialized leisure, lifestyle, and other programs and contents on foreign channels available on IPTV or cable networks, or on foreign websites.

### OBJECTIVE 3: PLURALITY OF NEWS

Macedonia Objective Score: 1.77

The Macedonian media landscape is oversaturated with a huge variety of broadcast, print, and online media. In theory, that should provide enough opportunities for citizens to obtain different views and opinions and compare the coverage and the manner of reporting in different media. That multitude of media outlets does not really mean that there is true pluralism of the media. Traditional media are almost completely dominated by pro-government editorial policies, as a result of the active efforts of the ruling parties to establish control over the leading broadcast and print media. Only a handful of traditional media, broadcast and print, offer views and positions that differ from pro-government editorial policies.

The situation is slightly better online, with the Internet emerging as the primary venue for media diversity and pluralism, but there the stratification along political lines is strong and one needs to consult several sites that follow editorial policies of the left and the right sides of the political spectrum to get a somewhat complete picture of reality. However, in spite of its constant expansion, there is still the feeling among the panelists that the Internet is something for the young and the educated, still lagging behind broadcast media in terms of ratings and coverage of the population. "We remain primarily, so to say, a TV nation, and the public still creates its perceptions of reality based

### MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

#### PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens' access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources
- > The media provide news coverage and information about local, national, and international issues.

on television information programs and newscasts, where diversity and variety of reporting is absent. Those that use the Internet, we can say that they have a choice of different sources of information and diverse views and opinions,” Darko Buldioski said.

Social media channels (Facebook remains by far the most popular, with Twitter a distant second) are increasingly used as sources of information or, to be more precise, as a channel to direct people towards important information or news available elsewhere. All media outlets that have online versions offer the option to view their websites on mobile devices. They do not, however, offer other types of mobile news services, like SMS notifications and personalized news services.

There are no legal restrictions on the reception of foreign television; most people actually watch some of the great variety of foreign television programs available on the local cable networks. Foreign newspapers and periodicals are available on the newsstands, mostly from neighboring countries, and there are no restrictions on imports of foreign publications. Urban areas, both smaller towns and bigger cities, enjoy better access to different media than the populations of rural areas, which largely have to rely on over-the-air broadcast media and, to some extent, print media. Cable network operators rarely venture beyond urban centers, which means that rural populations have no access to many local broadcasters that have chosen to broadcast exclusively on cable due to the prohibitive costs of the digital switchover (which took place in June 2013). Falling purchasing power and the emergence of affordable Internet, at least for the majority of the population, have resulted in large numbers of people giving up on buying papers, turning instead to the online versions of their favorite daily newspapers.

The law guarantees the institutional autonomy and independent editorial policy of the public broadcaster, and the government has announced publicly plans to introduce legislative changes to ensure full financial and editorial independence. As noted earlier in this report, although announced for the first half of the year, nothing concrete was proposed as of the time this report was written. The public broadcaster is also legally obligated to present different views from the political and social spectrum. However, its coverage of events strongly reflects the viewpoints of the government and the ruling parties. The activities of the opposition, when reported, are pushed to the back of the newscasts. Activities of the civil society organizations are largely ignored, and whatever coverage there is of their activities is pushed back towards the end of the newscasts.

“We remain primarily, so to say, a TV nation, and the public still creates its perceptions of reality based on television information programs and newscasts, where diversity and variety of reporting is absent. Those that use the Internet, we can say that they have a choice of different sources of information and diverse views and opinions,” Darko Buldioski said.

The public broadcaster offers educational and cultural programming, and the quality of it has improved slightly with the latest program redesign efforts—but it is still far from truly satisfactory. Such programming is also used to promote the conservative positions and policies of the ruling party on a variety of social issues. On the other hand, the public broadcaster increasingly dedicates its prime-time slots to popular sitcoms, drama, and action features, while significantly reducing debate programs and current events shows. The public broadcaster increasingly acts as a competitor to the private commercial media, at the expense of its public interest role.

The primary news agency for the Macedonian media is the state-owned Macedonian Information Agency (MIA), which offers text-based news and photo services. Panelists expressed many reservations about its content. “MIA is not independent; it is a state agency that totally neglects the fact that it is financed from the state budget. At its head is a former member of parliament for the ruling VMRO-DPMNE, which speaks volumes about its impartiality and objectivity. It offers content that originates in governmental offices,” says Sefer Tahiri, professor of journalism at the Southeast European University in Tetovo. Furthermore, it seems that only the pro-government media use MIA’s services.

Other news agencies, like the privately owned Makfax, have transformed into ordinary news websites, while several online operations that designate themselves as online news agencies are de facto news sites (e.g., meta.mk, netpress.com.mk). Only a couple of media outlets use the services of foreign news agencies—most commonly Reuters, AFP and AP—but in the current economic climate such services are increasingly unaffordable. Only a handful of media have the financial resources to pay permanent correspondents stationed abroad, usually in the major capitals of the world and in the neighboring countries.

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The national and regional television broadcasters mostly produce their own news, to the extent that production is allowed by the shrinking newsrooms and limited resources. National dailies and broadcasters have sufficient human resources to produce their own news, and rely on news agencies and online sources for coverage of events abroad. Gavrilov noted that after the start of 2015, news programs are expected to virtually disappear from radio and that his own radio station will seriously reduce its newscasts, thanks to the introduction of an integrated newsroom that will also include the radio's website. Local media, on the other hand, make efforts to provide the local news with far more limited resources, and mostly rely on national news to fill their newscast slots, with exception, to some extent, of those media located in the larger urban centers. The panelists noted that the political parties primarily set the news agenda, and the coverage in privately owned media is very similar to the news coverage offered by the public broadcaster.

The new media and news websites produce their own news and content, and for them the rule that the size of the newsroom dictates the volume of production is also valid. They, however, rely very much on other news sites for republication of news and reports, as well as on news agencies—which they rely on heavily. While plagiarism is still rampant, over the past year several “gentlemen’s agreements” were reached between the leading news sites to use each other’s contents with proper attribution. An initiative led by MDC resulted in the endorsement and acceptance, by about a dozen leading online news sites, of a set of principles for fair use of copyrighted works in their reporting. Panelists noted the problem that online media, especially pro-government portals and websites, increasingly depend on news and reports that seem to originate from a single source and are then distributed around for republication. “You will find the reports, in terms of their textual contents, on important events aired by private broadcasters to be almost identical with the reports aired by the public broadcaster, which I believe is very strange. Even the leads are identical, and that is all the comment I will give in that regard,” said Tahiri.

Media ownership is regulated by Macedonian legislation in line with international standards and with clear limitations in terms of shares of ownership that a single person can own in different media. It aims to prevent unwanted media concentration and it prohibits elected and appointed officials from holding shares of ownership in media outlets. Media ownership, especially for the traditional media, is nominally transparent, although in many cases listed owners act as proxies for what are, *de facto*, media owned by high-ranking officials of political parties. Therefore, after the digital switchover and the introduction of regional

broadcasting licenses, ruling party officials have acquired several local broadcasters that promptly procured new equipment and were issued regional broadcasting licenses.

Transparency of ownership of online media is a cause of concern. Early in 2014, an investigative report by the MediaPedia project found that many online news sites and portals, usually applying pro-government editorial policies, have been acquired by companies registered in tax havens, which makes it almost impossible to determine the true owner. The prevailing fear is that such offshore businesses are used to hide the fact that people very close to the leadership of the ruling party own many news sites.

The media largely neglect the needs of the vulnerable groups in society. Again, the pro-government media’s conservative and family oriented values and editorial policies pay little attention to gender issues or the rights and needs of sexual minorities. Stereotypes are commonplace, as are patriarchal and masculine views that objectify women in an effort to please the public and attract larger audiences. Hate speech in traditional media has almost been eliminated and can be seen in the work of only a handful of columnists and late night talk-show hosts. On the Internet, the situation is quite the opposite, with rampant hate speech and stereotypes present in many online news sites and social networks. “The NGO sector cooperates with several independent media, most of them online and with smaller shares of the audience. On the other hand, they have a more stable editorial policy that adheres to the accepted standards,” said Pirovska.

There are national, regional and local broadcasters that air programs in Albanian, and there are regional and local media in Romani and Bosnian languages. Such media focus their programs on issues of relevance to their respective communities. One notable problem is that, with few exceptions, like nationally broadcasting AlsatM TV, the media have largely neglected their task to nurture social cohesion among different groups, whether those groups and communities are defined along ethnic lines or otherwise. National minorities can freely access foreign programs, usually through cable networks that commonly stock their catalogues with numerous channels that broadcast in the countries of Southeast Europe.

Media with national coverage are focused primarily on national news and their local coverage is focused mostly on Skopje. Local news from townships and municipalities outside the capital has been reduced to the bare minimum. Financial difficulties have forced many media to lay off local correspondents, to the extent that the AJM has demanded legal changes that would introduce an obligation for national coverage media to operate at least six regional

correspondents' offices. It remains to be seen if the newly established regional broadcasters, both radio and television, will manage to fill in the void and start providing quality local news coverage. Local Internet news sites, usually controlled by the respective local administrations, exist in most municipalities. Several independent news sites outside of the capital city have gained prominence, however, but they are seriously underfunded and understaffed.

The media present global and international news and make an extra effort to secure a domestic focal point to the coverage. The bulk of international coverage is supplied by international news agencies.

#### OBJECTIVE 4: BUSINESS MANAGEMENT

Macedonia Objective Score: 1.38

The media sector in Macedonia is financially unsustainable, the result of a combination of factors, including the poor economy, the oversaturated market, the low purchasing power of citizens, the lack of developed managerial and administrative skills, and the lack of viable business models. Only a couple of the biggest national television broadcasters are not constantly on the brink of bankruptcy. Panelists noted that the quality of managerial and administration skills of management play an insignificant role in the level of success or sustainability of individual media, because access to the advertising market and available advertising budgets depends on other external factors, notably the political dictate of the ruling parties. "Regardless of one's managerial skills and the level of organization, it is not about the access to the

#### MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

##### BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

market, but the access to the actual advertising budgets that decides the success. There are small television stations all over Macedonia that report huge earnings, in spite of having limited capacities, and there are well-organized national radio stations that report losses," said Gavrillov.

A large majority of the media, including almost all of the largest privately owned national broadcasters and print media, are actually part of larger entities and cannot be considered the core business for their owners. The owners use them instead to promote their core activities, as a tool to use against competition, and as a bargaining chip in negotiations with authorities when core businesses are under pressure. Last year, there were reports that two national broadcasters were targeted for takeover, but ultimately nothing materialized. In at least one of those cases, the proverbial grapevine has it that the national television station was offered by the owner after his main business venture was the target of a hostile takeover attempt.

Among regional broadcasters, the opposite situation is more common, where broadcasting is the core business and then owners are forced to expand laterally into other activities to ensure some sustainability. At the local level, a majority of the media depend greatly on contributions from local administrations, for which they have to surrender most of their editorial independence.

The majority of Macedonia's traditional media rely on advertising revenue, which, on average, accounts for more than 90 percent of their total revenue with the remaining coming from various sponsorship deals. Panelists have noted that it is only formally so, having in mind the distortions of the market due to the government interference through its promotion and advertising budgets. One panelist, with long experience in print media, noted that some pro-government print media actually finance their operations with government contracts to print textbooks and other administrative documents and forms.

Advertisers still prefer traditional media over new media. Of the total advertising market, estimated at about \$35 million, over four-fifths goes to television, while three to four percent (the official estimate is less than one percent) go to online and mobile advertising. Panelists pointed out that the share of advertising revenue that is spent on online media is too small for online media to be able to survive. Political influence over the distribution of the national advertising market has been the bane of the media sector. The domination of political considerations that dictate advertising operations is well illustrated by what transpired during the presidential and early parliamentary elections held in April 2014. An opportunity eagerly awaited by all media worldwide to make some money was



“Private businesses face pressure from the government to avoid advertising their products and services in the critical and independent media. There are also the dumping prices—pro-government television stations lower their prices to the extent that they are cheaper than the advertising space in the print media,” said Zoran Dimitrovski from *Fokus* magazine.

squandered when the media, under political domination by the government, decided to cut their prices from €4.5 to just €1.5 per second of airtime, to be able to fit as much advertising time into the legal limit of €50,000 on campaign contributions by corporate entities.

The stability of financing of the public service broadcaster, seen as a crucial requirement for its financial and editorial independence, remains unresolved and direct contributions from the state budget have been increasing as a share of its total annual budget—in spite of the relatively stable and high collection rate of the monthly broadcasting fee (set at about \$3.25 per household). That significantly undermines its editorial independence and pushes it towards editorial policies favorable to the government. The public broadcasting service is allowed limited airtime for advertising, but the law seems to offer it enough leeway for it to represent serious competition to the commercial broadcasters. Non-profit media are allowed to sell advertising, much to the dissatisfaction of profitable media enterprises.

The online news sites receive only a fraction of the total advertising that goes to new media, which is not sufficient for any sort of sustainability. In fact, considering that the bulk of advertising revenue of pro-government news media comes from the government’s advertising and promotional budgets, most of the online media depend on donations, whether they come in the form of grants from foreign foundations or as indirect subsidies from the government. Online media have been reluctant to try alternative sources of revenue, due to a lack of human and financial resources and the uncertainty of the outcome, but an initiative implemented by a civil society organization is testing diverse sources of income and revenue-generating activities that the Internet, as a platform, offers.

The international corporations and the big Macedonian companies are the only ones with any sort of systematic approach to advertising, with set advertising and marketing budgets, and they usually do their media buying through the advertising agencies. Car dealers, food and confectionary industries, and telecommunications companies are the leading buyers of airtime and space. Small and medium enterprises usually lack the human and financial resources for proper marketing departments and usually rely on smaller local media with lower prices that can ensure them greater amount of airtime for their money.

Advertising agencies continue to serve as “budget keepers” for the major advertisers and they usually have some autonomy to decide on the actual media buying, although they usually get the media plans from the advertisers with the set distribution to different types of media. According to the panelists, advertising agencies truly run the market and have consistently brought down prices through their insistence on a system of discounts that ensure they get the vast majority of the available advertising budgets. Data available from the AVMS shows that in 2013, the broadcast media sold airtime worth approximately €312 million, calculated using their pricelists, but collected a total of slightly over €20 million, which illustrates the problem of agencies’ discounts and its negative effects on the advertising market. The media buying and spending of advertising budgets is also under great political influence. As noted earlier, the government was the second largest advertiser in the country in 2013 (Procter & Gamble was the top advertiser for the year).

For several years in a row, the government has been in the top five advertisers in the country. In addition, the government plays a role in deciding how public enterprises, other state institutions and, according to unconfirmed reports, even private companies, spend their advertising and marketing budgets. “Private businesses face pressure from the government to avoid advertising their products and services in the critical and independent media. There are also the dumping prices—pro-government television stations lower their prices to the extent that they are cheaper than the advertising space in the print media. As a result, businesses do not see any need to advertise in the print media,” said Zoran Dimitrovski from *Fokus* magazine.

In addition, one of the several sets of amendments to the Law on Audio and Audiovisual Services prescribe that the state will subsidize, with up to 50 percent of total production costs, domestic production of documentary and feature films produced in the languages of communities in Macedonia. The law prescribes a procedure that includes

a commission, composed primarily of representatives of government ministries, that will decide on the distribution and allocation of such subsidies, which offers a possible opportunity and another instrument to channel public funds towards pro-government media.

AGB/Nielsen provides the main ratings measurements in Macedonia. However, there is a lot of mistrust in its ratings, which some media outlets regularly dispute, and they are not really used, for example, in the government's decisions on media buying for its advertising campaigns. While the Law on Audio and Audiovisual Media Services prescribes that a national system for ratings and audience measurement of the broadcast media shall be set-up, media owners and managers have expressed fears that it will be rigged in favor of pro-government media so that government could justify its media buying decisions. The first steps towards the set up of such a system were made with the creation of an association of national television broadcasters—the Macedonian Media Association, under the auspices of the Macedonian Chamber of Commerce, and it was advertised as the starting step towards the creation of a joint industry committee that would regulate the relations on the advertising market.

There is no independent system that gathers circulation data of print media, which continues to be treated as a closely guarded secret. The few figures that circulate on the sales of print media are very rough assessments made by advertising agencies. The AVMS, which has the authority to conduct administrative supervision of the work of the print media, has issued orders to several daily and weekly publications to start printing their circulation numbers in the mastheads, which is their legal obligation. Panelists noted that, although the data is known only for the print and not for sold circulation, even if the numbers of copies sold were presented and available, there is little likelihood they would be used for media-buying related purposes, because the decisions on where to spend advertising budgets is primarily political.

Online news media once mainly used Google Analytics as their audience measurement tool, and many of them still rely on it. However, after some early problems, Gemius, the leading online ratings and analytics firm in the region, has finally established its presence and provides measurements that offer more detailed information about numbers of visitors and audience demographics. On the other hand, their prices have proven to be prohibitively high for many online news sites, which have not yet moved to fully utilize Gemius's services.

## OBJECTIVE 5: SUPPORTING INSTITUTIONS

Macedonia Objective Score: 2.19

There are two media trade associations in Macedonia: the Association of Privately-Owned Media of Macedonia (APMM) and the Association of Macedonian Internet Portals (AMIP). Also, at the end of November 2014, the new Macedonian Media Association was created gathering five national over-the-air television broadcasters, which is seen as the first step towards the creation of a joint industry committee for the broadcasting media market in Macedonia. Significantly, it has strong support by the AVMS and the Ministry of Information, which were both present at the press conference that announced the creation of the association.

The trade associations have low visibility and only appear when significant new developments affecting their operations emerge. Their ability to lobby the government is restricted by the government's inaccessibility and unwillingness to hear proposals that deviate from its own intentions and policies. The trade associations depend on members to volunteer to support their activities given the unwillingness of media owners to finance them, which has already proved to be a decisive weakness in the past with the dissolution of the earlier Association of Private Electronic Media after the end of donor support. "Until we get to the situation in which there is a real need for existence of a trade association and its members know what they want and what they will get from it—and it absolutely has to be

### SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

#### SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

**“Until we get to the situation in which there is a real need for existence of a trade association and its members know what they want and what they will get from it—and it absolutely has to be professionalized—until then we won’t have a true trade association,” Gavrilov said.**

professionalized—until then we won’t have a true trade association,” Gavrilov said.

Of the two professional associations—the AJM and the Macedonian Association of Journalists (MAN)—the former is perceived to be the legitimate representative of journalists and professional standards of journalism. MAN, on the other hand, is seen as instrument of the government to balance AJM’s protests against the pressure directed at the journalism profession. AJM has remained a strong advocate for independence of the media and journalists. However, its standing in the profession has suffered somewhat because they are perceived as having endorsed the new media legislation, albeit after a prolonged effort to fight the bills. At AJM’s annual convention in December 2014, the incumbent leadership won another four-year term. A major issue is the unwillingness of the two journalist associations to sit down and discuss the problems of the profession and attempt to find common ground in the interest of the profession.

The Independent Trade Union of Journalists and Media Workers (SSNM) also fights persistently for journalists’ labor rights. It faces constant obstructions from media owners, who have prohibited union activities in their newsrooms, and from smear campaigns in pro-government media. SSNM provides free legal assistance to journalists involved in work-related litigation.

Two main NGOs work on media-related issues in Macedonia. The Macedonian Institute for Media (MIM) provides training and programs for the professional development of journalists, while the Media Development Center (MDC) works in the areas of media policy and legislation and monitors the work of regulatory bodies and other institutions. In addition, MDC provides free legal assistance and court representation to journalists involved in defamation lawsuits. Several other NGOs work on various media or freedom of expression issues: the NGO Infocenter conducts regular monitoring of media reporting on a wide range of issues; the Center for Civic Communications works on issues related to freedom to access information; and

the Youth Educational Forum and the Helsinki Committee for Human Rights of the Republic of Macedonia fight hate-speech both in online and in traditional media. The Front for Freedom of Expression is an informal group of about a dozen NGOs and individuals that are very vocal in support of the right to freedom of expression.

Three state universities, in Skopje, Tetovo and Štip have journalism schools. MIM also has its own school of journalism and there are media and communications studies in several other privately owned higher education institutions, such as Southeast European University in Tetovo. The main problem with journalism schools, in the view of the panelists, is that there is too much focus on theory and too little practical work. Panelists also report falling interest in the journalism profession among the young to the point that MIM’s School of Journalism and Higher Education is considering the possibility to not enroll new students for the next academic year.

“The schools that we have here mostly base their curriculum on theoretical aspects and concepts of journalism. Very little attention is paid to practical skills and practical work. The numbers of students enrolling in journalism schools is dropping everywhere, in state and private universities, and journalism as a profession is not interesting to the young people anymore. The people see what is happening and nobody wants to join a profession that is exposed to attacks and pressures from so many sides,” said Tahiri.

Although fewer in number, there are still available short-term training programs, while in-service training programs have almost completely disappeared. Panelists commented that it was largely due to the unwillingness of media owners and managers to invest in their young journalists without guarantees that they will stay with the respective media outlet for a longer period of time. One panelist noted that while there may be fewer short-term training programs, those that are available are of higher quality and more focused and topical. The short-term programs provided by MIM were noted for their quality and availability for all media.

There are no restrictions on importing or procurement of necessary materials and equipment for media production, such as paper, ink, or editing and recording equipment. In fact, several panelists said that, if anything, the prices of technology, especially for broadcast media, are falling constantly and are increasingly accessible to both professional outlets and the general public.

Print media face the problem of distribution, which is monopolized by the largest newspaper company, MPM. Attempts to diversify the distribution through large supermarket chains has led to owners of such chains who

are politically affiliated with the ruling parties refusing to sell critical or pro-opposition newspapers and periodicals. Also, small grocery stores often refuse to sell critical or independent dailies and weeklies for fear of reprisals by government inspectors and tax authorities.

Television distribution is not monopolized, with several companies that operate DVB-T, IPTV, and cable networks. The problem with the virtual monopoly over the DVB-T broadcast signals held by ONE telecommunications company has not been resolved. It remains uncertain what the effects of the recent merger of ONE (owned by Slovenian Telecom) and Austrian-owned VIP may be on digital broadcasting in Macedonia.

Another problem mentioned by the panelists is the fact that the “must-carry” provision for cable network operators covers only the public service broadcasters, allowing cable operators to choose which channels they will carry and which not. For a second year in a row, one cable operator, Telekabel, refuses to carry the bilingual AlsatM national broadcaster (broadcasting in Albanian and Macedonian languages), citing low interest of its subscribers.

In general, ICT infrastructure capacities satisfy the connectivity needs of the newsrooms. Competition in the telecommunications sector leads to constantly falling prices, although possibly not at the desired rate. One major problem remaining is the low purchasing power of the population, which means that mobile Internet access remains somewhat prohibitively expensive for significant segments of the population. In addition to the rural/urban divide, the age gap still remains with young people and adults below 50 years of age far more likely to use Internet and mobile technologies. Older people stick to television as their media of choice.

## List of Panel Participants

**Sefer Tahiri**, professor, Southeast European University, Tetovo

**Bekim Ajdini**, journalist and editor, *Koha*, Skopje

**Goran Gavrilov**, executive manager, Kanal 77 Radio, Skopje

**Darko Buldiovski**, online marketing and advertising expert; blogger, *NewMediaMK*, Skopje

**Uranija Pirovska**, executive director, Helsinki Committee for Human Rights of Macedonia, Skopje

*The following participants submitted a questionnaire but did not attend the panel discussion:*

**Zoran Dimitrovski**, editor and journalist, *Fokus*, Skopje

**Dragan Sekulovski**, executive director, Association of Journalists of Macedonia, Skopje

*Although the media environment has improved since last year, when all panelists remained anonymous due to harassment for their candid comments in 2013, five out of the 12 panelists nonetheless requested anonymity.*

## Moderator

**Biljana Bejkova**, executive director, NGO Infocentre, Skopje

## Author

**Dejan Georgievski**, president, Media Development Center, Skopje

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