

# **MEDIA SUSTAINABILITY INDEX**

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## **2006/2007**

**The Development  
of Sustainable  
Independent Media  
in Europe and Eurasia**



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The Development of Sustainable Independent Media in Europe and Eurasia  
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IREX  
2121 K Street, NW, Suite 700  
Washington, DC 20037  
E-mail: [msi@irex.org](mailto:msi@irex.org)  
Phone: (202) 628-8188  
Fax: (202) 628-8189  
[www.irex.org](http://www.irex.org)

**Project managers:** Mark Whitehouse and Drusilla Menaker

**IREX Project and Editorial Support:** Blake Saville, Drusilla Menaker, Mark Whitehouse, Michael Clarke, Leon Morse

**Copyeditor:** Kelly Kramer, WORDtoWORD Editorial Services

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## MACEDONIA

The crucial media event in 2006 was the implementation of the new law on broadcast under which a new regulatory body was created. For the first time in the history of the country, the body was not chosen based on partisan or political affiliation. In theory, this should significantly improve the independence of the broadcast regulator and regulatory processes.

The elections proved to be a crucial political event for the year, with a change in power. The ruling social democrats lost to the coalition led by VMRO-DPMNE, a right-wing, democratic party. In addition, Macedonia was granted the status of the EU candidate country, but soon after the election the new government was highly criticized by both the EU and US officials for not establishing a political dialogue with the opposition.

On average, the Media Sustainability Index (MSI) scores for 2006/07 showed a drop from last year's scores. The MSI panel considered several factors to be important in this drop. First, the newly introduced law on broadcast is in a critical phase of implementation and is under revision by the new government, creating a period of legal uncertainty at the moment of re-licensing procedures.

Second, the government used the financial turmoil in the state broadcaster to put it more firmly under its own control. The new government also is using a sophisticated model for subsidizing the media through social marketing campaigns and is using these campaigns to affect their independence.

The economic environment also is hurting the media. Overall economic performance remains very low, and the media market seems to be reaching its limit in this market and is in a period of stagnation.

Panelists further saw that supporting institutions, such as journalists' associations and other media nongovernmental organization (NGOs), have lost their momentum of previous years with a resulting drop in performance. In part, the panelists believed this was due to the exit of major donors from support for Macedonian media and the lack of sustainability of these organizations without donors.

In general, the panelists were concerned that the overall environment for the media—the political, economic, and internal media dynamics—has created a situation where the media have stagnated and regressed in some areas.

# MACEDONIA AT A GLANCE

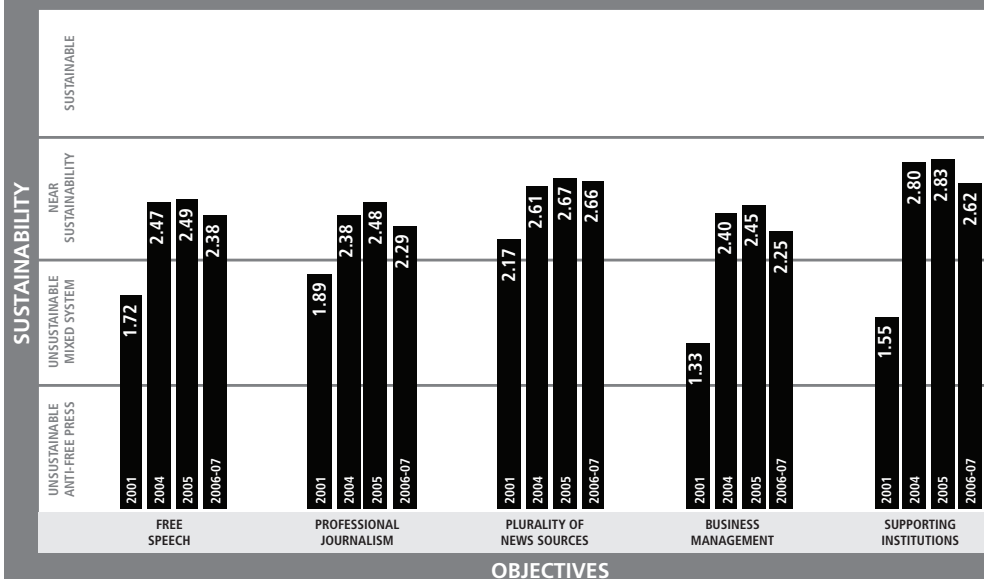
## GENERAL

- > **Population:** 2,055,915 (July 2007 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*)
- > **Religions (% 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 (2006-Atlas):** \$6.237 billion (World Bank Development Indicators, 2007)
- > **GNI per capita (2006-PPP):** \$7,610 (World Bank Development Indicators, 2007)
- > **Literacy rate:** 96.1% (98.2% male, 94.1% female) (2002 census, *CIA World Factbook*)
- > **President or top authority:** Prime Minister Nikola Gruevski (since August 26, 2006)

## MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, television stations:** Approximately 600 daily, weekly, biweekly, monthly, and periodical editions. 161 radio and television stations, 3 television channels, 29 local broadcasters, and 6 radio program services (*Broadcasting Council*, October 2005).
- > **Newspaper circulation statistics:** No reliable sources regarding circulation. *Dnevnik* is the largest paper.
- > **Broadcast ratings:** highest-rated television outlets: A1 (25.48%), Sitel (12.27%), MTV 1 (8.25%).
- > **News agencies:** Macedonian Information Agency (public), MakFax (private).
- > **Annual advertising revenue in media sector:** No accurate estimates available.
- > **Internet usage:** 392,671 (2005 est., *CIA World Factbook*).

MEDIA SUSTAINABILITY INDEX: MACEDONIA



### Unsustainable, 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.

### Unsustainable 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.

## OBJECTIVE 1: FREE SPEECH

### Macedonia Objective Score 2.38/4.00

Constitutional and legal standards for the protection of free speech are generally in line with commonly accepted international standards. On paper, the state constitutionally guarantees freedom of expression and access to information. This has been developed in several implementing laws. Most of these laws were developed with the support of European institutions (OSCE, COE, etc.) and were found by these organizations to be of relatively high quality.

However, the panel stressed that the laws are not enough. Poor implementation and a mentality of self-censorship limit their effectiveness. Specifically, the panelists noted that not only is there a culture and history of not using identifiable sources, but there is also a track record of people losing their jobs for being open to the media. This does not create a climate conducive to access to information.

"There is a certain fear among the intellectuals that they may be marginalized or detached from a certain project if they speak freely with the media, and that situation has worsened in the past year," according to Ljubica Mangovska from Tera TV.

The panelists also agreed that there are other, sophisticated techniques used to keep criticism of their activities to a minimum. "We can say that because of the common political

atmosphere and because of the pressure of big business, the situation had worsened," said Sarah Broughton of the OSCE.

The panel also stressed that the new licensing procedures under the new broadcasting law have yet to be tested in action. The envisaged procedure under the law guarantees fair licensing procedures. Panelists did note one issue they believed to be unfair: former local public broadcasters that are undergoing the process of privatization are exempt from paying for licenses over the next nine years. The second problem is that the broadcast law itself and licensing procedures have been open to potential change by the new government.

A novelty in the taxation system, introduced in the past year, is a new special tax of 15% that media and other legal subjects are obliged to pay for buying foreign programs. This new tax, combined with a lack of the knowledge of media economics in the public revenue office and among the tax inspectors, can have a negative impact on the financial security of the media. The panel graded this indicator very low, substantially influencing the overall score of the objective.

Crimes against the journalists are rare, but they are not prosecuted vigorously.

Public media have guaranteed independence according to the law, but it is not functioning. "The government used the poor financial situation within the PBS [public broadcasting system] to stop the reform process and through subsidizing schemes has put it back under its total editorial control," said Roberto Belicanec, program director of the Media Development Center.

Libel is still under the criminal code, but it has been "de-penalized." There is no longer a threat of jail but rather fines. However, the real problem in this regard is that there is massive influence on the courts and corruption that affects the legal outcomes. Therefore, journalists rarely win libel cases. "The judges usually feel uncomfortable when they deal with this kind of process and usually insist that the media apologize in order to avoid bringing a verdict," according to Aco Kabramov, editor-in-chief of Channel 5.

The Law on Access to Information was introduced in the past year, but it has not been fully implemented. The law itself also has certain weaknesses that cause it to fall short of generally accepted standards in this field. The commission for access to information does not have access to classified documents. Additionally, a culture of private contacts remains the primary means of gaining access to information, rather than testing the legal means. These sources generally are threatened with losing their jobs if the release of information is verified and in many cases when it seems routine. "Two managers of public enterprises were replaced by the mayor of Bitola only because they gave statements in front of our cameras," said Mangovska.

## 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 of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > 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 accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

*The ethical code for Macedonian journalists lacks means for implementation since the ethical commission is not functioning. Panelists felt that this greatly contributes to the breach of the code. "These breaches are not major ones but are numerous," said Broughton.*

The media do not have any limitations in accessing international news and news sources, except for their financial resources to pay for such sources. The government does not impose any special licensing for journalists. However, it has influence on the employment policy of the public broadcaster (the largest single media employer) and also handpicks the journalists who may cover certain events. Also, privileges are granted to certain journalists who are in the favor of the government.

## OBJECTIVE 2: PROFESSIONAL JOURNALISM

### Macedonia Objective Score 2.29/4.00

This objective witnessed a drop to 2.29, from 2.48 in 2005. Panelists attributed this decrease to the unsatisfactory level of already downgraded technical abilities, mainly in broadcast, to gather the news; an unsatisfactory level of salaries in the industry that has not kept pace with the growth of living

#### 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.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

costs; and to the continued low level of the adherence to ethical journalistic standards.

The general opinion of the panel was that there has been some progress in the way news is gathered and presented. "The training had helped, in that the newcomers at least respect the basic professional rules, such as 'ask the other side.'" The journalists in their everyday work try hard to fulfill the basic standards of the profession," said Kabramov. However, the view was that it has not progressed substantially toward a more sustainable and professional level.

The ethical code for Macedonian journalists lacks means for implementation since the ethical commission is not functioning. Panelists felt that this greatly contributes to the breach of the code. "These breaches are not major ones but are numerous," said Broughton. Naser Selmani disputed that opinion, saying, "There is an awkward situation where you have the spokesperson of the public state-owned company who is at the same time a journalist and a news presenter." Kabramov added: "And on top of it conducts an interview with the prime minister."

Journalists and editors practice self-censorship mostly because of opportunism, not because of fear of prosecution or other threats. Journalists receive benefits for not reporting on certain issues, people, or items. Unfortunately, this opportunistic attitude is increasing.

Journalists do cover daily issues and important topics for society, but they are failing to deliver in-depth reporting on these topics. Therefore, they fail in their job of informing the public debate on important issues. Additionally, panelists feel that international news is covered marginally and important international events do not get satisfactory treatment.

"We were trained to treat the international news that way by the foreign trainers; they were constantly stressing to us that we should focus on domestic events," Mangovska said.

Salaries of journalists were a major concern to the panel. "We got the lowest salary level in the region," Selmani said. Salaries in the profession are not keeping pace with the rise in living costs. Salary levels of journalists are in line with the general Macedonian population—between 200 and 400 euros per month. But the low, real level of the salaries makes journalists vulnerable to accepting payment for reporting or other favors.

News has the highest ratings of all programs; entertainment programs have been closing in over the past year, but they remain second to news. "In our cultural context, news is entertainment. Very often it seems that you watch some Latino soap opera. Long-lost brothers of the ministers caught in the illegal financial schemes, uncles of politicians in the middle of corruption..." Belicanec said.



Media owners claimed that the technical capacity of the media has declined. "There is no significant investment in the media in the past two years; simply the broadcast is not profitable anymore....," Mangovska said. The situation is much better in print media. But the overall poor economy for media is hurting the capacity of broadcasters to invest in modern news gathering and broadcasting equipment.

Niche reporting exists in the major media, especially in coverage of the economy and sports. These two areas are usually covered by teams of reporters. Other areas are covered by the general beat reporters.

### OBJECTIVE 3: PLURALITY OF NEWS SOURCES

#### Macedonia Objective Score 2.66/4.00

This objective remained essentially unchanged since 2005. Macedonia has an overcrowded media landscape that most observers believe cannot sustain all the outlets currently in operation.

The audience has a multitude of domestic and international sources of news to choose from in broadcast and print. There are six national television stations, three national radio stations, and six major newspapers. The offerings vary in genre, language, and political attitude. Television is the first choice for news, followed by the daily newspapers and then radio. The Internet is not yet a significant news source for the population due to a "digital divide." The penetration of cable networks has reached almost 50 percent of the population.

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

##### PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens' access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge 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.

There are no legal obstacles for citizens to access any of these media. The problem is affordability. Newspapers have prices that are on the margin of their operational costs in order to remain affordable to a solid segment of the population. They are forced to sell at the lowest possible price because of the weak purchasing power of the Macedonian audience. The digital divide is huge and is driven by prices for Internet access that are unreasonably high for the average Macedonian.

International news sources are not limited in any manner. Foreign broadcast programs are present via cable distribution in almost half of the homes in Macedonia, and many do access satellite programming. The problem of affordability of the foreign press is significant due to the high prices of foreign magazines and newspapers. Local distributors price them at almost twice their original newsstand price. The situation is different for the press that is coming from neighboring countries, as that is priced reasonably.

The panelists scored the issue of public broadcasting rather low. The nominal public broadcaster has significantly changed its attitude toward and coverage of the government, reflecting increased government control of the broadcaster. The professional standards on its programming also have been significantly downgraded. In general, it largely fails to reflect the whole political spectrum. More important, in this moment it functions as pure state propaganda.

The increased governmental control came about due to the financial problems of MRTV, which allowed the government to impose strict control over its operations. Panelists found it discouraging that the mentality of the employees did not lead to a struggle against tightened government control. They are not willing to seek editorial independence and do not show that they respect the values of public-service broadcasting in the European sense. "We have changed our roles; the private broadcasters are fulfilling the role of the PBS," Mangovska said.

There are three news agencies, one state-owned and two private. Their existence is considered insignificant, as they are not major news sources for most media.

Major private broadcasters produce their own news. Their news is more dynamic, more informative, and less biased than the PBS news. Major broadcasters consider the newscast the most important program on their menu and devote significant resources to its production.

The transparency of media ownership is considered satisfactory. However, the legal provisions regarding this in the broadcast law do not function yet, and there is no obligation for the print media to disclose their ownership. But the public generally knows the owners of the major media in the country. "It is not a problem to find out who owns certain

*Minority issues in both social and ethnic terms are on the media agenda. There are minority media in the minority languages.*

media; the problem is to find out who is financing it and how," said Mangovska. "The ownership is a major problem of the Macedonian media—three out of five private national TV stations are owned by the leaders of the political parties," said Erol Rizaov, editor-in-chief of *Utrinski Vesnik*.

There are three major media groups in the country that either are under the same ownership or have established active synergies: the WAZ group (German) consists of three major daily newspapers, one weekly, a distribution network, and a printing plant; A1-Vreme group (the most powerful private television station, national newspaper, and distribution network); Vecer-Sitel-Cetis group (national newspaper, national television station, and printing plant). The ownership problem also exists through the ownership of the media by big businesses. This creates a subsidized media economy that greatly damages editorial independence.

Minority issues in both social and ethnic terms are on the media agenda. There are minority media in the minority languages.

#### **OBJECTIVE 4: BUSINESS MANAGEMENT**

#### **Macedonia Objective Score 2.25/4.00**

Macedonia's scores declined in business management to 2.25, from 2.45 in 2005. Panelists indicated that the media economy is in a period of stagnation. The growth of the market has been weak, unfair processes in advertising do not promote sound business management, and mistrust of the ratings system contributes to poor business management. Additionally, a new trend of state interventionism in favor of pro-governmental media presents a new problem that threatens market-based approaches to media management.

Advertising agencies are profitable enterprises, but their attitude toward the media is considered by the media to be unfair. "The prices of advertising in countries with a similar size and economy are much higher than in Macedonia. The agencies are using that to report to their clients unrealistically high prices and they keep around 50 percent commission rather than the usual 10–15 percent. If you do not agree on this kind of blackmail, they will cut you loose. I never agreed to such schemes, and I lost many advertising agreements," said

Goran Gavrilov, owner of Channel 77. This story was backed up by the other media owner on the panel, Mangovska.

The problems with the advertising market and the poor management of media are derived partly from the lack of a credible ratings system that is accepted by the media, advertisers, and research community. The media are suspicious of most ratings and view them as biased. Broughton said that "the media do not know how to use the ratings and therefore they do not believe in it." Robert Popovski, president of the Association of Journalists, said, "It is normal that media do not trust in the ratings when one media is constantly with highest ratings." The panel generally agreed that the media lack training for the usage of the ratings even as they expressed significant mistrust in the present rating system.

A second problem concerns the structure of the media industry, its ownership, and its relationship with political power. Most of the media are owned by other large enterprises with strong political connections. They usually subsidize shortfalls from the market, making management efficiency less of a concern. This subsidization of private media, together with subsidies for MRTV, leads to a depreciation of the advertising prices.

This weak market structure is further undermined by the sophisticated subsidization through a social campaign that the state has recently started. Payments for this campaign are used to financially support pro-governmental media. At present, the biggest sole advertiser in the country is government. Bluntly said, according to panelists, "broadcast in Macedonia is not a business."

#### **INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.**

##### **BUSINESS MANAGEMENT INDICATORS:**

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > 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 at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

## OBJECTIVE 5: SUPPORTING INSTITUTIONS

### Macedonia Objective Score 2.62/4.00

The rating for supporting institutions fell to 2.62, from 2.83 in 2005. The main problem pointed out by the panel was that the supporting institutions have lost their momentum and face a variety of problems that have sapped their effectiveness and led to stagnation in their development.

The media owners' organizations are functioning largely by inertia. The crucial organization, the Association of Private Electronic Media of Macedonia (APEMM), remains vocal in advocating for solutions to the problems of the broadcast media. However, its internal limitations hinder its effectiveness. The decision-making process within APEMM is not structured to allow a coalition of interests to emerge.

For instance, the local and national media have different interests, yet there is no conflict-resolution tool within the association that may be used for settling these differences and allowing APEMM to effectively serve both interests. As a result, APEMM has been dominated by the national television stations. To be fair, it has advocated on issues that are of general importance to the entire broadcast sector, such as copyrights.

Once the general issues are solved, the potential crisis that may emerge from the differences in interests among the different broadcasters may lead to a split in the association, according to many. However, it is uncertain that Macedonia can effectively support two broadcast owners' associations, and if so, whether local broadcasters' voices could be heard in their own association. Therefore, the perceived need is for internal formalization of the decision-making processes and restructuring that will take into consideration the particular interests of each side.

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

##### SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists' rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

The journalists' association may be slowly waking up from its hibernation. It underwent an internal process of the reelection of the leadership, but it was almost invisible in the past year. "The level of journalistic professionalism affects the level of the performance of the association," said its president, Popovski. A more serious problem is that the journalistic community itself does not fully agree on or recognize the need for an association. Divided along the lines of political and business interests, journalists also have problems articulating their common interests.

NGOs that traditionally supported the media and journalists have downsized their operations and now pursue activities focusing on one to two smaller projects. The main reason for this is the lack of financial resources due to the donors' exit from Macedonia. Domestic financial sources are considered as highly risky for the NGOs' independence.

Most training that is available is considered unsatisfactory. The state university has journalism studies, and several private universities offer communications studies. However, the courses are highly theoretical. Students find that when they graduate they have to learn on the job. The Macedonian Institute for the Media offers a one-year journalism course. This is considered to be of satisfactory quality.

Printing facilities and distribution networks are in private hands, and there are no restrictions to their access.

### Panel Participants

**Aco Kabramov**, Editor-in-Chief, Channel 5 TV, Skopje

**Goran Gavrilov**, Manager, Radio Network Channel 77, Stip

**Ljubica Mangovska**, Program Director, Tera TV, Bitola

**Robert Popovski**, President, Association of Journalists, Skopje

**Nebojsa Karapejovski**, Manager, TV Menada, Tetovo

**Roberto Belicanec**, Media Development Center, Skopje

**Sarah Broughton**, Media Development Unit, OSCE, Skopje

**Naser Selmani**, Journalist, *VEST* daily newspaper, Skopje

**Erol Rizaov**, Editor-in-Chief, *Utrinski Vesnik* daily, Skopje

**Muharem Zeqiri**, Editor-in-Chief, ALSAT TV, Skopje

### Moderator

**Gazmend Ajdini**, IREX, Skopje

### Observers

**Melita Cokrevska**, USAID, Skopje