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# MACEDONIA

Beginning in April 2016, Macedonians gathered every day at 6 p.m. in front of the Special Prosecutor's Office to protest government corruption. Spurred by the opposition's release of illegal wiretaps that revealed the depth of the degeneration, the "Colorful Revolution" further erupted when President Gjorge Ivanov announced his decision to pardon all persons involved in potential investigations. Activists pelted the walls of government institutions and the drywall and Styrofoam-clad *faux Baroque* facades in downtown Skopje—symbols of the hated "Skopje 2014" Project—and demanded resignations, justice, and reforms.

After being postponed in April and then June, the early parliamentary elections were finally held on December 11 after another European Union and United States brokered deal: the Pržino II Agreement. The election results saw the parties in the incumbent ruling coalition, the Internal Macedonian Revolutionary Organization-Democratic Party for Macedonian National Unity (VMRO-DPMNE) and the Democratic Union for Integration, losing ground in Parliament, although they still managed to win the plurality of Macedonian and Albanian voters, respectively. Despite a fierce fearmongering nationalist campaign by VMRO-DPMNE, a significant number of ethnic Albanians voted, for the first time, across ethnic lines to support the Social Democratic Union of Macedonia. Nevertheless, with close results and uncertainties as to who will form the next government, the political crisis is far from over and may extend well into 2017.

European integration for Macedonia seemed to be falling back into place in 2016, with the European Commission again conditioning the recommendation to start accession negotiations in its annual progress report. The progress report focused on the prolonged political crisis and demanded that Macedonia make progress in implementing "urgent reform priorities" and hold credible elections.

Macedonia managed to maintain overall macroeconomic stability, but economists voiced serious concerns over the growing public debt, which reached 52.3 percent of GDP at the end of 2016. The government has borrowed actively both domestically and internationally. Its growth rate of 2.4 percent in the second half of the year was solid and one of the highest in Europe, but well below early predictions of 3.7 percent. It is also short of the 6 percent annual growth rate necessary for improved standards of living, which in Macedonia remain among the lowest in Europe. Shrinking economic prospects and falling living standards have led to the continued migration of Macedonia's young population.

Macedonian media were an important item on the agenda of the Pržino II Agreement in July 2016. Macedonian political parties accepted an obligation to engage in serious reforms of the media sector; to eliminate political, economic, and judicial pressures on media and journalists; and to ensure independence of the public broadcasting service and broadcast regulatory body. One new cable television station, TV Nova, entered the already congested broadcasting market; however, several traditional media outlets downsized.

# MACEDONIA at a glance

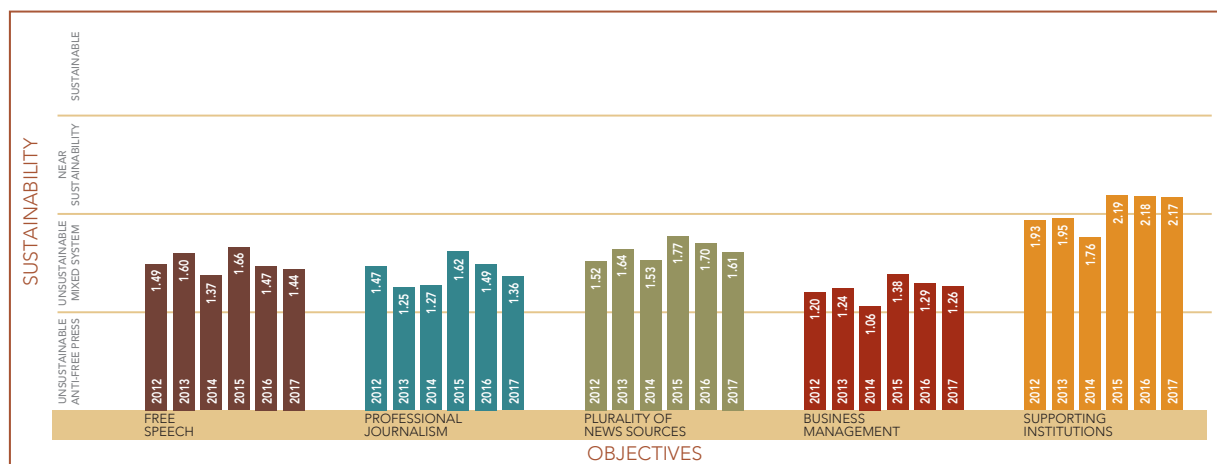
## GENERAL

- > **Population:** 2,100,025 (July 2016 est., CIA World Factbook)
- > **Capital city:** Skopje
- > **Ethnic groups (% of population):** Macedonian 64.2%, Albanian 25.2%, Turkish 3.9%, Roma (Gypsy) 2.7%, Serb 1.8%, other 2.2% (2002 est., CIA World Factbook)
- > **Religion (% of population):** Macedonian Orthodox 64.8%, Muslim 33.3%, other Christian 0.4%, other and unspecified 1.5% (2002 est., 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 est., CIA World Factbook)
- > **GNI (2015-Atlas):** \$10.67 billion (World Bank Development Indicators, 2017)
- > **GNI per capita (2015-PPP):** \$13,570 (World Bank Development Indicators, 2017)
- > **Literacy rate:** 97.8%, male 98.8%, female 96.8% (2015 est., CIA World Factbook)
- > **President or top authority:** President Gjorge Ivanov (since May 12, 2009)

## MEDIA-SPECIFIC

- > **Number of active media outlets:** Print: 10 daily newspapers (one specialized sports daily), 3 weeklies, 20+ other periodicals; Radio: 3 public radio channels and 4 commercial radio stations broadcast nationally, 17 radio stations broadcast regionally, 53 radio stations broadcast locally; 3 non-profit university/student radio stations; TV Stations: 5 state channels, five DVB-T national broadcasters, 9 national cable stations, 16 regional DVB-T stations, 12 regional cable stations, 24 local cable stations (Agency for Audio and Audiovisual Media Services)
- > **Newspaper circulation statistics:** Top three by print circulation (data on copies sold is not available): *Vest* (32,000), *Dnevnik* (25,000), *Sloboden pečat* (14,800)
- > **Broadcast ratings:** Top 3 by share of audience: Sitel TV (23.21%), Kanal 5 TV (16.31%); AlsatM TV (6.01%) (AGB Nielsen Macedonia, December 2015)
- > **News agencies:** Macedonian Information Agency, Makfax; online news agencies NetPress.com.mk and Meta.mk
- > **Annual advertising revenue in media sector:** €30 million (est., marketing365.mk website)
- > **Internet Users:** 1.1 million (2009, 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.

Scores for all years may be found online at <https://www.irex.org/msi>

## OBJECTIVE 1: FREEDOM OF SPEECH

Score: 1.44

Freedom of expression and media freedoms retained their prominent positions in the public discourse in Macedonia in 2016. As in the 2015 Pržino Agreement, a deal brokered by the EU that aimed to help resolve a prolonged political crisis, the need for reforms in the media sector were a main feature of the July 2016 agreement. The agreement helped establish December 11 for the elections, but also included some agreements on media. The leading parties in the Macedonian and Albanian political blocs accepted reforms in the media sector to eliminate all forms of political, economic, or judicial pressure on media and journalists, and to remove instruments for the corruption of media.

In general, media legislation in Macedonia is consistent with international standards. However, the panelists and the general public feel legislation is implemented selectively and falls short of meeting and achieving its aims and purposes.

Constitutional and legislative protections and guarantees for freedom of expression and media are of little value in Macedonia's deeply divided society. Among pro-government and independent/pro-opposition media, tensions remain, with the two sides continuing to accuse each other of propagandist reporting, the use of hateful and unacceptable speech, the betrayal of professional standards, and working for the highest bidder. The same political divisions prevail in Macedonian society, with both sides actively denying the other, or anyone

### 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 fact that those who asked for a license got it is a serious indicator that something is wrong with the whole approach to licenses. I don’t think we can protect or promote public interest in broadcasting with such an approach. Our approach to licensing doesn’t take public interest into consideration at all,” Klime Babunski, a media analyst and researcher with ProMedia, said.

expressing some form of dissent, the very right to freedom of expression. Those who support a more open, democratic, and inclusive society remain in the minority, albeit a minority that seems to be growing. Panelists say the situation has improved over previous years, with a growing number of people publicly protesting the situation in the country, including abuses and restrictions in freedoms of expression and media.

In Macedonia, only broadcast media are subject to licensing requirements, which are managed by the Agency for Audio and Audiovisual Media Services. Although the same criteria and requirements apply to both broadcast and Internet or cable channels, terrestrial digital broadcasting licenses have to be allocated through a public tender procedure, while the licensing of cable and Internet-protocol television broadcasters requires no such procedure, and licenses are awarded automatically. In addition, for digital terrestrial broadcasting, the Agency is required to conduct a feasibility study to determine if there is a need for a new broadcaster and its proposed programming format.

Panelists say the body that allocates the licenses is politically dominated. Those outlets that apply tend to receive licenses, but then face an expectation that their editorial policies will be favorable to the government in return. Some oppose the approach to license allocation and actually feel it is too liberal. “The fact that those who asked for a license got it is a serious indicator that something is wrong with the whole approach to licenses. I don’t think we can protect or promote public interest in broadcasting with such an approach. Our approach to licensing doesn’t take public interest into consideration at all,” Klime Babunski, a media analyst and researcher with ProMedia, said.

After past accusations of the ruling party politically dominating it, the Agency did make some efforts to “clean up its act” and perform its duties in a seemingly more independent fashion. However, the appointment of governing/steering body members and legally authorized nominators remains questionable, and



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there continues to be calls to the legislature to remedy the process.

Other media, including print and online media, are not subject to licensing, but the Agency keeps a register of print media and maintains some oversight. The regulations include registering as either a commercial company or civil association. The registry does not include online media. The proliferation of online media that created havoc in the market has largely subsided, but proposals that they, too, should enter some form of registration process continue.

The law stipulates free and fair entry into the market for all media. That market, however, is small and shrinking, yet still oversaturated—a situation that makes the media vulnerable to economic pressure and influence. The regulatory body fails to use licensing procedures to intervene in that regard. Last year, there was one initiative to open a public call for a national Digital Video Broadcasting–Terrestrial (DVB-T) license, and a feasibility study showed that there is a need for one general format or one specialized education programming service, but the whole process was postponed by the elections. The process is expected to continue in 2017. TV Nova, a new cable station, began broadcasting in 2016, and the Agency also issued several licenses for local radio broadcasting. However, one of the two Roma language television stations lost its broadcasting license in 2016 over its inability to pay the annual license fee.

Tax regulations are impartial and objective. However, while there were no cases in 2016, media critical of the government fear they are more likely to get a visit from tax authorities than their pro-government counterparts are. It has been suggested that this past year, tax authorities were far too interested in civil society organizations involved in the Colorful Revolution to bother journalists. Panelists feel that some form of tax relief or privileged taxation rates should be introduced to help the media, which has been hit hard by the current advertising crisis. To secure the right to broadcast music, outlets are charged 4 percent of media outlets' gross income (pre-tax) instead of net income, which, in the view of panelists, constitutes another de facto type of taxation.

The Association of Journalists of Macedonia reported more than a dozen attacks on journalists and media professionals in 2016. Incidents included verbal and physical assaults, preventing journalists from reporting on events, and destruction of professional equipment and personal property. Unlike previous years, panelists observed some progress and praised the readiness of fellow journalists, human rights defenders, and civil society activists to react strongly and immediately to such incidents. Buoyed by the atmosphere of protests that took place for the better part of the year, the support for journalists turned into another cause for mass protest. However, panelists said such incidents still fail to produce proper reactions from

law enforcement or the judicial system, and perpetrators remain unknown and at large.

One example panelists cited is the case of journalist and blogger Zoran Božinovski. After spending a year in detention in Serbia, he was extradited to Macedonia and is currently in custody awaiting trial on charges of espionage, extortion, and criminal association. Human rights organizations, journalist associations, and media outlets are convinced the charges against him are trumped up, and his past reporting of abuses of power by security and intelligence services is the real reason for his persecution.

The political divisions between the media run so deep, several panelists commented, that pro-government outlets go so far as to claim attacks on journalists have not taken place and are simply false accusations to smear the government or ruling parties. Other outlets even claim that attacks against reporters are justified.

The guarantees of editorial independence for the public broadcasting service, Macedonian Radio and Television (MRT), suffer from poor implementation and often are not adhered to. The systems and procedures for appointing members of the Programming Council of MRT, its governing body, allow the government to circumvent the law and ensure strong control over its programs. Nominations for the Programming Council are typically from groups reliant on government funding. The same is true of appointments for top editorial positions in the public service broadcaster; editors are selected because they are certain to do the government's bidding and view the MRT not as a public broadcasting service but as state television. Additionally, the Programming Council does not reflect and represent the diversity of Macedonian society and its distinct groups: ethnic, religious, youth, and disabled groups are not represented properly.

Defamation and libel have been decriminalized since November 2012. The Law on Civil Liability for Defamation provides special treatment for journalists and media and sets limits to the amount of compensations/fines they may be ordered to pay. Even with such limits, which are set at amounts that are rather insignificant based on Western standards (\$2,150 for the journalist, \$10,750 for the editor, and \$16,100 for the publisher), the costs are potentially devastating for the impoverished media in Macedonia. Outlets fear every defamation lawsuit because one maximum fine may force them to close shop. *The Priebe Report*, an independent analysis conducted at the behest of the European Commission, strongly recommended reforms in defamation legislation in an effort to limit the judicial pressure that the threat of lawsuits placed on journalists. Defamation was not a common topic among public discourse, primarily because of a lack of high-profile cases and also a prolonged strike by the court clerks and administration that limited courts to hearing

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only urgent criminal cases. One panelist stated that judges still apply double standards and noted the case of his own editorial office, which had two defamation lawsuits against other pro-government media and journalists dismissed by the court.

Problems with the transparency of government and public administration and institutions are alive and well, with many institutions remaining closed to the public and the media, despite clear legal obligations to make information available upon request. Authorities limit access to information by either abusing legislation on classification and confidentiality or by relying heavily on stall-and-delay tactics, hoping that whomever requested the information will get tired of waiting and give up. The information that is released, according to panelists, is incomplete, heavily redacted, or not related to the actual request. Panelists noted that pro-government media are more likely to receive information because the government and supporting institutions are certain to get a positive spin. Panelists noted other unexpected problems with their requests for information, such as finding a story they pursued suddenly being published by the competition. "It happened to us when we sought information on travel and transportation costs reimbursed to members of the State Election Commission. They tried everything, delayed the whole process. It took weeks, only for us to see another TV station break our story," Gordana Duvnjak, an editor with the daily newspaper *Utrinski vesnik*, said.

In general, the government is keen on controlling all information released to the public. Government ministers and officials usually talk to pro-government media, outlets that are expected to publish the information without critical thought. Panelists also said government ministries and other officials inform independent media about upcoming press conferences only 10 or 15 minutes in advance. Formally, everybody will have been informed and invited, but only pro-government outlets will be there to lob easy questions. Government officials often refuse to answer or outright ignore questions asked by media and journalists they do not see as friendly.

There are no legal or practical restrictions to the access of local and international news and news sources, and we have not seen any efforts at filtering foreign online news sites. The only legal requirement regarding media content is the obligation to black out screens of foreign channels available on Macedonian cable providers when they carry programs held by a local Macedonian broadcaster.

Most traditional print and broadcast media have agreements with at least one international news outlet. Smaller media, especially online, are rarely able to afford the services of international news outlets and rely mainly on foreign Internet news sites as major sources of international news, especially infotainment that attracts large audiences, with little regard for

intellectual property and copyrights. While some of them may apply principles close to the "fair-use" doctrine, fair use is not part of East European legal tradition (although some countries have their own versions) and systems, and is not part of the copyright legislation.

Entry into the journalistic profession is completely open and without restrictions, subject to occasional protestations by reporters and analysts who actually hold university degrees in journalism. Periodically, there are renewed calls, usually by pro-government media and journalists, for the creation of some sort of official journalistic license, although nobody knows which body or institution would issue such licenses. The Law on Media does not view bloggers and citizen journalists as official reporters, and professional reporters and analysts do not view them as peers; rather, professional journalists perceive bloggers as unwanted and unfair competition for scarce advertising revenue. Still, many ethnic communities, especially the Roma, remain underrepresented in the ranks of national mainstream media. Other minorities are also underrepresented, including the LGBTI community.

A regular press identification card issued by an editorial office or by the Association of Journalists of Macedonia is sufficient to secure access to events or press conferences. Only a handful of institutions, such as Parliament, issue their own special credentials to cover their work and activities.

## OBJECTIVE 2: PROFESSIONAL JOURNALISM

Score: 1.36

The prevailing political divisions in Macedonian society are evident in the way media approach and treat the facts and information in their reporting, and the extent to which they observe the accepted professional and ethical standards of the journalistic profession.

As a general rule, independent media and media critical of government policies do a better job in presenting fair and objective reporting, although some exhibit positive bias toward the opposition. While internal fact-checking departments are virtually unknown because of cost, these critical outlets make an effort to confirm and verify their information. They tend not to mix personal opinions or editorial positions in their reporting and try to provide all actors involved in an issue ample space to present their views. Often, however, they do not get any comments from government or ruling-party officials, although not for a lack of effort to secure those comments.

Journalists in pro-government media are seen primarily as instruments of the government's propaganda, and some even venture into the realm of fake news and false or fabricated information in their attempts to smear political

opposition, independent journalists, or, increasingly, civil society organizations and activists of the Colorful Revolution. Both independent/critical and pro-government media rely on their respective pools of experts to affirm or strengthen the positions presented by journalists, although independent media are more likely to seek comments from all sides of the political divide.

Online media, pressured by the demands of the 24-hour news cycle, rarely have the time or inclination for things such as fact-checking and verification. However, several online media outlets, with foreign support, remain the last bastions of investigative journalism, which, as panelists noted, has been largely expelled from the pages and airwaves of traditional mainstream media.

Macedonian media, in general, lack internal self-regulatory practices, codes, style guides, or proper statements of editorial policies. A self-regulatory body at the industry level, the Media Ethics Council was established in 2013, and it deliberates and reviews complaints based on provisions of the International Federation of Journalists' Declaration of Principles and the Macedonian Code of Ethics. The Code of Ethics is today, for all practical purposes, an internal ethical code of the Association of Journalists. Their counterparts from the Macedonian Association of Journalists have yet to declare any such set of principles. The Media Ethics Council makes an honest effort to increase its profile and standing in the media community, but its authority or competence is challenged constantly by all media found in violation of professional standards, leading to a lack of confidence. Additionally, some media, despite helping to found the Code of Ethics, do not accept its jurisdiction and refuse to accept its rulings and decisions.

Panelists said journalists in general have no qualms accepting gifts, usually presented as part of promotional campaigns from

major companies and corporations. Advertorials, including commercial and more recently political, are increasingly common, both in traditional and online media. Journalists in Macedonia view plagiarism as a necessary evil. In general, this concerns sources of international news. While all outlets see international news as a need, very few outlets have the financial means to secure the services of major outlets and newswires that provide such news. In general, both online and mainstream media provide adequate attribution of source material they have republished, but they rarely, if ever, ask for permission to use such material, and the scope and amount of material used goes well beyond what is generally seen as fair or acceptable.

There is a constitutional ban on censorship in Macedonia, but that does not mean self-censorship is not a problem. As noted by panelists, through many years of political and economic pressures, journalists have honed their skills to recognize immediately what they can and cannot report. Media owners impose self-censorship and selective reporting in an effort to avoid any conflict that could jeopardize or undermine their other businesses. The Law on Media allows journalists to resist requests to act in violation of professional standards and to refuse to sign articles that have been changed without their knowledge, but panelists said there has yet to be an editor or owner sanctioned for what they see as a rather common violation.

Media owners are especially sensitive to the needs of major advertisers, who often get full exemption from any and all coverage or interest in their shadier practices. Suzana Nikolić, owner/editor-in-chief of the local news site Kumanovonews.com and correspondent for several national media outlets, offered her own example. "In Kumanovo, I had this case with a citizen who bought a new car from a company that regularly buys advertising space from the media that I worked for at the time," she said. "He had a traffic accident and noticed that, although the car was sold to him as new, it was repainted, so he suspected that it was a secondhand overhauled car. When I went to my editors with the story, they refused it, saying we can't go against our financiers."

Key events and issues are covered, but the scope and depth of coverage depends largely on actual capacities of individual media. Small editorial offices focus on republishing and digesting reports published by media with the personnel and technical ability to provide more comprehensive coverage. Some media, including some traditional or mainstream offices, increasingly rely on social networking and blogging sites to fill their commentary and op-ed pages. Most citizens browse numerous stories, from different types of media—broadcast, print, or online—to gain a better understanding of the given story. Another cause for concern, visible across the board owing to shrinking newsrooms, is the growing trend of relying on

## 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.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

**“We see that it is the most corrupt journalists and editors who get the highest salaries, and it is because they are corrupt that they get such salaries, not vice versa,” said Žarko Jordanoski, journalist/editor at Sloboden Pe at.**

“churnalism”—carrying press releases of political parties and other entities without any critical or analytical approach.

Journalists’ salaries are below the national average, certainly well below other professions or civil servants, and are far from sufficient to cover even the bare necessities for a minimal standard of living. The average salary in broadcast media is about \$280 per month and much lower in other types of media. Panelists generally agree that salaries are well below any level of propriety and decency. For online media that specialize in investigative reporting with the assistance of foreign donors, the situation is somewhat better. Reporters and photographers who have secured positions as correspondents or stringers for foreign media or news outlets are also better able to secure a decent monthly income. At the other end of the scale, there are several well-paid editors or journalists who essentially serve as external public relations departments for the ruling party, gigs that may land them lucrative moonlighting engagements as public relations experts and consultants. In general, journalists feel forced to take side jobs, or leave the profession entirely for better salaries in the public relations or advertising sectors.

As panelists noted, the correlation between low wages and susceptibility to corruption is not all that straightforward. “We see that it is the most corrupt journalists and editors who get the highest salaries, and it is because they are corrupt that they get such salaries, not vice versa,” said Žarko Jordanoski, journalist/editor at *Sloboden Pečat*.

The great number of media, including broadcast, print, and online, allow citizens to get the news when and where they want. As a rule, people tend to watch regularly the main newscasts aired by at least two television stations. Television remains king, with surveys finding that it continues to be the primary source of news for about 85 percent of citizens. The Internet is gaining ground, while print media and radio lag far behind.

Pressed by the need to attract as many viewers or readers as possible, most media continue the steady move toward more entertainment programming. Broadcast media do have to follow legally prescribed quotas for education, entertainment, and information programs, depending on the format of their

licenses. Most of them broadcast under general format—predominantly an entertainment license. Generally, between 20 and 30 percent of total aired programming is dedicated to news. Primetime slots on the leading television stations are reserved for reality programs, which are inexpensive to produce or acquire broadcasting rights. Most shows such as these, panelists said, originate from a single neighboring country. Turkish soaps and serial dramas still dominate the airwaves, and as such, most television stations sandwich their main daily newscasts with popular soaps, drama serials, or reality programs to ensure audiences also watch the news.

Print and especially online media also opt for trivial show-biz and sensationalist news, and various “click-bait” tactics, in an effort to maximize advertising revenue. The political crisis has, however, resulted in a somewhat greater focus on news and information, and several new political debate and talk shows began airing in 2016.

The biggest national broadcast and print outlets have solid technical capacities for the collection, production, and distribution of news. Several national television broadcasters have recently made significant investments in new studio facilities and equipment. Smaller media, especially local broadcasters, have to work on much older and sometimes outdated equipment, as they cannot afford any upgrades. Online media have benefited from the cheap technological platform they use and the availability of new handheld video- and audio-recording devices.

The synergy of traditional and new media has not necessarily gone smoothly. Some feel, for example, that traditional media do not use the Internet enough by taking advantage of content-related and news- and information-gathering advantages that their online extensions have to offer. Online media, depending on the previous experiences of their owners or journalists, have yet to use the full multimedia potential that the Internet offers for the integration of text, audio, and video in a full interactive news experience. Only specialized investigative journalism websites use new forms, such as data journalism, regularly and with actual effect and impact.

As a part of its legal remit, the public broadcasting service leads the way in providing diverse and specialized programs. Commercial traditional media have mostly downsized their newsrooms because of financial reasons, and journalists are now expected to cover whichever topic or event comes next. Lack of investment in proper training and education also makes it difficult to specialize.

Specialization and investigative journalism have moved primarily to the Internet, with many excellent business and economy, sports, information technology, and cultural websites, as well as websites with dedicated coverage of local issues and affairs in several cities and townships outside of the capital of Skopje.



Investigative journalism, panelists observed, has largely been expelled from mainstream media and has moved to the online realm, where several fine operations exist, thanks to foreign assistance and funding. Panelists did note the tendency to declare most long-form reporting to be investigative journalism. “Some of the so-called investigative journalism still leaves much to be desired in terms of quality,” said Biljana Bejkova, a journalist and public relations expert with the NGO Infocenter—an organization that offers public relations consultations and advice to civil society organizations.

Bloggers and citizen journalists have expanded their focus from just commentary and opinions on current political or economic issues and affairs, to providing, for example, some excellent coverage, especially through social networks of the Colorful Revolution protests.

### OBJECTIVE 3: PLURALITY OF NEWS

Score: 1.61

The Macedonian media market has been oversaturated and congested for years, so it does offer a multitude of different outlets. Unfortunately, numerical pluralism never translated into true media pluralism of opinions and positions. Overall, the media represent the variety of political views and opinions in the country, but the government has managed to establish, through political pressure and economic incentives, relatively firm control over most influential major broadcast media. Views and positions critical to the government have been pushed mostly online. All pro-government media seem to have their news written or produced in a single center, with many people suspecting that the center is located inside the office of the prime minister.

While surveys show that more than two-thirds of the population now use mobile devices as their primary access point to the Internet and other information, media are slow to take into consideration the possibilities mobile technologies offer and what they can do to better serve a huge audience. In line with global trends, the role of social media and social networks as providers or facilitators of news and information is constantly growing.

In general, prices of all services—cable television, mobile telephony, broadband Internet—have adapted to the purchasing power of Macedonian citizens and are cheap compared with the prices of similar services abroad. On average, cable operators offer a package of about 60 television channels, telephone service, and fairly fast broadband Internet for about \$15 per month. There are no systemic or legal obstacles for access to any type of media, although one panelist noted that Albanian and Kosovar newspapers are still not available on

Macedonian newsstands. “I don’t really know why. It used to be that there were some administrative problems—problems with the collection of customs dues. I don’t know if that was resolved or not, but the fact is that Albanian language newspapers from Albania are not available on the newsstands,” said Petrit Saracini, a journalist and activist from Civil Media. However, the government does not filter foreign websites, except for online betting sites.

The urban-rural divide remains, however, and citizens living in remote rural and mountainous areas can access only a limited number of television stations that air through the digital terrestrial multiplex, most of which have strongly pro-government positions and biases. Community media are nonexistent, with the exception of three student radios working under the auspices of three state universities, but they hardly function in line with standards applicable to nonprofit and community media.

During the 100 days before the elections, in line with political agreements brokered by the EU and the United States, the opposition appoints the editor of news and information programs at the public service broadcaster. This has brought some improvement to the way public service presents different political views and opinions. Those changes, however, did not come without strong resistance from the staff of MRT’s editorial office. Because of the sustained efforts of the government to fill all positions—editorial and reporting—with loyal members and supporters of the ruling party, many people at the public service broadcaster feel that their main task is to protect the interests of the state and government and not to tend to the interests of the public.

Panelists said such an ad hoc solution is not really a solution, and the public service broadcaster needs systemic and

### 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.

lasting solutions to help curb the pro-government bias. “The monitoring of the campaign shows that inconsistencies and problems were very much present in the representation of different actors in the political spectrum. Therefore, such ad hoc solutions don’t truly move us toward an increase in pluralism in the public broadcasting service’s programs,” Bejkova said. The major difference in the style or content of news depends primarily on the political affiliation of the editorial office, and in that sense—apart from the 100-day period before the elections—the public broadcaster is not an exception.

There are three news agencies working in Macedonia, each with different capacities for collecting and distributing news. Macedonian Information Agency, the official news outlet, is not seen as independent. Rather, it is perceived as an important cog of government public relations efforts. It does have the greatest technical capacity in terms of personnel, and most media subscribe to its services. The two independent news outlets, Makfax and Meta, function more like regular news sites. The capacity of the media to afford the services of news outlets differs: national television networks are the most likely to use these wire services, while smaller online media rarely have sufficient funds. One problem, panelists said, is that existing news agencies are focused on text and do not offer video or photographic service.

Private media typically produce their own news and information, depending on their capacities, particularly the sizes of their editorial offices and newsrooms. Again, and this is especially evident with pro-government media, part of their national politics coverage is produced, or at least dictated, by a single entity and then the footage or materials are redistributed to the media to broadcast or publish.

Ownership of broadcast media is strictly regulated, and a broadcast regulatory body maintains an official registry that lists the names of the owners. This does not prevent hidden ownership through proxies: the real ownership of many media is a matter of speculation to the public. One outstanding issue with media ownership is that companies and businesspeople with very diverse portfolios own most of the influential national television networks and cable television stations, and broadcasting is not their main business. In today’s unsustainable market, owners use their broadcast media primarily to support their other businesses and often meddle in editorial policies, even to a micromanagement level, to prevent reporting that could jeopardize other ventures or opportunities to win a lucrative government contract.

Ownership of online media is not regulated in any way or fashion, and investors tied to known tax havens throughout the world established many of the pro-government websites. One investigative unit, Mediapedia, has tied, through laborious research and investigation, the ownership of several

“I don’t really know why. It used to be that there were some administrative problems—problems with the collection of customs dues. I don’t know if that was resolved or not, but the fact is that Albanian language newspapers from Albania are not available on the newsstands,” said Petrit Saracini, a journalist and activist from Civil Media.

pro-government websites to bank accounts in Belize belonging to people with strong ties with the ruling party. Journalists who lost their positions in mainstream legacy media for political or economic reasons established a large number of online news sites. Print media also suffers from concentration in ownership: out of the six Macedonian-language daily newspapers, a single publishing company owns three.

Because of the political crisis, prolonged protest campaigns, and efforts to resolve the crisis, media have largely focused on national and political topics. Local issues and affairs are covered less extensively, and financial concerns have pushed most media to seriously downsize their networks of local correspondents. Nikolić said, “It is unacceptable, really, that the public service broadcaster has not had a local correspondent from Kumanovo for more than 10 years, but there it is.”

Media and broadcasters rarely send journalists to cover important events abroad, even in neighboring countries, instead relying on international newswires to cover foreign events and international affairs. There are some exceptions: TV Nova sent a reporting team to cover the U.S. presidential elections. Overseas correspondent networks are nonexistent, and even the public broadcasting service relies on public servants, such as the staff of Macedonian diplomatic representative offices abroad, to fill the role of correspondents and reporters.

National terrestrial television and networks have set quotas of music—in Macedonian or in the languages of other communities living in Macedonia—that they have to air weekly. In September 2016, the Macedonian Music Copyrights Society, also known as ZAMP, in protest of the prolonged pressure by the Ministry of Culture to cut its fees, introduced a total ban, prohibiting Macedonian radio and television broadcasters from airing music produced or performed by its members. Other collective copyright protection associations from the region (Serbia, Montenegro, Bosnia, Croatia) joined the ban in solidarity with ZAMP. The media protested, because the ban impedes their ability to meet the legal quotas of Macedonian music and makes

them vulnerable to possible sanctions from the regulatory body. The situation remained unresolved and the ban has proceeded into 2017.

## OBJECTIVE 4: BUSINESS MANAGEMENT

Score: 1.26

Most broadcast media are part of greater corporations with diverse business interests. All decisions regarding operational planning, investments, and human resources, as well as how those media fit in the greater structure, are made at a higher corporate level. Only the biggest mainstream media have the capacity to hire marketing or advertising experts, or to set up marketing and advertising departments. In smaller media with only a few employees, such as local broadcasters or online media, all those tasks may be divided between the members of the editorial staff or, more commonly, the founder/owner/ editor-in-chief manages advertising and administration. Panelists noted the especially worrying absence of any type of human resources operations. Several online media operate as nonprofits established by civil society organizations with the intent to access foreign funding—one of the few sources of income not controlled by politics.

The Macedonian advertising market is very limited and, since government advertising used to make up a huge chunk of total available advertising revenue, shrank further with the introduction of a moratorium on government advertising in mid-2015. Combined with the congested market, the situation is unsustainable. Despite the moratorium, panelists said the government manages to find ways to circumvent the ruling and continues to pump funds into friendly media. “Although the government doesn’t directly engage in media buying, it has managed to find a loophole to finance friendly media. There are six regional TV stations outside of the capital, with ownership tied, directly or indirectly, to the incumbent government. They don’t have to sell any advertising, and their operational costs are fully covered. Any advertising time they sell is profit for them,” Violeta Gligorovska, media analyst with the Metamorphosis Foundation, said.

While most media report that more than 90 percent of their revenue comes from advertising sales, a recent report prepared by the broadcast regulatory body shows only a handful of outlets reported a positive balance on their annual balance sheets for 2015. Outlets rely heavily on internal subsidies provided by owners, resulting in a negative effect on editorial independence, as owners attempt to prevent their media from reporting on issues that could undermine business relations or chances to win lucrative government contracts.

Last year, foreign donors invested heavily in the production of debate programs, the lack of which was detrimental for Macedonian democracy. The three student/university radio stations, the only stations that would fit the label of community media (although they are not registered as such), are financed by the respective higher education institutions they serve, which also actively sell advertising. In online media, technology and social media companies command nearly one-third of the total available digital advertising revenue. This is consistent with global trends.

The industrial output in the country is focused on “loan” manufacturing, semifinished products, and components for the automotive industry and mining and mineral resource exploitation—all products that are not sold on the domestic market or do not require advertising because they are produced for a known buyer. Among Macedonian companies, food and dairy companies and travel and tourism services are the leading advertisers. Overall, the leading advertisers consist mainly of foreign-owned telecommunications companies, car dealers, and pharmaceutical and personal hygiene manufacturers. Agencies, mainly local branches of major regional or international advertising agencies, dominate the market. The prices for advertising time and space are low and dictated by the agencies, but the media have played a role in cutting down the prices. Although elections are usually a great earning opportunity because of political advertising, official price lists submitted by the broadcasters to the State Election Commission were even lower than in 2014. Prices were an average \$1.40 per second of advertising time (the highest rate being set at approximately \$2.20 and the lowest at \$0.80).

Political concerns exert a great influence on the advertising market, because editorial policies critical of the government can mean that advertisers that plan to compete for government

### 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.

contracts would avoid those media. Local media find themselves in an especially difficult situation because most local companies do not feel the need to advertise, and they get only a fraction of national campaigns' budgets.

Most advertisements are professionally produced, especially the campaigns of international corporations present in the Macedonian market. However, Macedonian advertising companies are more than competent, and several of them have won important international awards for their advertising campaigns.

Broadcast media must adhere to strict limits on the amount of advertising time they can sell, which is set by law as 12 minutes per every real hour of broadcast. The limit for the public service broadcaster is eight minutes per real hour of broadcast, and it cannot sell advertising during prime-time hours (5:00 pm to 9:00 pm for TV and 9:00 am to 2:00 pm for radio). Selling advertising during newscasts is prohibited. Because people are so eager to hear news on the government's positions and policies in the current climate, television stations are not cutting news or informational programs simply to secure more advertising time. Newspapers dedicate about a quarter of available space to advertising. The three nonprofit student radio stations sell advertising, to the dismay of the commercial radio stations.

There is no official system of subsidies to purchase printing paper or equipment, apart from a government program to subsidize the production of domestic drama or documentary series/serials or made-for-television films. Panelists voiced several objections to that program, saying the supported programs are of low quality, and the commission that allocates the money is too unqualified in content production to gauge production-worthy material.

Because the government dictates, through "client" relations or by political pressure, the spending of advertising budgets, market research and planning seem unnecessary. Outlets themselves approach advertising agencies with total numbers of audiences, and few of the mainstream media outlets pay attention to the demographic data provided by the people-meters system. Agencies try to apply market research methods and targeted advertising for websites, mainly apolitical ones.

The panelists said while media may try to approach everything professionally, ultimately, advertisers' decisions about where to buy advertising space or time are motivated by political, not economic, reasons. "The whole thing is turned on its head. We could say that there are strategic plans in place and strategic goals. The goal, however, is to get the money from the budget, from public coffers. In the whole affair, the interests of the audience or the public are irrelevant; therefore, market research activities prove to be irrelevant, too," Babunski said.

The law requires print media to publish their circulations in their mastheads. They are not required to give their sold circulation and instead offer print circulation. Media owners of daily newspapers do not release the numbers of copies sold, and there is no independent self-regulatory body that would keep and release the data on newspapers' circulation. Panelists believe this confirms the suspicions that sales of newspapers have dropped below sustainable levels.

For the second year in a row, there were no official broadcast ratings figures, because the joint industry committee, established in 2014, has yet to sign the deal with the selected ratings company (AGB Nielsen). The broadcast regulatory body publishes regular quarterly and annual reports on the reach and ratings of broadcasters based on data provided by Nielsen. However, Nielsen faces accusations that the company rigs the figures on demand to misrepresent the ratings of individual broadcasters. Despite several attempts, there remains no official way to measure Internet traffic. Advertising agencies rely on Google Analytics data.

## OBJECTIVE 5: SUPPORTING INSTITUTIONS

Score: 2.17

There are several media trade associations in Macedonia: the Macedonian Media Association (MMA), a group established under the auspices of the Macedonian Chamber of Commerce, which brings together the five national DVB-T broadcasters; the Association of Private Media of Macedonia (known by the local acronym ZPMM) represents the privately owned local and regional media; and the Association of Macedonian Internet Portals (AMIP), which groups pro-government Internet portals. AMIP was formed in 2013 with the specific goal of endorsing the regulation of online media proposed by the government and has been inactive since its inception.

Of the three, only MMA, whose members make up the largest and most influential media in Macedonia, has power to negotiate with the government and promote the interests of its members. While ZPMM is active, regularly offering initiatives for issues concerning the media, it possesses little negotiating power, and the government largely ignores it. Media owners are not invested in the work of associations, and the organizations are only able to stay active with the continued influx of donor money. The Association of Private Electronic Media of Macedonia exemplifies this problem. While they still exist on paper and have not been officially disbanded, they have been dormant for the 10 years after the grant money was spent. Panelists said none of the current associations work or cooperate with any international organization.



## 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 Association of Journalists of Macedonia (AJM) is the oldest and most active professional association of journalists in the country and, together with the Independent Trade Union of Journalists of Macedonia (known by the local acronym SSNM), fights for the advancement of professional and working standards, the elevation of journalists' social status, and the improvement of the political situation in Macedonia. AJM and SSNM are partners with the European Federation of Journalists and the International Federation of Journalists. Although AJM and SSNM collect membership fees, their activities largely depend on the availability of foreign funding. Another group, first formed in 2001 by journalists not satisfied with the work of AJM, the Macedonian Association of Journalists, is now composed of pro-government journalists with the specific goal to counteract the work of AJM. In 2016, rumors floated around that the ruling party was working to create a trade union of journalists of its own to support pro-government media.

A number of NGOs work in the media sector and cover various aspects of its functioning. The Macedonian Institute for the Media works to advance the standards of professional journalism and training. The Media Development Center focuses on media legislation and media policy, monitors the implementation of media legislation, and, in cooperation with foreign partners, provides free legal assistance and in-court representation for journalists sued in defamation cases or prosecuted for their reporting. Several other organizations are active in areas of media consultancy and research, including ProMedia; the Metamorphosis Foundation, which focuses on Internet and online freedom; and the Center for Civil Communications, which defends freedom of access to public information. The NGO Infocenter and Helsinki Committee for Human Rights both support watchdog and monitoring efforts, and several organizations work to prevent hate speech. Most NGOs working in media collaborate to draft and present

recommendations, in line with *The Priebe Report*, on necessary reforms and interventions in the media system and legislation.

Panelists said various NGOs and civil society organizations have had a positive effect on media freedoms and freedom of expression. "These organizations are among the most outspoken and loudest defenders and advocates for freedom of expression and freedom of media. They are even more outspoken advocates for freedom of media than the media themselves," Babunski said. However, in the context of both the political and funding crises, the media also view NGOs as competition for international funding. Media outlets believe they should get priority in funding because they are the strongest barrier against authoritarian rule. With the exception of Štip-based Media Plus, most associations are based in the capital city of Skopje.

Several higher education institutions offer degrees in journalism or related fields, such as communications studies. In general, the journalism programs at state universities in Skopje, Tetovo, and Štip are known for producing undertrained journalists with little practical hands-on skills or knowledge of how newsrooms work. They focus on theory with little practical training. The School of Journalism and Public Relations and its affiliate, the Institute for Communication Studies, offer both undergraduate and graduate programs in journalism and media. Because the public standing of journalism is so low, young people have very little interest in studying or entering the profession. The School of Journalism, for example, has not enrolled new students for several academic years in a row.

Short-term trainings are available only on an *ad hoc* basis, usually provided by NGOs that have managed to secure funding and fit training workshops or seminars for journalists working on their projects. Panelists noted that such programs do not always fit media outlets' priorities, but rather the priorities and agendas of the organizations that prepare them. The U.S. Embassy also offers several programs for study visits and short education programs in the U.S., most of which do not charge any participation fee. Some donor organizations also have limited funds to cover fees for journalists to participate in training programs abroad.

In-house or on-the-job training is almost nonexistent, although some organizations, most notably the School of Journalism and Public Relations, offer custom training programs on demand that are tailored to meet the needs of the media that commission them. However, media owners are not prepared to invest money and resources in training, arguing that journalists change employers frequently. In general, journalists are left to fend for themselves and approach organizations that offer short-term trainings on their own. "I believe the reason existing training opportunities are refused is because of the newsrooms. First, some journalists think they know too much already, and

there is nothing new they can learn. Second, some media can't afford to give a journalist a day off to go to a training, because there would be no one to replace him or her and produce the news for that day," said Saracini. Some mainstream media outlets, such as Macedonian Radio and Nova Makedonija, had internal schools that produced successful journalists. Unfortunately, those schools have since closed.

There are no restrictions on the import of materials or equipment needed for media production. Recording equipment and editing software is increasingly accessible and affordable, thanks to rapid technological progress and the advancement of digital technology. There are enough printing companies to cover the needs of the market, and most dailies have learned that the best way to avoid possible refusal to be printed is to invest in printing facilities of their own.

Distribution of print media is not centralized, and all publishers have their own fleets of vehicles. Also, while there is no actual monopoly in the technical sense, the largest publishing company in the country, Media Print Macedonia, owns the biggest network of newsstands. Panelists noted one major supermarket chain, Tinex, refuses to carry certain publications on political grounds.

In terms of broadcast media, a single telecommunications company operates the two commercial multiplexes. "If that company decided to close its Macedonian operations, pack up, and leave the country, then there would be no one to distribute the signal of the [DVB-T] broadcasters," Gligorovska said. Cable television broadcasters face the problem of the inexistence of a must-carry provision in the Law on Audio and Audiovisual Media Services, leaving them at the mercy of cable operators who charge what respective local markets can bear to carry their programming services. Panelists also noted cable operators often refuse to carry individual broadcasters, especially Albanian language channels in Eastern Macedonia, under the pretext that there are very few Albanian speakers in that part of the country.

Macedonia has a good broadband Internet infrastructure, and the latest surveys show Internet penetration figures hovering at 65 percent. Furthermore, the penetration of mobile telephony has increased significantly, with surveys indicating that more than 40 percent of citizens are covered. For many Macedonians, mobile devices are their main channel to access the Internet. Media have not yet adapted to the increasing importance of mobile technology both in terms of specialized contents and as a source of advertising revenue. Panelists have not noticed any attempts by the state to filter websites or meddle in the registration of websites and news portals.

## List of Panel Participants

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

**Žarko Jordanoski**, editor and journalist, *Sloboden pečat*, Skopje

**Vasko Maglešov**, journalist, TV 21, Skopje

**Violeta Gligorovska**, media analyst, Metamorphosis Foundation, Skopje

**Klime Babunski**, media analyst and researcher, ProMedia, Skopje

**Vesna Krsteva**, editor-in-chief, Kanal 77 Radio, Štip

**Petrit Saracini**, journalist and activist, *Civil Media*, Skopje

**Biljana Bejkova**, journalist and public relations expert, Infocenter, Skopje

**Gordana Duvnjak**, editor, *Utrinski vesnik*, Skopje

**Suzana Nikolić**, owner and editor-in-chief, Kumanovonews.com; national media correspondent, Kumanovo

**Dejan Andonović**, editor-in-chief, Radio Slobodna Makedonija, Skopje

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

**Ubavka Janevska**, owner and editor, Duma.mk; national media correspondent, Veles

**Nenad Ristovski**, digital advertising specialist, Publicis Macedonia, Skopje

**Marina Tuneva**, executive director, Council of Media Ethics of Macedonia, Skopje

**Arta Tahiri**, journalist, political talk-show host, Rruga Drejt, AlsatM TV, Skopje

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