

MACEDONIA



MEDIA SUSTAINABILITY INDEX

2018

Tracking Development
of Sustainable
Independent Media
Around the World



MACEDONIA

AT A GLANCE

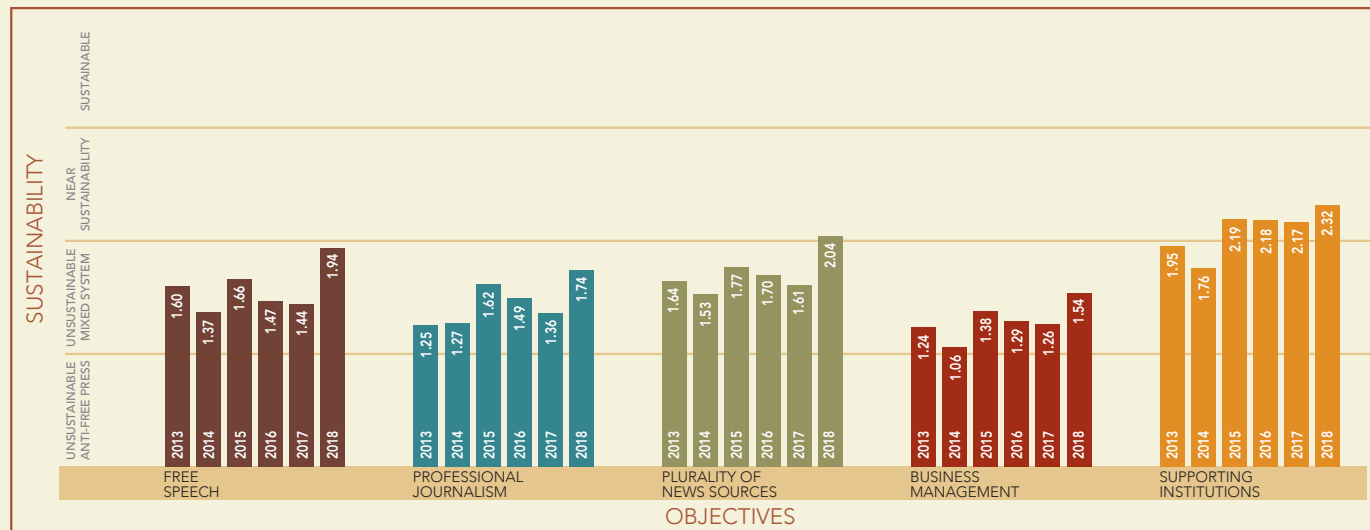
GENERAL

- **Population:** 2,103,721 (July 2017 est. CIA World Factbook)
- **Capital city:** Skopje
- **Ethnic groups (% of population):** Macedonian 64.2%, Albanian 25.2%, Turkish 3.9%, Romani 2.7%, Serb 1.8%, other 2.2% (CIA World Factbook, 2002 est.)
- **Religions (% of population):** Macedonian Orthodox 64.8%, Muslim 33.3%, other Christian 0.4%, other and unspecified 1.5% (CIA World Factbook, 2002 est.)
- **Languages (% of population):** Macedonian (official) 66.5%, Albanian 25.1%, Turkish 3.5%, Romani 1.9%, Serbian 1.2%, other 1.8% (CIA World Factbook, 2002 est.)
- **GNI (2016 - Atlas):** \$10.9 billion (World Bank Development Indicators, 2016)
- **GNI per capita (2016 - PPP):** \$4,980 (World Bank Development Indicators, 2016)
- **Literacy rate:** 97.8% (male 98.8%, female 96.8%) (CIA World Factbook, 2014 est.)
- **President or top authority:** President Gjorge Ivanov (since May 12, 2009)

MEDIA-SPECIFIC

- **Number of active print outlets, radio stations, television stations, Internet news portals:** Print Outlets: Five daily newspapers, two weekly newsmagazines, 11 other periodicals; Broadcasting: One (radio and television) with five television channels and three radio channels; Television Stations: Five national DVB-T broadcasters, four national cable television broadcasters; five national satellite television broadcasters; 21 DVB-T regional television broadcasters; 22 local cable television broadcasters; Radio Stations: Four national radio stations; 17 regional radio stations; 48 local radio stations; one nonprofit (student) radio station; Internet News Portals: Between 80 and 100 news and opinion sites of some importance
- **Newspaper circulation statistics:** Sloboden pecat daily: 14,200; Vecer daily: 7,900; Nova Makedonija daily: 7,000; Koha daily: 5,000 (All figures are for print circulation; data on sold circulation are not available.)
- **Broadcast ratings:** SITEL: 24.24%; Kanal 5: 13.07%; Alsat M: 5.44%; TELMA: 3.57%; MRT1 (PBS): 2.80%; 24 VESTI: 2.73%; ALFA: 2.33%
- **News agencies:** Macedonian Information Agency (MIA), Makfax, META
- **Annual advertising revenue in media sector:** No media-specific data are available. Presented data are estimates of the total advertising spending by advertising industry insiders. Total advertising spending: 35.6 million EUR; Television: 66% (23.4 million EUR); Radio: 8% (2.8 million EUR); Print: 4% (1.4 million EUR); Digital: 10% (3.5 million EUR); Out of Home: 13% (4.5 million EUR)

MEDIA SUSTAINABILITY INDEX: MACEDONIA



SCORE KEY

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>



Improvement in all objectives this year for Macedonia's media sector can be attributed to political changes that prioritize media in democratic reforms. These factors have contributed to raising the overall score from 1.57 to 1.91. Although there is still distrust in the media, many citizens have access to a variety of news sources across platforms and mobile use is high, therefore, the plurality of news objective crossed over into the near sustainable category at 2.04 for the first time since 2008. Despite challenges that still exist such as the weak economy, 2017 was nevertheless one of renewed optimism about the future of media and journalism in the country.

Macedonia began 2017 with huge hopes. The year was expected to be one of new beginnings and a return to some semblance of normalcy after the prolonged authoritarian and kleptocratic rule of the previous government. Although the previous nationalist-populist government of the Internal Macedonian Revolutionary Organization – Democratic Party for Macedonian National Unity (VMRO-DPMNE) formally lost the elections in December 2016, the actual turning point came on April 27, 2017, after the failed coup d'état by the former ruling party. The mob stormed the parliament, which had just voted in a new speaker, and attacked several people, including a number of journalists. The new ruling coalition, led by the social-democrat party SDSM, rode the wave of change and won local elections in October 2017 in a landslide, leaving just a handful of smaller, rural municipalities to the opposition.

The new government was voted in on June 1 and immediately presented its plan for urgent reforms prescribed in the so-called Priebe Report, in which the European Commission's Expert Group addresses systemic rule of law issues, and the European Union (EU)'s Urgent Democratic Reforms documents, with media ranking high on the list of priorities. After several months of relatively inclusive public discussions and solicitations of comments and proposals from stakeholders, the Ministry of Information Society and Administration announced on December 26 that a final draft was prepared and would be sent to the EU for its expert opinion before being put into parliamentary procedure for adoption. The draft focuses on the composition of the council of the audiovisual regulatory body and the public service broadcaster; it hopes to relieve

them from the existing political influences and make them more independent.

The first concrete step was to abolish the broadcasting fee and fully finance Macedonian Radio and Television (MRT), the public broadcasting service (PBS), through the state budget. Some mechanisms are proposed to prevent the government from using its budgetary power to pressure and control PBS, but few people believe this will lead to a truly independent PBS. Of greater concern is that the MRT will remain underfinanced and unable to perform all its functions as prescribed by its remit, the law, and international standards.

The Macedonian economy is in a state of perennial recovery, with growth rates well below the five to six percent per year that is widely seen as necessary for progress. Despite this weak economy, it is still expected to somehow sustain the overcrowded media market. The new government decided to stop all media buying activities, putting a new strain on the media, many of which relied strongly on public funding redirected to them by the former government in the form of state advertising. Combined with the loss of local administrations' promotion budgets for public service campaigns, the lack of revenue forced a number of media to fold, including the leading print media publisher MPM, which boasted three daily newspapers, and several regional digital terrestrial broadcasters, which were established with the specific purpose of promoting former government policies.

Despite these challenges, 2017 was nevertheless one of renewed optimism about the future of media and journalism in the country, as evidenced by the scores that, after several years of plummeting, recovered by an unexpected margin over the past year.

**OBJECTIVE 1:
FREEDOM OF
SPEECH**

1.94

As in previous years, freedom of expression and media freedom remained hot topics, especially with the public discussions and debate on the necessary changes to practices and approaches, both regulatory and self-regulatory. Much of the discussion consists of efforts to balance the need to regulate some aspects of media, especially the business side, and keep at bay any attempts—in spite of an evident social need, considering past abuses—to introduce at least some regulations for professional reporting.

Panelists agreed that Macedonia has always had legislation in line with international standards for freedom of expression and media freedom. The legislation has also traditionally been very liberal in allowing, on paper at least, media outlets and journalists to set their editorial agendas and policies. However, it only pays lip-service to public service concerns and lacks proper mechanisms to ensure that media fulfill those public service obligations. Such legislation has not always been best suited to the political situation in Macedonia, and panelists were unanimous that implementation has always been sub-par and politically motivated, with abuses in both the media and regulatory bodies. “The system is there, and it is properly European. The practice and implementation have frequently depended on local or national policies, as defined by political parties,” said Marjan Nikolovski, a broadcast journalist with Sitel TV.

Licensing procedures are in place for broadcast media. Other media, including print and online, are not subject to licensing, but the Agency for Audio and Audiovisual Media Services keeps a register of

print media and has some supervision and oversight authority. A discussion about the need to include online media in a system of registration, similar to the one that applies to print, re-emerges periodically. The media community is divided into proponents, who cite the existing chaos and the need to put some order in the sector, and opponents, who adamantly believe online media should be left outside any regulatory framework.

Panelists agreed that the existing licensing and/or registration procedures have not been used to prevent anybody from setting up a print or broadcast outlet. They also noted that the liberal approach to licensing has created an overcrowded market that is the root of many existing problems, yet nobody seems to be prepared to use licensing to do anything about it. However, according to panelists, political interests do play a role in licensing policies. “We have had a case where, before the elections, a regional TV station from the allocation region D5 gets a regional license for region D8 because a political party needs it. You shouldn’t transfer a medium from one region to another based on which elections are being contested,” said Mevaip Abdiu, the owner and general manager of the regional station Koha TV.

Another issue panelists noted is the current composition of the regulatory body. Though it has acted more independently in the periods before and after the December 2016 elections, it remains politically dominated. In Macedonia’s media reform effort, proposed legislative changes include making the Council of the Agency for Audio and Audiovisual Media Services a professional and expert body, ensuring that it is formally detached from any political influence.

The law stipulates that market entry is free and fair for all media, and the only limitations are the somewhat strict provisions to prevent media

concentration and the aim to provide for greater pluralism in media ownership. The “one owner – one television channel” policy has prevented general-format broadcasters from branching into specialized channels (for example, film, sports, entertainment). Investors applying for terrestrial broadcasting licenses also need to provide bank guarantees with the application.

The advertising market is small and shrinking, yet still remains oversaturated by several degrees of magnitude, making the media vulnerable to economic pressure and influence. There was some movement in 2017, however. MPM, the largest

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.

publishing company, filed for bankruptcy and shut down, resulting in the elimination of three daily newspapers. Several periodicals and regional newspapers also went out of business. Those shuttered outlets were primarily media close to the former ruling party and heavily dependent on the elaborate system of de facto public subsidies the government used to finance their operations. In the last quarter of 2017, one new daily emerged, but like the remaining daily and weekly newspapers, its long-term prospects for survival are weak.

Tax regulations are impartial and objective, and media companies are not treated differently from any other businesses, though talks began in 2017 about establishing some sort of assistance for the media. In general, the creation of a system of subsidies, or some form of tax relief or privileged taxation rates, is on the table. Another issue is the right to use music; media outlets must pay four percent of gross income for the small rights to broadcast songs.

The Association of Journalists of Macedonia (AJM) reported 20 attacks and attempts to prevent journalists and media professionals from performing their professional duties in 2017. These threats took the form of verbal and physical assault, arbitrary detainment, and destruction of professional equipment and personal property. One especially egregious incident occurred during the April 27 storming of parliament, when the mob also attacked a number of journalists. Panelists said seeming impunity for such attacks and a lack response from authorities remain a problem in Macedonia. Dragan Sekulovski, the executive director of AJM, said, "Out of the 54 cases of attacks on journalists we have registered over the past several years, just 10 were fully investigated. Five of those are not in criminal courts, and another five were processed by civil courts." Panelists did note, however, the readiness of

fellow journalists, human-rights defenders, and civil society activists to react strongly and immediately to such incidents. Other panelists added that the situation with local media is far more serious, but rarely gets sufficient publicity or support from professional associations.

"The government approaches FOIA [Freedom of Information Act] issues as if they were public-relations matters," said Klime Babunski, a media analyst and scholar. "All institutions should be instructed to post all information on their websites. The government could start with the actual agendas and information that will be reviewed in government sessions."

Like other facets of media, the legislation regulating the work and operations of public broadcaster MRT is subject to overhaul during the media reform process. The first major change was already made in 2017, with the removal of the broadcasting fee, which was charged on all households and business that own a television set. The PBS will now be financed from the state budget, as a fixed percentage of the realized budget from the previous year. In practice, this means the PBS, which has traditionally been underfinanced, will now receive even less money. This insufficient amount of funding will make it nearly impossible for the broadcaster to perform the many functions listed in its remit and on par with international standards. Also, there are legitimate concerns that the new financing model may further undermine its editorial independence; panelists fear that political concerns and favors may continue to play a decisive role in

the selection and appointment of top management and editorial staff. Legal changes are also planned for the composition of the PBS's Programming Council, which has so far been politically dominated, to make it a more professional, expert body. That move may come, however, at the expense of its representative nature. Panelists also observed that the PBS's staff is aging and increasingly conservative and that no real changes will be possible without a major overhaul of the PBS's human resources base.

The 2012 Law on Civil Liability for Defamation provides special treatment for journalists and media professionals and limits the compensation/ fine amounts they can be ordered to pay (\$210 for the journalist; \$10,600 for the editor; and \$16,000 for the publisher). Although such fines remain a deterrent for the impoverished media and journalists, defamation is now less of an issue in Macedonia, since powerful political and economic actors cannot use threats of defamation to pressure journalists. At the end of 2017, the Secretary General filed 10 lawsuits against journalists, primarily those from online media. The courts generally treat online media differently and do not recognize their journalistic status, because online media are not explicitly named in the general law on media.

Macedonian freedom of information legislation is widely considered good. Such laws have been abused in the past, usually by officials stalling or delaying responding to information requests, and there is a lack of procedures or instruments to force officials to respond to them. The situation at the local level is far worse, panelists said, with journalists from local media unable to secure information, particularly from national authorities. In general, the government is keen on controlling all information released to the public. The new government has been a vocal supporter of transparency, appointing a minister to lead transparency and accountability

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efforts, although the long-term impact remains to be seen. Panelists said that in addition to declarations of intent and goodwill, the government should take a proactive role and start making all information available through its websites. "The government approaches FOIA [Freedom of Information Act] issues as if they were public-relations matters," said Klime Babunski, a media analyst and scholar. "All institutions should be instructed to post all information on their websites. The government could start with the actual agendas and information that will be reviewed in government sessions."

There are no legal or practical restrictions to the access of local and international news and news sources, and panelists have seen no efforts to filter online news sites. The law guarantees freedom of retransmission of foreign channels for cable and IPTV operators. Foreign channels may be blocked only if they offer programs that contain hate speech or call for violent overthrow of constitutional order. Smaller media rely on foreign Internet news sites as a major source of international news and infotainment, with little regard for intellectual property and copyrights. Many outlets apply the "fair use" doctrine, although that concept is not part of European legal tradition.

Entry into the journalism profession is completely open and without restriction. Periodically, however, there are renewed calls from people within the profession to create some sort of official journalistic license. Bloggers and citizen journalists are seen primarily as unwanted and unqualified competition by more formal and traditional journalists. The lines between professional and citizen journalists continue to be further blurred by the prevalence of social networks. Some ethnic communities, especially the Roma, remain seriously underrepresented in national mainstream media.

A regular press card issued by an editorial

office or by AJM is generally sufficient to secure access to events or press conferences; only a handful of institutions, including the parliament, issue their own special credentials. Panelists noted that local reporters face difficulties securing credentials from central institutions. Foreign correspondents and journalists are subject to special registration and receive credentials to work in Macedonia by the Ministry of Foreign Affairs.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

1.74

Political divisions remain as clear-cut as before; they are evident in some reporting, particularly in political talk shows and debate-style programs. With the change of government, the leading national television broadcasters quickly turned their editorial policies in favor of the new social-democratic government, after previously supporting the conservative party during its years in power. The media remained focused on the former government, intently following the judicial actions taken against former officials for their alleged abuses and corruption.

Panelists said that in 2017 journalists and media were expected to fulfill the requests of various political parties. "The media were used as part of the political machinery, especially in the period before and after elections," said Marina Tuneva, who sits on the self-regulatory Council for Media Ethics in Macedonia. "They were subject to strong pressure from political parties and were used in political fights."

The media and journalists make an effort to fact-check. However, the difficult financial situation

means newsrooms cannot invest in proper fact-checking departments. Shrinking newsrooms have led to an ever-growing reliance on repeating verbatim official statements and press releases. In Macedonia, balance is primarily seen as a matter of dedicating equal time to all stakeholders, not necessarily approaching every side of a story with equal and evenhanded treatment. However, unlike previous years, the media have made an effort to invite experts from all sides of the political spectrum for their panel- and debate-style political talk shows, an improvement from previous years. Online reporting is even more biased and partisan, with many news sites established for the specific purpose of serving as mouthpieces for party propaganda. Still, several online news sites, bolstered by foreign support, remain the last bastions of investigative journalism, which, as panelists note, has been largely exorcised from the pages and airwaves of traditional mainstream media.

Macedonian media, in general, lack internal self-regulatory practices, codes, style guides, or established editorial policies. A self-regulatory body at the industry level, the Media Ethics Council, was established in 2013; it deliberates and reviews complaints against media for violating the provisions of the International Federation of Journalists' (IFJ) principles and the AJM's Code of Ethics. The Code of Ethics was amended in 2017 to include new concepts and issues that have emerged with the advance of the digital age. The AJM's counterparts at the Macedonian Association of Journalists (MAN) have not declared any such set of principles. The Media Ethics Council makes an honest effort to increase its profile and standing in the media community and has made some advances in that area. However, some media organizations still distrust the council and question its capacity and credibility. There is also the general problem

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).

surrounding the effectiveness of self-regulation; many outlets simply choose to ignore the council's rulings and decisions or correct their actions and behavior. The general impression, however, is that accusations of unethical behavior are frequently unsubstantiated.

Journalists have no problems accepting gifts from major companies and corporations, usually as part of promotional campaigns for new products or services or offers to travel with government officials on visits abroad. Advertorial content, both commercial and political, has become requisite, to generate revenue and because shrinking newsrooms necessitate carrying entire press releases and statements from officials and institutions. The situation regarding plagiarism has improved, with the exception of international news. Still, it remains a substantial enough concern that the Trade

Union of Journalists spearheaded a legal program offering journalists and outlets legal assistance to defend intellectual property rights, including court representation for those who wish to seek justice and compensations in court. Because of a lack of resources, panelists admitted that many outlets see using foreign sources without consent or an agreement as necessary to provide international news. Outlets are unable to establish correspondents' networks, and few companies can afford to pay for proper newswire or agency services.

The Macedonian constitution bans censorship. Although freedom of media and expression has improved after the ouster of the previously authoritarian government, journalists still hesitate to cover the new government and its policies. Self-censorship remains a problem, in part because of the poor financial outlook. Media owners feel pressure to censor their own journalists, fearing critical reporting may undermine their other businesses, most of which depend on the lucrative government contracts. Low salaries, well below the national average, and job insecurity also contribute to the pervasive climate of self-censorship. "There is self-censorship, especially among journalists close to some political party, and it does cover whole media outlets, with censorship usually coming from the editors or owners," said Zarko Jordanovski, editor at the daily newspaper Sloboden pecat. The Law on Media allows journalists to resist requests to report in violation of professional standards or to refuse to sign articles that have been changed without his or her knowledge. So far, however, there were no sanctions against any editor for what panelists see as quite a common violation.

Key events and issues are covered, but the scope and depth of coverage depends largely on capacities of individual media, with a dominant focus on national politics. Smaller editorial offices

rely primarily on republishing and regurgitating reports published by outlets with the personnel and technical ability to provide more comprehensive coverage. Some media, including some legacy editorial offices, increasingly rely on social network and blogging sites to fill in their commentary and op-ed pages. Most citizens browse numerous news reports from different outlets to gain a better understanding of a story.

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As stated above, journalists' salaries are below the national average and certainly well below other professionals or civil servants. The average salary in broadcast media is about \$300 a month and even lower for other mediums, meaning salaries are barely sufficient to cover the minimum standard of living. Panelists generally agreed that journalists' salaries are below any level of propriety and decency. However, media and journalists that have secured some foreign funding, primarily investigative operations, receive much better salaries. Similarly, reporters and photojournalists that work as correspondents or stringers for foreign media or news agencies have a much better income. Panelists said, however, that the correlation between low wages and susceptibility to corruption is not very straightforward. "The situation is horrible. The salaries are low, especially in the smaller, local media. There is also a great difference in salaries

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paid to journalists and those given to their editors. We can't really say that those who are well paid are immune to corruption," said Biljana Bejkova, a journalist and civil society activist with Info-centre.

The labor market for media is quite active and dynamic, with personnel moving frequently between outlets. Higher salaries are frequently, although not exclusively, the main motivation for such moves. A large number of experienced journalists have officially left the profession, usually for better-paid positions in public relations or advertising, including the public relations departments of the new government and individual ministries.

The great number of broadcast, print, and online news sources allows citizens to get the news at the time and place of their preference. As a general rule, people tend to watch regularly the main newscasts aired by at least two television stations. Television is the most popular news source, but the Internet is rapidly closing the gap, with print media and radio lagging far behind. Unofficial estimates indicate that less than one-fifth of total programs are dedicated to news and information; political panels, debate-style shows, and talk shows are included in that category. The political crisis and its aftermath resulted in the emergence of several relatively popular political talk shows, some of them in prime time slots. However, prime time in general is dominated by reality programs, soap operas, and Turkish telenovelas. Print and especially online media also use trivia, entertainment, and sensationalist news, along with various other "clickbait" tactics, in an effort to maximize advertising revenue. Ultimately, panelists feel there is enough news and informational content in Macedonian media.

The biggest national broadcast and print media have solid technical capacities for gathering, producing, and distributing news. The majority of television broadcasters still air standard-definition

television, with only a handful moving to high-definition. There are outlets, however, especially among local broadcasters, which depend on old equipment with upgrades or new equipment well beyond their financial means. Local correspondents have it the worst, according to panelist Suzana Nikolic, the owner and editor of the local news site Kumanovonews.com and a correspondent for several national outlets. "We have no working conditions whatsoever," she explained. "We work from home; we have to use our own equipment, pay our own bills, and yet we have the lowest salaries in the chain." Online media, while benefiting from the cheap technological platform and availability of new handheld video and audio recording devices, remain stuck in the old paradigm inherited from print media and do not leverage, for example, multimedia techniques for their reporting. The number of online news sites moving to more multimedia content is on the rise, with these sites usually first expanding to video; however, podcasts remain underused. Specialized investigative journalism websites, benefiting from foreign donors' funding, use new forms of reporting, such as data journalism, regularly and with actual effect and impact.

As a major part of its mandate, the PBS leads the way in providing diverse and specialized programs. However, the shrinking size of newsrooms in commercial broadcast and print media means there is little room for specialization, and journalists are expected to cover whatever comes their way. The best these outlets can usually manage is to specialize in politics or economics as general categories of interest. Sports and culture remain fields of greater specialization in traditional media, although such departments have been reduced to bare-bones staffs. Specialized reporting has largely moved to the Internet, with several news sites dedicated to specific topics like business,

economics, the judiciary, IT, sports, and more.

The lack of investment in proper training and education also impedes specialization. There are a number of local news sites in townships and municipalities outside of the capital city of Skopje that offer local news or cover the wider region. However, panelists observed that investigative journalism has largely been dropped from mainstream media, due to an inability to finance investigative departments. It has moved to the online realm, where several fine operations exist thanks to foreign assistance and funding. Panelists also said there is a tendency to declare most long-form reporting to be investigative journalism. "There is some investigative journalism in Macedonian media, but usually [less] than one percent of all coverage," said Bejkova. "The quality of the nominally investigative reports, I'd rather not go into that, because there are many defects, as we noted in our surveys."

OBJECTIVE 3: PLURALITY OF NEWS

2.04

Of the plethora of sources for information at their disposal, Macedonian citizens routinely check two or more different media, often across different platforms—primarily television and online—to get a better understanding of events and developments and to get multiple viewpoints on those events and stories. In this way, Macedonians are greatly helped by the oversaturated and congested media market. However, the need to survey multiple sources is largely because of low confidence and distrust in the media, which are perceived to be biased toward a political party or perspective. Younger audiences in particular are following the trend of

their peers all over the world and are replacing traditional media with social networks, particularly Facebook. These platforms are rapidly becoming the main source of news for young people. According to a report by Macedonia's State Statistical Office in early 2017, mobile use is constantly growing, with mobile devices the main point of access to the Internet for 82 percent of regular users and in the 15-24 age group usage rises to well above 90 percent. In a poll commissioned by Foundation Metamorphosis in January 2017, 45 percent of respondents reported that they use the Internet daily for their news.

The numerical pluralism (according to the Registry of TV Broadcasters kept by the Agency for Audio and Audiovisual Media Services there are more than 70 television stations broadcasting in a market of about 560,000 households) has never translated into true media pluralism in terms of diversity of opinions and positions. Overall, the media represent a variety of political views and opinions in the country, but leading national broadcasters tend to be too close to and too supportive of the government, largely due to the lack of a sufficient advertising market to sustain them. "The media in general represent various views and positions, but you can't find pluralism in individual media," said Jordanovski. During its days in power, the current leading opposition party created and, panelists suspect, pumped a lot of public money into friendly media, which remain strongly supportive of its positions. Shrinking editorial offices also means that media increasingly rely on practices of so-called "churnalism," or copy-pasting press releases issued by political and economic entities without any critical or analytical approach.

All services—cable access, mobile telephony, and broadband Internet—come at prices adapted

to local purchasing power. Compared with similar services abroad, they are very inexpensive; for \$15, a person can get a cable access package of about 60 television channels, telephony, and fairly fast broadband Internet. Still, huge swaths of the population are impoverished and, even at low prices, cannot afford to access media.

There are no systemic or legal obstacles to access any type of media, although one panelist noted that Albanian and Kosovar newspapers are still not available on Macedonian newsstands. Newspapers from other neighboring countries are also challenging to get, except for print from the countries of the former Yugoslavia. Because international press is rather expensive for Macedonian citizens, the number of available titles is limited. Panelists have seen no cases of government filtering of foreign websites, with the exception of online betting sites.

The urban-rural divide remains, 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 are likely to have strong pro-government positions and biases. Community media in those regions is non-existent, with the exception of three student radio stations working under the auspices of three state universities. They hardly function in line with the standards applicable to nonprofit and community media. In 2017, a local Roma organization from Stip in eastern Macedonia filed an initiative for a "public call" for licensure for nonprofit radio station.¹ After a request for applications was published, the Roma organization chose not to apply.

¹ In Macedonia, entities interested in becoming a new broadcaster must respond to a public call; the regulatory body then selects an applicant to receive a permit for nine years.

The public service broadcaster, Macedonian Radio and Television, has traditionally been viewed by political parties as a perk that comes with winning elections and thus has been considered primarily part of the government's public-relations machine. Considering its remit, the PBS has always been underfinanced, with a large portion of its funding coming from the state budget. The new government has pledged to transform it into a true and independent PBS, but the decision to eliminate the nationally collected broadcasting fee (charged to all households and businesses that own a television set) and fully fund it by the state budget has raised serious doubts about the prospects of that plan.

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Panelists said the issue of the PBS's technical and editorial staff also needs to be addressed. Employees have been thoroughly indoctrinated by the former government and seem to be subservient to political centers of power. Because of the lack of funding, the focus at the PBS is primarily on its information and news programming, at the expense of the other segments of its mandate—entertainment and educational programming. It also largely neglects its role as the main incubator for quality feature and documentary programming or its role in the Macedonian cultural industry in general.

There are three news agencies working in Macedonia, each with different capacities to collect and distribute news. With new management at the helm, the Macedonian Information Agency (MIA), the official news agency, is making efforts toward greater independence from the government.

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.
- ▶ Independent broadcast media produce their own news programs.
- ▶ Citizens' access to domestic or international media is not restricted.
- ▶ Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- ▶ State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- ▶ A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.
- ▶ Independent news agencies gather and distribute news for print and broadcast media.
- ▶ Broadcast ratings, circulation figures, and Internet statistics are reliable.

Panelists noted it still lacks a number of services, including video services, which local media need. The two independent news agencies, Makfax and Meta, function more like regular news sites. Makfax changed ownership in 2017, and the new owners are reportedly interested in expanding into television. The media's capacity to afford the services of news agencies differs; national television networks are most able to use the services of news agencies, while smaller online outlets rarely have sufficient funds to purchase such services. One problem, panelists observed, is that existing news agencies focus on text and do not offer any video or photographic services. Panelists also said past governments have relied on practices that

undermine the work of the agencies. "At events organized by the government and its ministries, they will provide their own photographers and cameramen, and then post photos and footage for free use by the media," Sekulovski explained. "The problem is not only about finances and denying the agencies some income, but also that such materials may be very biased."

Private media all produce their own news and information, depending on their capacities and the size of their newsrooms. Most news content is similar, with any major differences in style or news content based primarily on the political affiliation of the editorial office. In that sense, the public broadcaster is no exception; it has traditionally been treated as a state apparatus and not a true public service broadcaster. Online media sites are also diverse. Those with substantial newsrooms, set up in a traditional newsroom structure, have their own production, while other online outlets rely on simply compiling materials published by other media. Panelists observed they do not even bother to correct spelling mistakes and typos, but rather copy entire articles, only sometimes giving attribution.

The ownership of broadcast media is strictly regulated, and there are legal provisions that prohibit media concentration. There is also a list of people who cannot own broadcast media because of political affiliations or other conflicts of interest. After the change in power, several outlets formally restored their true owners, transferring the titles from proxy owners who were used to protect them from liability under conflict-of-interest legislation. One outstanding issue with media ownership is that the majority of influential national television networks and cable television stations are owned by companies and businesspeople with diverse portfolios, and broadcasting is not their main business. In Macedonia's weak media market,

owners use their broadcast media primarily to support their other businesses or as leverage in efforts to secure important government contracts. As a result, they often meddle in editorial policies to prevent reporting that could jeopardize some of their other business ventures or chances to win a lucrative government tender.

Ownership of online media is not regulated, but, as noted earlier, there is discussion whether online media should be included in the regulations pertaining to print media, including the obligation of transparent ownership. According to panelists, the issue of some popular online news sites being owned by entities registered in known offshore tax havens has yet to be resolved. One daily has been sold to a Serbian publishing company, an industry leader with operations in almost every country in the former Yugoslavia.

Reporting remains focused on the national political scene, with a particular focus on judicial and other proceedings. Local issues and affairs are covered less extensively. Financial concerns have pushed most media to substantially downsize their networks of local correspondents. Nikolic said, "It is unacceptable that the public service broadcaster has not had a local correspondent from Kumanovo for more than 10 years." Minority-language media are present in areas with higher concentrations of speakers. As obligated by law, the public service broadcaster airs programs in nine languages, the highest number of in-country language services in Europe.

The coverage of important foreign events and international affairs relies almost exclusively on what is available from international newswires and agencies. Macedonian media and broadcasters rarely send journalists abroad, even to neighboring countries, to cover important events. An exception is made concerning official travel abroad by

government and state officials, who commonly take a group of Macedonian journalists with them. Panelists noted that often such selections are not made transparently or in line with publicly available criteria.

**OBJECTIVE 4:
BUSINESS
MANAGEMENT**

1.54

Management and decision-making practices largely depend on the type of media outlet. In general, most outlets operate in a small market with low purchasing power, a situation that forces them toward making compromises with their editorial policies.

Broadcast media, working in a highly regulated sector, must abide by both the general rules and regulations pertaining to all businesses in Macedonia as well as the specific regulations for the media. These media-specific rules include presenting reports on the ownership structure, financial reports with data on income generated from the performance of broadcasting activity, and information on ratings/share of audience to the regulatory body. Print media are required to publish their financial reports. Accounting and bookkeeping must be outsourced to an accredited accountant, as mandated by law.

Most broadcast media are part of larger corporate entities with diverse business interests. Decisions regarding operational planning, investments, and human resources are made at a higher corporate level, but decisions on editorial matters are also believed to be made by higher-ups. Owners have traditionally used their media outlets to support their other businesses, both in terms of dealing with competitors, often with harassment or

negative PR, and by using the media as leverage when applying for lucrative government contracts, which are particularly important in an economy dominated by public spending. Only the biggest mainstream media outlets have the capacity to hire marketing or advertising experts or set up marketing and advertising departments. Many online outlets were set up by journalists who have lost their jobs, either for economic or political reasons, and staffers usually multitask, serving as managers, editors, marketing and advertising specialists, and more. Several quality news sites operate as nonprofit entities, in order to secure funding available to civil society organizations from foreign donors. This funding is somewhat secure but, more importantly, it allows for editorial independence.

The Macedonian media market has not been spared the impacts of the digital revolution. The advertising market is shrinking and with the new government deciding to stop all forms of advertising, except on social media, is bound to dwindle even more. The government is also planning to rely solely on the PBS for its public service announcements. Estimates (there is no structured measurement of the advertising market) indicate the market has somewhat recovered compared with 2016, but the growth is almost exclusively in digital advertising. Global power players, particularly big tech companies like Google and Facebook, increasingly dominate the digital advertising segment and are currently estimated to account for 40–50 percent of all digital advertising spending. The hope that Macedonia just had to get rid of the former authoritarian government to restore order does not seem to be materializing.

The available advertising spending is not nearly enough for the overcrowded market. Although the market seems to have recovered slightly, thanks to growth of digital advertising spending, it is not robust

enough to support the hundreds of media outlets operating in a market of about 560,000 households. The pressure on management to secure as much advertising revenue as possible has some influence on the editorial policies. News programs are often the most-watched programs on television, resulting in broadcasters putting an emphasis on news and informational content as a means to attract a larger audience. However, the sale of advertising during newscasts is prohibited. According to an annual report on the state of the broadcasting market, prepared by the Agency for Audio and Audiovisual Services, most media report advertising income accounts for more than 90 percent of annual revenues. Nevertheless, the report also noted that the national market has reported a net loss across the board, with only a handful of media outlets reporting an actual profit. “If you look at the available analysis, 99 percent of their income comes from the sales of advertising space,” said the Media Development Centre’s Stojance Naumov. “There is no other income—nothing from sales of programs, branded merchandise, fees from cable operators. It all comes down to practically zero.” Naumov also hosts “Stadion,” a popular radio talk show.

Media have traditionally been forced to supplement their revenue from commercial advertising with other sources, including internal subsidies from the owners or government advertising. Some outlets are also part of corporations or companies with interests in advertising or marketing agencies. During the political crisis, the international donor community gave funds to help produce investigative and debate-/panel-style political programming, as well as some feature series and documentary programs. The elimination of government advertising has put considerable strain on the media, and a number of outlets have shut down, including the biggest

publishing company in the country (which printed three dailies), a number of periodicals, and several regional broadcasters. Sekulovski pointed out that there is almost a total absence of crowd-funding operations, including solicitations for readers' donations or subscriptions to online media.

Outsourced manufacturing, semi-finished products and components for the automotive industry, and mining and mineral resources exploitation remain the major contributors to the national industrial and economic output. Because those products are not really intended for the domestic market and have a known buyer, they do not require advertising. Foreign-owned telecommu-

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nications companies, car dealers, pharmaceutical companies, and domestic hygiene manufacturers are the leading advertisers overall. Among Macedonian companies, the food and dairy industry, along with travel and tourism services, are the leading advertisers. The advertising market is dominated by advertising agencies, most of which are local branches of major regional or international advertising agencies. "I don't think advertising agencies provide proper support to the advertising market. In the past, they were under strong political influence and distributed the media buying budgets of their clients accordingly. They have, for instance,

almost completely ignored local TV stations broadcasting in minority languages," said Abdiu.

The prices of advertising time and space are low and are dictated by the agencies, but the media have played a role in cutting down the prices. "One owner of a national radio station told me, 'The budgets for media buying in radio are dropping, and yet, the total time dedicated to advertising grows. I can't get a good price, so I have to increase the volume.' That is the general situation," Naumov said.

Broadcast media must adhere to strict limits on the amount of advertising time they can sell. Newspaper advertising is in constant decline, with less than five percent of pages dedicated to ads. The three nonprofit student radio stations sell advertising, to the chagrin of their colleagues from the commercial radio stations. Commercial advertising on the public service broadcaster is limited to two-thirds of the allowed advertising time per hour, with no commercial broadcast allowed during prime time slots. However, there are ongoing discussions to completely abolish commercial advertising on the public service broadcaster.

Local media find themselves in an especially difficult situation because most local companies do not feel the need to advertise, and these local outlets get only a fraction of national campaign budgets. Most advertisements are professionally produced, with those from international corporations particularly noteworthy. However, Macedonian advertising agencies have proven their competence, with many winning international awards for their campaigns and earning international contracts. In spite of the current moratorium on government advertising and media buying, panelists noted that the previous government managed to find ways to circumvent the ban and pump funds into friendly media.

The new government has stopped all programs of media subsidies, including budgets for public

enterprises, independent public institutions, and more. The program of public subsidies to produce feature and documentary content was largely abused by the prior government to direct funds to pro-government media and to dictate content, with priority given to "patriotic," family-oriented, and other generally conservative topics. The draft legislation proposes to eliminate the program altogether, but MPs are discussing the need for some types of media subsidies, especially for the struggling print industry. Additionally, the Association of Journalists is insisting on the creation of a fund for local and regional broadcasters. Panelists raised concerns about the available promotion budgets of local administrations, which are now distributed in a nontransparent manner.

The majority of media do conduct market research activities that serve as the basis for their

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.
- ▶ 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.
- ▶ 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.
- ▶ Broadcast ratings and circulation figures are reliably and independently produced.

programming schedules and acquisitions. One panelist observed, however, that there is often a disconnect between what some civil society organizations believe people should watch on television and what viewers actually want to see. “The fact is that TV stations used market research in planning programming,” Nikolovski said. “Sadly, research shows that Turkish soaps and telenovelas are what the audience wants, and we will continue to provide them.”

The law requires print media to publish circulation figures in their mastheads; they must include both subscriptions and copies sold by news agents. However, without a self-regulatory body or other agency, no one collects data to confirm numbers. The international marketing and research firm IPSOS is also active in the Macedonian market and can prepare some data. In general, circulations continue to drop well below levels of sustainability, and online subscriptions or other revenue to replace both lost circulation and advertising have not yet emerged.

To measure broadcast data, the regulatory body, in accordance with law, created a joint industry committee (JIC). However, the JIC took more than 18 months to sign an official agreement with the ratings company AGB Nielsen, and efforts to acquire new people-meters has begun only recently. The audiovisual regulatory body publishes regular quarterly and annual reports on the reach and ratings of regional, local, cable, and satellite broadcasters, based on the polls of a representative sample of Macedonian citizens. Despite several attempts by private companies, no official measurement system for Internet ratings has been agreed on. The Interactive Advertising Bureau’s Macedonian branch also tried to create an online media joint industry committee, again to no avail. Advertising agencies rely on Google Analytics data.

Media members generally do not trust ratings measurements—in part, panelists said, because of an absence of a common methodology. According to panelists, regular opinion polls that measure trust and confidence in information and news programs are also missing in Macedonia

OBJECTIVE 5: SUPPORTING INSTITUTIONS

2.32

There are several media trade associations in Macedonia. The most powerful and influential is the Macedonian Media Association (MMA), an organization of the national digital terrestrial broadcaster established under the auspices of the Macedonian Chamber of Commerce. The Association of Private Media of Macedonia (ZPMM) is composed of privately owned local and regional media. Pro-opposition news sites formed the Association of Macedonian Internet Portals (AMIP) in 2013 with the specific goal of endorsing the regulation of online media proposed by the government. The Association of Private Electronic Media of Macedonia (APEMM), dormant for more than a decade, was revived recently and is made up primarily of radio broadcasters who advocate for their interests in the process of audiovisual services legislative reform.

The AJM is the oldest and most active professional association of journalists in the country. AJM, together with the Independent Trade Union of Journalists of Macedonia (SSNM), fights for the advancement of professional and working standards and the social standing of journalists. The organizations also speak on efforts to improve the political situation in Macedonia. AJM and SSNM are partners

of the European Federation of Journalists and the International Federation of Journalists. AJM and SSNM collect membership fees, but their activities largely depend on the availability of foreign funding. The Macedonian Association of Journalists gathers journalists from pro-government media. Although it was formed in 2001 by journalists not satisfied with the work of AJM at the time, it was later taken over by pro-government journalists with the specific goal of counteracting the work of AJM. AJM and SSNM have been very active in the process of changes and amendments to the Law of Audio and Audiovisual Media Services; the current draft of this law is based largely on a draft prepared by AJM in 2016.

As panelists noted, the situation for media support organizations in Macedonia is much improved compared with several years ago. “Back in 2012, there was only AJM. Now, there are many more trade and professional organizations that are active and trying to promote and advocate for the interests of their constituencies or members,” said Sekulovski. “Also, AJM is constantly quoted in all relevant international reports on freedom of expression.”

A number of NGOs work in the media sector and in all different aspects of media. 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 freedom; the Centre for Civil Communications, which focuses on access to public information; and Info-centre and Helsinki

Committee for Human Rights, both of which serve as watchdog and monitoring organizations. A number of organizations also work to prevent hate speech. Most NGOs working in media collaborated to draft and present recommendations in line with the Priebe Report and urgent reform priorities on necessary reforms and interventions in the media system and in media legislation. Panelists voiced concern, however, that most of these organizations, including professional associations, depend on foreign donors' funds and are one failed project away from closing operations.

"Macedonia has no students that would like to study journalism," Bejkova explained. "On one hand is the quality and the lack of practical training, and on the other is the general standing of the profession and the lack of interest among the young people to study journalism."

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 have reputations for producing undertrained journalists with little practical and hands-on skills or knowledge of how newsrooms work; they focus on theory with little practical training. The Skopje-based School of Journalism and Public Relations and its affiliate, the Institute for Communication Studies, offer bachelors and graduate programs in journalism and media. Panelists said, however, that because the public standing of journalism is so low, there is little interest among young people to study or enter the profession. "Macedonia has no students that would like to study journalism," Bejkova explained. "On one

hand is the quality and the lack of practical training, and on the other is the general standing of the profession and the lack of interest among the young people to study journalism."

Short-term trainings are available only on an ad hoc basis, usually provided by NGOs that have managed to secure funding and incorporate training workshops or seminars for journalists in their projects. These programs do not always meet the needs of media in Macedonia, but rather the priorities and agenda of the organizations that prepare them. Panelists added that there seems to be a lack of interest in these types of training, judging from the quality of the personnel delegated to such training workshops. Several embassies offer programs for study visits and short education programs abroad, and most of those programs do not charge a participation fee. There are also limited funds available from some donor organizations to cover fees and expenses for journalists to participate in training programs abroad.

In-house or on-the-job training is almost non-existent, although some organizations, most notably the School of Journalism and Public Relations, offer custom training programs on demand, tailored to meet the needs of the outlet that commissions them. Panelists said media owners are not prepared to invest in training programs, citing high turnover of journalists from one outlet to another as the main deterrent. In general, journalists are left to fend for themselves and approach organizations that offer short-term trainings on their own. Also, the in-house training operations that existed at some mainstream media outlets that produced excellent practicing journalists are defunct.

There are no restrictions on the import of materials or equipment necessary for media production. Recording equipment and editing software are increasingly accessible and affordable,

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.
- ▶ Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- ▶ Sources of newsprint NGOs support free speech and independent media.
- ▶ Quality journalism degree programs that provide substantial practical experience exist.
- ▶ Printing facilities are in private hands, apolitical, and unrestricted.
- ▶ Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.
- ▶ Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

thanks to the rapid progress and 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 print refusals 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. Interestingly, even the new, cost-free daily Nezavisen vesnik chose to distribute nationally, which does not seem to be a prudent business investment considering the costs of transport. In terms of broadcast media, the two commercial digital terrestrial broadcaster multiplexes are operated by a single telecommunications company. Holders of

cable television broadcasting licenses note there is no must-carry provision in the Law on Audio and Audiovisual Media Services, leaving them at the mercy of cable operators that charge what respective local markets can bear to carry their programming services. Cable operators often refuse to carry individual broadcasters. Albanian-language television stations (that hold national licenses) in particular are often not carried by cable operators in eastern Macedonia, under the pretext that there are very few Albanian speakers in that part of the country. In the past, the local cable operators' decisions on which channels to carry was largely politically motivated.

Macedonia has a good broadband Internet infrastructure, and the latest surveys conducted by Macedonia's State Statistical Office show Internet penetration figures at more than 73.6 percent in the first quarter of 2017. Furthermore, the penetration of mobile telephony has advanced greatly, with more than 40 percent of citizens saying mobile devices are their primary way to access the Internet. Despite this existing infrastructure, media have not yet adapted to the increasing importance of mobile technology, both in terms of specialized content or as a source of advertising revenue. No attempts by the state to filter websites or meddle in registration of websites and news portals have been noted.

List of Panel Participants

Marjan Nikolovski, journalist, Sitel TV, Skopje

Mevaip Abdiu, owner, TV Koha, Tetovo

Zarko Jordanovski, editor, Sloboden pecat daily, Skopje

Klime Babunski, media analyst and communicationist, ProMedia/Institute for Sociological, Legal and Juridical Research, Skopje

Vedad Mehmedaliu, editor-in-chief, Koha daily, Skopje; member of the Programming Council of Macedonian Radio Television (public service broadcaster)

Biljana Bejkova, PR specialist and civic activist, NGO Info-centre, Skopje

Arta Latifi Tahiri, journalist, Alsat M TV, Skopje

Suzana Nikolic, owner/editor, Kumanovonews.com news site, Kumanovo; correspondent for several national media

Vesna Krsteva, editor-in-chief, Kanal 77 Radio, Stip

Marina Tuneva, executive director, Council for Media Ethics in Macedonia, Skopje

Ilija Stefanovski, owner/editor-in-chief, Radio Kocani, Kocani

Stole Naumov, program assistant, Media Development Centre, Skopje

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

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The panel discussion was convened on December 15, 2017.