

The prolonged political crisis has fortified the existing divisions in Macedonia's media sector, primarily along political lines, into pro-government and critical/independent/pro-opposition media.



MACEDONIA

The political crisis that started when the opposition boycotted Parliament after the 2014 parliamentary elections culminated in a series of protest rallies by different social groups. The protests were organized in parallel with the opposition's campaign of disclosing corrupt governance through release of leaked wiretapped phone conversations exposing serious abuses of power and public funds, interference with judicial independence, breaches of fundamental rights including media freedom, and disregard for election integrity. At the start of June 2015, with mediation by the European Commission and European Parliament, the so-called "Przhino Agreement" was brokered. It covers the need for urgent reforms in several important systemic areas—electoral rules, the judiciary, and media, above all—with the aim to ensure that the early elections, scheduled to take place in April 2016, will be free, fair, and democratic.

Macedonia remains a candidate for European Union membership. On the other hand, the recommendation to the EU Council to open accession negotiations, which was routinely issued by the European Commission, has been conditioned with the implementation of the reforms listed in the "Przhino Agreement," subject to review after the April 2016 elections. The European Commission's 2015 Progress Report on Macedonia noted deep concerns in the area of fulfillment of political criteria and that freedom of expression is difficult to exercise in the current media and political climate. Of note, it expresses concerns over "worrying attempts to limit media reporting on matters of public interest."

The economy continues to grow at a rate of 3.1 percent per year, the third highest growth rate in Europe. The government still relies on attracting foreign investments, sweetening the deal with tax relief and other incentives. However, direct foreign investment *per capita* still lags behind other countries in the region, and neither the growth rate nor foreign investments have produced better living standards. The bleak economic prospects have resulted in huge levels of economic emigration, and some sources estimate that perhaps one-quarter of the population has left the country for good over the past ten years. Macedonia is also dealing with the refugee, since it is one of the countries on the route between the Middle East and Western Europe.

The prolonged political crisis has fortified the existing divisions in Macedonia's media sector, primarily along political lines, into pro-government and critical/independent/pro-opposition media. The media are an important topic of discussion in the ongoing negotiations on reforms necessary to ensure free and fair elections, whenever they may come. Those reforms include the need to ensure a public broadcasting service that will serve the public interest and not the interests of the state, improve the conduct of the media during elections, and protect the media from interference in their editorial independence or business practices—especially through abuse of government advertising budgets.

MACEDONIA at a glance

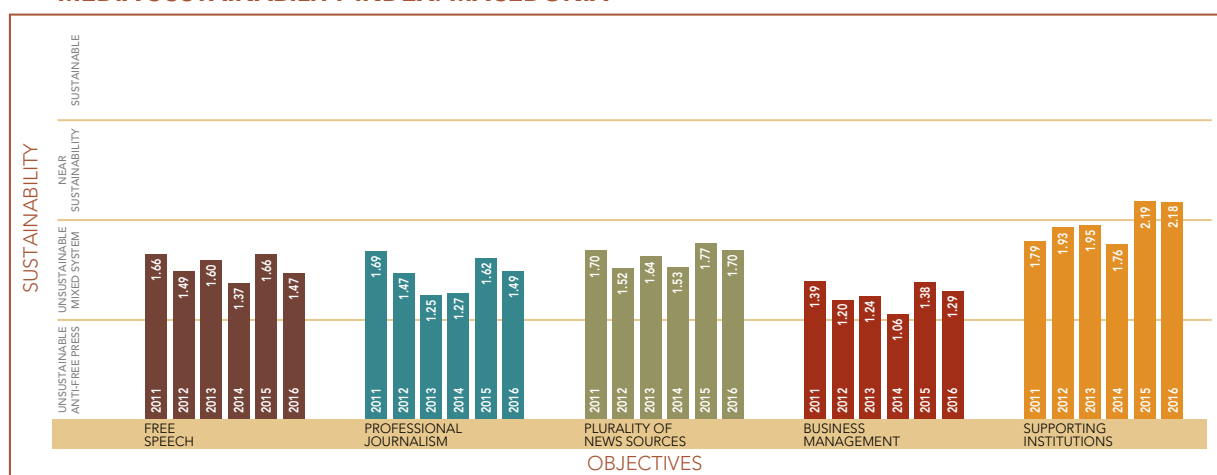
GENERAL

- > **Population:** 2,096,015 (July 2015 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 (2014-Atlas):** \$10.69 billion (World Bank Development Indicators, 2016)
- > **GNI per capita (2014-PPP):** \$12,800 (World Bank Development Indicators, 2016)
- > **Literacy rate:** 97.8%, male 98.8%, female 96.8% (2011 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



MEDIA SUSTAINABILITY INDEX 2016: OVERALL AVERAGE SCORES



CHANGE SINCE 2015

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

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 http://www.irex.org/system/files/EE_msiscorers.xls

OBJECTIVE 1: FREEDOM OF SPEECH

Macedonia Objective Score: 1.47

Freedom of expression and media freedoms were very much in the focus of public opinion and public discourse in 2015. The political crisis that started with the decision of the opposition to boycott the Parliament after the 2014 early parliamentary elections, deepened the division among media along political lines, into pro-government and independent/critical media. The phone communications presented by the opposition in the disclosure of the huge wiretapping scandal that allegedly covered private communications of more than 20,000 people, presented new information about widespread corruption and abuse of power, including corruption in the media scene. Ultimately, the wiretapping scandal proved the old problem of Macedonia having good, even excellent laws that on paper provide all the necessary protections for the rights and freedoms of citizens, but the implementation leaves much to be desired.

Freedom of expression is guaranteed by the constitution and the related legislation is aligned with the standards listed in international documents and treaties on freedom of expression. The society, on the other hand, remains conservative, patriarchal and the prevalent nationalist

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

FREE-SPEECH INDICATORS:

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

ideology has little understanding for any minority or dissenting opinion. In Macedonian multiethnic and multicultural society, ethnic and social groups expect from the media to protect the interests of the nation or state, and those who support a more open, democratic and inclusive society and protest the abuses and violations of freedom of expression are in minority. In such circumstances, it is easy for the centers of power, especially the government, to circumvent the law whenever it feels like it or whenever it is opportune, and to invoke the will of the people when asked to explain such actions. The government has abused that situation to put pressure on critical media and to award those media friendly to its policies with lucrative government advertising deals. Panelists did comment that the situation has improved over previous years, especially in terms of growing numbers of people who are discontent and publicly express their dissatisfaction with the overall situation in the country, including in the area of freedom of expression and freedom of media.

In January 2015, the Appeals Court upheld the decision of the court of first jurisdiction, which sentenced journalist Tomislav Kežarovski to a four-and-a-half year term in prison, but ruled to reduce his sentence to two years in prison. Kežarovski was found guilty if revealing the identity of a protected witness in a homicide case, however, there is a prevalent opinion in the public and the media community that he was actually punished for his persistent investigations of corruption in the judiciary and the fact that he refused to name his sources in the judiciary. The dominance of executive branch over the judiciary has long been a problem for Macedonia, noted in many reports by competent international institutions and organizations, including the European Commission in its annual reports on Macedonia's progress on the road to EU accession.

A licensing regime is in place only for broadcast media. Licensing is managed by the Agency for Audio and Audiovisual Media Services. A two level system is in place: terrestrial digital broadcasting licenses have to be allocated through a public call procedure, while licensing of cable and IPTV television broadcasters requires no such procedure and licenses are awarded automatically, albeit the criteria that need to be met and documentation that needs to be submitted is the same.

At the start of the year, under the new Law on Audio and Audiovisual Media Services (entered into force in January 2014), a procedure for renewal of licenses for terrestrial television and radio broadcasting were renewed. The Agency also received the first initiative to open a public call for allocation of one license for general format, predominantly news and information DVB-T television

“If last year, 300 or 400 people would join our protests and sit-ins, this year we had 4,000 people in the protest rally to support Tomislav Kezharovski,” Petrit Saracini said.

broadcaster. After it ruled that it shall not open public call because its analysis showed there was no need in the market for such a broadcaster, the company that submitted the initiative complained alleged that the Agency’s decision was motivated by the fear that the potential new broadcaster will be critical of government policies.

Panelists noted the fact that the Agency is under strong influence of the government: most of the members of its Council are nominated by political institutions and so can easily be coerced into cooperation with the government. In addition, the nomination procedure is set in such a way that it allows for people with little or no experience in the media sphere. “For some members of the agency, their first experience in media came with their appointment to the Agency’s Council,” says Violeta Gligorova, media expert currently with Metamorphosis Foundation, organization that works in the area of Internet rights and is now developing a media program, including its own news agency. The Agency also keeps registers of broadcasting and print media, and has some supervision and oversight competences over the print media, too. Online media were left out of the registration regime.

By law, market entry is free and fair for all media. There was some movement in the broadcast media market in 2015, with entry of three new nationally broadcasting cable TV networks, with the fourth expected to start operations in January 2016. However, the audiovisual regulatory body is using its new powers to condition the entry into the DVB-T segment with assessment of need for proposed type or format of broadcaster and its potential impact on the market. Print media, too, need to be registered with the proper authority as either commercial company or civil association.

The explosion of online media emerging in the market thanks to using an inexpensive platform has stopped, although several smaller operations appeared, with clear political agendas either on the side of the government or the opposition, after the escalation of the crisis. Increasingly, there are concerns over the proliferation of online media that create havoc in the market, with various voices proposing that they, too, should enter some form of registration process.

While by law, tax regulations are impartial and objective, media critical of the government fear they are more likely to get a visit from tax authorities than their pro-government counterparts. Again, panelists repeated the position that some form of tax relief or privileged taxation rates should be introduced to help the media, which are hit hard by the current crisis of advertising market. Also, they noted the fact that the compensation for small rights to broadcast music collected by collective bodies, is set at 4 percent of media outlets’ gross income, which, in their view, constitutes *de facto* another form of taxation.

The Association of Journalists of Macedonia reported about a dozen attacks on journalists and media professionals in the first half of the year alone. The incidents included verbal and physical assault, preventing journalists from reporting on events, destruction of their professional equipment and personal property. The most serious incidents included unknown persons leaving a funereal wreath at the front door of prominent journalist critical of the government, setting the car of another journalist on fire and attempt by a government minister to start a physical altercation with a pesky online journalist/blogger.

The opinion in the media community is that such threats or attacks are likely acts of members of the ruling political party, whether acting alone or on orders by high-ranking party officials. It is usually fellow journalists, human rights defenders and civil society activists that react strongly to such incidents, while the proverbial “silent” majority largely remains silent. Panelists noted that such incidents are never fully investigated or prosecuted.

On the other hand, they noted that the situation has improved over the previous years, and that there is growing public awareness and greater and stronger public reaction when such incidents transpire. “If last year, 300 or 400 people would join our protests and sit-ins, this year we had 4,000 people in the protest rally to support Tomislav Kezharovski,” Petrit Saracini said.

Political divisions between the media themselves, several panelists commented, results in an unhealthy situation in which pro-government media venture so far as to claim, in their reporting on attacks on journalists, that attacks never took place, that they were invented by people seeking attention or aiming to smear the government or the ruling party with false accusations, or that they deserved it with their actions and reporting.

The Law on Audio and Audiovisual Media Services offers full guarantees for independence of editorial policies of the public broadcasting service, the Macedonian Radio and Television. However, through the procedure of appointment of members of the Programming Council of

MRT, its governing body, which are nominated primarily by institutions depending on budget funding or political institutions, such as the Parliament (which the opposition boycotted at the time) or the association of units of local self-government, the government manages to ensure strong control over its programs. The same is true of appointments for chief executive and editorial positions in the public service broadcaster, who are selected because they are certain to do government's bidding and will view the MRT not as a public broadcasting service but as a state television.

As was revealed in one of the leaked phone conversations between the Minister of Interior and the head of security and counterintelligence agency, high-ranking officials of the ruling party even decided about appointments of journalists and intervened in editorial decisions directly. Also, due to dropping collection rates of the broadcasting fee (paid by all households and businesses that own a TV set as a public due), growing portion of MRT's budget is provided from the state budget (close to 30 percent in 2015), as another instrument of ensuring favorable editorial policies.

As a result, the public service broadcaster's reporting on political events is strongly biased in favor of the government. It largely ignored the wiretapping scandal, the protests of Skopje University students just across the street from its headquarters, to the effect that it was target of several civil society protests demanding from MRT to start reporting impartially, truly, fully and objectively, in accordance with its legally defined remit. On the other hand, MRT journalists are given preferential treatment in coverage of government organized events, when PM's and cabinet ministers' travel abroad, although similar treatment is given to all pro-government media, unlike pro-opposition and media critical of government's policies. Also, panelists listed examples when events do not start until MRT's cameras and reporters arrive, regardless of how long a delay it may cause.

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 amounts of compensations/fines that they may be ordered to pay. Even with such limits, which are set at amounts that are rather insignificant for Western standards (\$2150 for the journalist, \$10,750 for the editor, and \$16,100 for the publisher), the impoverished media in Macedonia fear every defamation lawsuit because one maximum fine may force them to close shop. Last year, we have seen the rise in number of defamation action lawsuits filed by journalists, usually from pro-government media, against fellow journalists from the critical media.

Quite often, the information they release is incomplete, heavily redacted or not related to the actual request. "You ask them one thing, they answer something completely different," said Petrit Saracini, TV editor and prominent freedom of expression and media activist.

Panelists noted the fact that judges, many of whom owe their appointments to the ruling party, clearly apply double standards when trying defamation cases involving high-ranking party or government officials as litigants, compared to the cases in which ordinary citizens appear as plaintiffs or defendants in defamation cases. In the latter case, they follow the word of the Law, the international documents and the case law of the European Court of Human Rights to the latter. In the former, they are likely to rule in favor of the plaintiff, regardless of the actual facts and merits of their case. Online journalists may find themselves at greater risk because online media are not explicitly mentioned in the definition of media in the Law on Media, prompting some judges to deny them the protections that the defamation law prescribes for journalists and media, for instance, the limits on the fines.

Government and politicized public administration and institutions remain extremely closed to the public and media and continue to rely on the tactic of delays and stalling when dealing with FOI requests, usually waiting to the last possible moment to issue the requested information. Quite often, the information they release is incomplete, heavily redacted or not related to the actual request. "You ask them one thing, they answer something completely different," said Petrit Saracini, TV editor and prominent freedom of expression and media activist. Also, there is abuse of legislation on classification and confidentiality of documents to prevent certain information to be released to the public.

Through activities of several organizations that work on FOI related issues, many journalists have received sufficient training in the use of their FOI rights. However, FOI requests remain the domain of those who specialize in investigative journalism. Panelists commented that journalists, in general, do not use FOI requests sufficiently and that they rarely use all legal remedies available to them when they have been denied access to information.

In general, the government is keen on controlling all information that is released to the public, using primarily friendly media with pro-government editorial policies, which have no problems with getting information, statements by government ministers and officials. The pro-government media seem to be expected not to intervene in any way or fashion in the supplied text and to publish it in its integral form. Government and ruling party officials also actively shun the critical and independent media, and choose to appear only in those media where friendly journalists tend to ask “softball” or prearranged questions. Government officials also seem to refuse to answer any questions, even in public press conferences, that were not prearranged, or would take only questions from journalists from pro-government media.

There are no legal or practical restrictions to the access to local and international news and news sources, and we have not seen any efforts at filtering foreign online news sites. On the other hand, the audiovisual regulatory body has acted to force cable network operators to take out of their catalogues channels that specialize in sports and feature films and series, citing lack of proper licenses to broadcast in Macedonia. However, there are suspicions that such a move was motivated by intent to protect the national advertising market and to stop major Macedonian advertisers to purchase airtime on those extremely popular channels, especially on the sports channels.

Most traditional print and broadcast media have agreements with at least one international news agency. Smaller media, especially online, are rarely able to afford the services of international news agencies and rely mainly on foreign internet news sites as major source of international news, and especially or infotainment and trivia contents that are good for attracting of large audiences, with little regard for intellectual property and copyrights. As European legal tradition does not recognize nor apply the “fair use” doctrine, it is not part of the copyrights legislation. There have been, however, one initiative for a self-regulatory action based on the fair use doctrine, accepted by a dozen or so news-sites, but they mostly apply it to contents produced locally, in Macedonia.

The Law on Media includes a definition of journalists, which ties the profession to work or cooperation with a proper editorial office, whether one is employed by a media outlet, or works as freelancer. The situation is

somewhat different for online journalists, because the Law does not explicitly mention online news sites (electronic publications) in its definition of media, which opens the possibility for journalists working strictly online, citizen journalists or bloggers not to be recognized as journalists and thus be denied some of the rights, like protection of sources, access to events, etc. Bloggers and citizen journalists are also not really recognized as peers by the journalists formally recognized as such, who view them as unfair and under-qualified competition in the ever-shrinking advertising market.

There are parts of the journalistic community that promote the idea of licensing of journalists, although they are not clear who or what body should be charged with allocation of licenses. That does not prevent some traditional media to use blogs and social media posts to enhance their opinion pages. There is evidence of active collusion of some journalists, especially in pro-government media, who in exchange for privileges and for lucrative reward, choose to practically work as government’s propaganda mouthpieces. In one of the wiretapped conversations, a voice that allegedly belongs to a prominent editor in a leading pro-government national TV broadcaster says, “We receive huge privileges... and for those privileges, we need to deliver some services.”

In general, showing a press card will get one to any event or press conference organized by public bodies or institutions, although some institutions, like the Parliament, require special credentials issued by them.

Entry into journalism is free, although some minorities, for instance Roma, remain largely underrepresented in mainstream national media. As far as employment is concerned, the government seems to have the final word in the hiring policies of pro-government media and, of special note, the hiring in the public service broadcaster. Panelists noted cases when whole editorial teams were transferred, without consulting or informing the concerned journalists in advance, from one pro-government media to another. Panelists noted the difficult situation in which correspondents of foreign media find themselves, sometimes having to wait for unnecessary long periods of time to get their credentials accepted by the Ministry of Foreign Affairs, the institution charged with the task to issue credentials to foreign journalists.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Macedonia Objective Score: 1.49

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 journalistic profession.

As a general rule, independent media and media critical of government's policies do much better job in presenting fair and objective reporting, although some of them exhibit some positive bias towards the opposition. 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. Journalists in pro-government media are seen primarily as instruments of government's propaganda, who often engage in vicious attacks on its political opponents or journalists from critical and independent media. Both sides have their own pools of experts who will affirm or strengthen the opinion presented by the journalist. Several online only operations dedicated exclusively to investigative journalism provide high quality, in-depth, long-form reporting on issues of public interests. Panelists noted marked improvement over the previous years, and pointed out that latest available surveys show that the critical and independent media enjoy growing confidence of the public. "Professional journalists are winning the battle over the propagandists," said Petrit Saracini.

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

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

Blatant violations of ethical standards of journalism are very much present, in spite of the existing Code of Ethics, which is in line with international standards for such documents. When adopted, was endorsed and accepted by all media in Macedonia. Today, it is practically the ethical code of one of the two journalist associations—the Association of Journalists of Macedonia. The other association, the Macedonian Association of Journalists (original acronym is MAN) has not adopted a code of ethics that would apply to its membership, consisting mostly of journalists from pro-government media. The Media Ethics Council is gaining an ever-higher profile. However, not all media recognize its authority and ignore its decisions because, as Sefer Tahiri, a member of the Media Ethics Council's Complaints Commission commented, "Nobody seems to be prepared to accept that they have made mistakes. Owning up to one's mistakes is the right thing for a professional to do."

The almost constant rumors that journalists and editors accept payments for their services were confirmed by the leaked wiretapped conversations, in which it was revealed that editors from pro-government media admitting that they "deliver services" for which they are compensated with "huge privileges." In addition, panelists noted that journalists in general have no qualms accepting gifts, usually presented as part of promotion campaigns, from major companies and corporations. Advertorial contents are gaining ever more ground, both in traditional and in online media.

The greatest cause of concern was the PR campaign of the Prime Minister and the government visiting rural communities all over Macedonia, produced by one of the leading advertising and production companies in the country, which was then aired in the newscasts of all national TV broadcasters, including the public broadcasting service, without warning the viewers or properly marking the footage as political advertising, which it essentially was. Plagiarism is not such a great concern, as both online and mainstream media usually attribute the material they have republished or used more or less adequately, although several panelists expressed serious concerns over the situation, especially in online media. The problem is that such republication or use of segments of other people's contents is often done without any consent, and far exceeds, in terms of scope and volume of information used, the accepted standards and conventions.

There is constitutional ban on censorship in Macedonia. Self-censorship, on the other hand, is a pervasive problem. Years of political and economic pressures have conditioned the journalists, and the society in general, to know what

“Salaries are much lower than what our colleagues in the neighboring countries get. Journalist salaries are at the level of janitorial position in a solid foreign company’s branch in Macedonia,” said Darko Cekerovski, TV journalist and trade union activist.

can and what cannot be reported. Panelists pointed out that journalists themselves have some responsibility for that situation and that it is also an issue of integrity of journalists and editors, who self-censor themselves even when they do not need to do that. Much of the self-censorship is imposed by media owners or editors, who restrict the freedom of their journalists to avoid endangering their other business ventures. As much of national economic activity depends on public spending, media owners tend to be fearful of angering the government. Gordana Duvnjak, experienced journalist/editor at “Utrinski vesnik” daily, confirms that many a story she proposed after getting solid leads were prevented by the senior editors.

Journalists cover all key events and issues, depending on the capacity of their media to support such coverage. Smaller editorial offices, especially in the online media, usually rely on republishing or digesting reports published by those media that can provide the coverage. As several panelists noted, it is another matter if their media outlets will actually publish the reports and how the information will be presented, and the manner of coverage is usually politically motivated. In order to get a full and complete picture of a given event, the citizens rely on the practice of reading and comparing the information provided by several media outlets, to get all sides of the story.

Pro-government media, including the politically dominated public broadcasting service, focus on the activities of the government and state institutions. Several panelists noted that it was as if they believe their main task was to praise the achievements of the government. On the other hand, they cover the activities of the political opposition and the civil society only if the information can be turned around and used to attack those actors that oppose government’s policies. Panelists noted that it sometimes leads to strange situations in which the media would publish reactions by the ruling party to events that pro-government media have not originally covered. Independent and critical media, most of them online, lack the funding and human resources to cover

everything, but they are, as a result, focused on key and important event and manage to provide a more complete coverage. Panelists commented that social media, such as Facebook or Twitter do help in the coverage of key and important events and issues, but their coverage is even more biased while facts are being distorted to fit one’s political position.

Journalists’ salaries are below national average, certainly well below other professions or civil servants, and can barely suffice to cover the minimal living expenses. Panelists generally agree that journalist salaries are well below any level of propriety and decency. “Salaries are much lower than what our colleagues in the neighboring countries get. Journalist salaries are at the level of janitorial position in a solid foreign company’s branch in Macedonia,” said Darko Cekerovski, TV journalist and trade union activist. Freelance journalists can hope for meager compensation for their stories, with exception of those who manage to secure small grants for their investigative stories from the handful of organizations that offer such assistance for investigative journalism.

Journalists and photographers who are lucky to have agreements to work as correspondents or stringers for foreign news media or news agencies fare much better in terms of securing solid monthly income. On the other hand, some senior editors and reporters that work primarily to protect different political or special interests are reported to collect much greater paychecks. Panelists commented that the government has secured for “its journalists” lucrative side jobs and engagements, usually in the PR industry. Rumors also have it that they encourage their reporters to “do what they need or must, just don’t get caught.” Journalists are forced to take side jobs, usually moonlighting for public relations or advertising agencies, or work for several media at the same time. In addition, many also operate their own websites in the attempt to enhance their income.

The general low economic status of the profession does not necessarily correlate with corruption, but prevalent opinion in the society is that journalism is one of the most corrupt professions in the country. For economic reasons, or simply because they have become disillusioned with their profession, many journalists are leaving journalism, usually for the more lucrative advertising or public relations jobs available in the market, or, as several panelists noted, join NGOs.

The proliferation of online media has allowed those who have access to Internet to get the information they need at the time they need it. All media, however, continue

with the move towards the tabloid and trivial, focusing on entertainment contents that would attract as many viewers or readers as possible, and therefore greater advertising revenue. In addition, a number of specialized format foreign channels (sports, feature films and series, etc.) have gained a dedicated and loyal audience.

Panelists noted that the fact that almost all TV broadcasters hold licenses for general format, predominantly entertainment TV, which prescribes the share of news and information programs in their programming schedules, and that those standards are observed. The broadcasters increasingly rely on cheap but popular reality TV programs, produced in neighboring countries with regional reach and telenovelas to attract large audiences. Panelists commented that the fact that most reality programs are imported from a single neighboring country may prove to be a problem. News audiences, editors of biggest national broadcasters admit, are shrinking so many broadcast media have adopted the tactic of placing newscasts between two popular telenovelas or reality programs, to make sure as many viewers as possible will stay on the channel and watch the news.

News and information programs make up to 30 percent of the total programming, but a 20 percent figure may be closer to the actual situation. On the other hand, recent survey shows that about 30 percent of the population regularly watch the news on more than one TV channel. Panelists also noted certain progress over the previous years, with emergence of several new and important debate programs.

The biggest national broadcast and print media have solid technical capacities for gathering, production and distribution of news. Smaller media, especially local broadcasters, have to work on much older and sometimes even outdated equipment, as they cannot afford any upgrades, and are forced to improvise with what they have. Online media, on the other hand, have benefited from the cheap technological platform they use, and the availability of new handheld video and audio recording devices.

Panelists commented that the way in which the technology is used is another matter. The general impression is, for example, that traditional media do not use their online extensions effectively enough, that is, they use them as

another transmission or distribution channel, without taking into consideration content-related and even news and information gathering advantages that they may bring to the table. Online media, depending on the previous experiences of their owners or journalists, are yet to use the full multimedia potential that internet offers for integration of text, audio and video in a full interactive news experience, or to move into new forms allowed by advancing technology, such as data-journalism.

Niche and specialized reporting and programs exist, but are increasingly difficult to maintain in the newly emerging media eco-system. The public broadcasting service leads the way in providing diverse and specialized programs, among other things, because it is a part of its legally defined remit. Economic concerns have pushed the commercial traditional media to reduce the numbers of journalists in their newsrooms, where everybody is expected to cover more than one field or topic. Panelists noted that few journalists can truly specialize in a single area, because of lack of investment in proper training and education it would require. Specialization has largely moved to the Internet, with several excellent specialized websites that cover economy, business, sports, culture or information technologies.

Investigative journalism has also largely moved to the Internet, with several websites, funded by foreign donors' money, offer quality investigative reporting. Traditional media rarely support investigative journalism, for a multitude of reasons—it is expensive and cannot pay itself; may sour their relations with advertisers or government; or for political reasons. "Pro-government traditional media rarely do investigative stories, unless we consider the pamphlets aimed to attack the opposition or the civil society investigative reporting," says Zoran Dimitrovski from *Fokus* magazine, one of the few print media that still pursue and publish investigative journalism. Blogging and citizen journalism communities make little contributions, focusing instead primarily on commentary and opinions of current political or economic situation in the country. Local coverage is also pushed to the margins, with most traditional media focusing on national political scene. On the other hand, in most urban areas outside of the capital, websites exist that offer some limited coverage of local events, politics and economy, although they are primarily focused on entertainment.

OBJECTIVE 3: PLURALITY OF NEWS

Macedonia Objective Score: 1.70

The media scene in Macedonia is oversaturated, with hundreds of media—there are over 130 broadcast media alone, radio and TV stations broadcasting on national, regional or local level. There are also half a dozen dailies, a handful of weekly newspapers, and 100+ online news sites that provide news and information in all areas of interest of the citizens.

The abundance of media outlets does not necessarily mean a great diversity of news reporting. In fact, one of the major issues that emerged during the ongoing political crisis, especially in the pro-government media, is that often they carry absolutely identical reports, so that suspicions abound that much of their political coverage is written at one center and then distributed for publication. In addition to oversaturation, the media scene is deeply divided along political lines, usually presenting just one side of the story. In order to gain the full picture of an event, or gather the positions one is forced to consult several news sources from both sides of the political divide, and across several platforms.

There are several broadcasters (nationally broadcasting terrestrial and cable networks) that originally broadcast in Albanian, but also produce bilingual programming and news that are more objective and impartial, because they are seen as “not having a dog” in the political battle that is fought mainly by Macedonian political parties. In spite of

the fact that over 40 percent of the population said they access Internet through mobile devices, mobile platforms are greatly underused for presentation and distribution of news.

There are no legal restrictions to access to different types of media, either domestic or foreign. Rather, as panelists agree, there are geographic and economic restrictions. Those are especially evident in rural areas—communities are too small to make extension of cable networks viable, or are impoverished to afford cable subscription. As a result, they get only the terrestrial channels carried on the DVB-T platform, most of which follow pro-government editorial policies, seriously restricting their access to greater diversity of domestic and international media. Rural population is also less likely to have quality Internet access and options to buy daily or weekly press are very limited (it often needs a trip to the nearest town of bigger village). Citizens of urban centers have access to much greater variety of media and news sources, and have access to relatively cheap cable TV services that usually offer up to a 100 different channels, both domestic and national. Panelists commented that foreign press available in Macedonian newsstands is usually too expensive for the citizens to afford it.

Contrary to its legally defined public broadcasting remit and obligation to provide and ensure fair, objective, impartial, true and complete information and reporting, the public broadcasting service MRT is strongly biased in favor of the government. In fact, the editor-in-chief of the flagship First programming service has publicly said, in a debate on the role and position of the public broadcasting service, that MRT is above all a state TV and has to tend to the interests of the state and not the public. Its reporting focuses on government’s activities and “achievements” to the effect that it acts more as government’s PR office than public broadcasting service.

The activities of the opposition are, if not ignored, then covered most superficially. Even with the leader of the main opposition party presenting, on daily basis, findings about widespread corruption and abuses of power found in the leaked wiretapped communications, MRT chose to never present even an excerpt from a single such conversation, provoking a campaign protests of civil society organizations and a minor political party who demanded that it starts reporting on the wiretapping scandal and the findings it presented. In general, the reporting on the public broadcasting service does not differ much from the reporting of the commercial broadcasters and is almost completely aimed to promote and protect the interests of the ruling party.

Panelists noted that MRT, thanks to the legally prescribed remit, does offer more diverse programming contents, educational, cultural and other programming than the

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

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

commercial broadcasting. Even in such programming, it tends to air programs that reinforce and promote the values and ideology of the ruling party.

There are four news agencies: MIA and MAKFAX are traditional news wire services and two are self-styled online news agencies—NetPress and META, although the latter function primarily as news-sites and not as news agencies that produce news and information for sale to other media. MIA, as the national news agency, has gained notoriety as being government's promotion tool that most independent and critical media use it only for the daily list of important events taking place in the country that it publishes. META, on the other hand, is a spin off of a non-governmental organization and as such is expected to offer editorially independent and neutral news. All traditional broadcast and print media use their services, while the online media can rarely afford such services and rely more on the internet as a main source of news and information that they themselves cannot cover on their own. Only the biggest and most affluent media can really afford and use international news agencies. The others rely on the domestic news agencies or reporting available on the web for their international reporting. As noted by the panelists, there is no video news service available in Macedonia.

The mainstream broadcast and print media produce their own news, with scope and coverage that corresponds to their technical or human resources capacities, especially on national politics and economy. Panelists commented that mainstream media produce their own news, but a lot of it is basically PR work in favor of the government. Panelists also mentioned the fact that literally identical news (including all typos and grammatical mistakes) appear on dozens of media outlets, indicating that the reporting is produced in a single center and then distributed around in an orchestrated effort to unify the reporting, especially evident on the pro-government media. "It is as if the tactic was to make people think that if it was published in so many media, it must be true," said Dragan Antonovski, trade union activist, acting president of the Media Ethics Council and editor of the Lokalno.mk website. "I call those media 'Volvox' colonies, gatherings of smaller one-cell organism to work for the common benefit," Petrit Saracini added.

Print and broadcasting media have to meet legal requirements and criteria regarding transparency of media ownership, including the obligation to publicly declare ownership in proper registries of broadcasting media. Print media also need to list information on the publisher in their masthead. The problem, as panelists noted, lies in the fact that in many cases, and especially in broadcasting, that declared ownership is just formal, and that the official owners act as proxies for other entities or persons, including leaders

"It is as if the tactic was to make people think that if it was published in so many media, it must be true," said Dragan Antonovski, trade union activist, acting president of the Media Ethics Council and editor of the Lokalno.mk website.

of political parties. Citizens usually have some vague idea who the actual owners may be and make their assessments of the programs and information offered accordingly.

Another problem with ownership is that the majority of most influential print and broadcast media are part of bigger corporations with diverse portfolios, for which broadcasting or publishing are not their core business. That situation has detrimental effect on the editorial independence of their media, which are used primarily in support of their main businesses. Panelists commented that the government skillfully uses that situation through distribution of public tenders and deals for public works, to basically buy the services of the media owned by big corporations.

Online media are exempted from the Law on media, including the obligations regarding transparency. As a result, some prominent online news-sites are owned by shell companies registered in known off shore tax havens, with suspicions that actual owners are Macedonian citizens, including some prominent political figures and holders of public offices.

Foreign investments are insignificant, if we exclude those online media owned by shell companies registered in off shore tax havens—two national TV stations that broadcast over cable networks have majority foreign ownership, and one national terrestrial broadcaster has a foreign partner. Panelists noted the fact that one local company, working in partnership with prominent international media fund as co-investor, has several failed attempts to secure a national broadcasting license for news TV station.

Mainstream media, especially those that follow pro-government editorial policies actively ignore and neglect all social interests that are not in line with the conservative, demo-Christian values of the ruling party. They strongly promote family oriented, patriarchal values, and have been known, on occasion, to use outright inflammatory and discriminatory language against various social groups, especially persons with alternative sexual orientation and non-traditional gender identities. The independent and critical media tend to dedicate more space and coverage to diverse social issues, but most of them have much smaller

reach and influence. Mainstream media, in general, pay very little attention to minority groups, and when they do, as panelists noted, they are mostly concerned with relations between majority and non-majority ethnic communities. On the other hand, other minorities, especially sexual minorities, are severely underrepresented. "We organize so many events, and with exception of a handful of portals, nobody covers them," said Uranija Pirovska, executive director of Macedonian Helsinki Committee and human rights activist. The Internet allows for various social interests and groups to express themselves through what are, in essence, community media online.

The linguistic and ethnic minorities have their own media outlets, broadcasting or publishing in their language. Some of them are available only locally, in areas with higher concentration of members of the given ethnic or linguistic community, while the largest non-majority ethnic community, the Albanian, has media that broadcast in all levels, from local and regional to national. Albanian language TV broadcasters that also have news and political debate programs in Macedonia are increasingly popular among the other communities, as they provide much more objective and balanced reporting, being seen as "having no dog" in the ongoing struggle between the leading political parties in the Macedonian political bloc. Panelists concluded that the minority language broadcasters actually enjoy much greater freedom. The public broadcasting service has a special channel, the Second Programming Service, dedicated to non-majority ethnic communities. However, it pays much less attention to other minority or vulnerable groups or diverse social or cultural interests.

Few media can afford to maintain correspondents abroad, and if they do, and public broadcasting service is one of them, that is only in the neighboring countries and rarely in other major European capitals. Being present abroad is important only if high ranking government or state officials travel abroad, in which case they take with them a pool of journalists, mostly from the pro-government media and the public broadcasting service. Some panelists commented they have witnessed that in such cases, there were instances when reports from the visits and accompanying events are actually written by members of the staff of the travelling official. Lack of funding has forced most mainstream media to greatly reduce the networks of local correspondents, supplementing them with news agency's feeds, so that coverage of events outside the capital city has suffered as a result. Online media have even less resources and rely on the Internet for all coverage outside the national capital. Bloggers remain rather insignificant source of news and they focus on commentary and, occasionally, analysis of daily events and developments.

OBJECTIVE 4: BUSINESS MANAGEMENT

Macedonia Objective Score: 1.29

Macedonian media market is essentially unsustainable. Nobody measures the size of the advertising market systematically, but according to industry insiders, about 130 radio and television broadcasters, half a dozen dailies and two weeklies, and more than 100 online news sites fight for total available advertising estimated at between a low estimate of \$22 and the highest estimate of up to approximately \$40 million. Government advertising accounts for between a quarter and a third of the total available advertising revenue, a fact it uses to pressure the media into adopting pro-government editorial policies.

Most traditional media, especially national broadcasting and print media, are owned by larger corporations. The instability of the oversaturated and essentially unsustainable market does not allow them to engage in strategic planning. Their accounting and finance practices are either done on corporate level, or are sometimes outsourced to certified accountants. Only the largest and wealthy national broadcasters hire marketing or human resource specialists, while smaller media, especially online media, usually have one or two persons, usually the owner, manager or editor-in-chief (often unified in a single person), that makes all strategies and planning, allocates tasks, sells advertising space, etc. In general, the commercial media are understaffed, because shrinking advertising revenue and lower income generated has pressured them to shrink their editorial offices. The three student radios are the only

MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

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

community media working in Macedonia, and they operate under the umbrella of their respective state universities, and all of their funding is covered by the university budgets. However, some of them, in clear violation of the Law, also sell generate some very limited advertising revenue.

The bulk of the earnings of Macedonian media come from advertising, amounting to, on average, about 90 percent of their revenue. Some traditional sources of revenue, like classifieds, have almost completely been obliterated by specialized online classified ads websites, similar to Craig's List or E-Bay, although some print media continue to carry specialized classified ads supplements, as well as local TV stations that offer classified ads services to their viewers. Those that are part of larger corporations certainly benefit from internal subsidies, but are also dependent on the general financial situation in the mother company. For instance, in June 2015, the leading publishing company that publishes three dailies announced plans to cut salaries and lay off personnel, including journalists, because of outstanding claims that it was not able to collect.

Panelists noted that no media in Macedonia operate on strictly commercial bases and that all depend on some form of subsidies, either provided by the owners, donor funds, or, in the case of the leading pro-government media, hidden subsidies from the state. The citizens learned from the wiretapping scandal that the media that are part of large corporations are expected to adopt pro-government editorial policies to ensure that the mother companies will win lucrative public tenders, and that a share of the contract should go to the media, for their services in support of government's policies.

Panelists also commented that several major advertisers do influence editorial policies and content. "It is now more difficult to publish anything against the Telecom or the power supply company EVN than against the government," Darko Cekerovski said. Several online media, especially the entertainment and trivia websites are backed by IT companies and earn most of the revenue from sale of IT services (programming, web-development, etc.). Non-profit media, especially on the internet (several important news sites are published by non-governmental associations) rely on donor grants to cover their operations, but also try to expand their revenue-generating activities, mostly through sale of advertising space. Few among online media go beyond mere sale of banners into, for instance, affiliate retail sales, providing other services, organizing events, building loyal communities of supporters for crowdfunding purposes.

The Macedonian advertising industry is dominated by agencies that are local branches of large international advertising companies. In terms of latest techniques and

creative solutions in advertising, Macedonian industry does not lag behind the colleagues abroad, even the most developed advertising markets. Agencies, in general, dominate the advertising market, as they serve as gatekeepers between budgets of major advertisers and the media, and few media decide not to use their services and approach advertisers directly. They work with all media, but television still attracts the over 60 percent of the total available advertising, with rapid growth of digital advertising, which is now assessed to account for about 10 percent of the total advertising market. Agencies seem primarily concerned with their commission and pressure the media to agree to large discounts, so that discounts of even 80 percent or greater are not unheard of.

Panelists noted that the decisions on the distribution of advertisers' budgets is mainly politically motivated, and that few companies, usually local branches of major international corporations or their affiliates actually worry about demographics, target audiences or reach. There is anecdotal evidence that government controls the spending of advertising budgets of many private companies, suggesting where they should direct their advertising funds. In the commercial sector, cleaning agents and personal care products, telecommunications companies, car dealerships and food companies are the leading advertisers. One issue is the structure of Macedonian industrial output, which is dominated by mining companies, manufacturing of semi-fabricates and components for other industries, and loan production, all of which do not really need advertising, because they are either not consumer products, or their products are not sold in Macedonia.

Advertising time on broadcast media is legally limited to 12 minutes per real hour of programming. There are no such limits for print or online media, but the actual number of pages taken by advertising in print media, or the square inches of space in online media actually depends on their editorial policy—pro-government media in general have far more advertisements than the independent or critical media. The huge competition in the small market means that media have to try everything they can to attract advertisers, resulting in willingness to drop prices and agree to huge discounts, and to invest in cheap but popular programming, especially reality programs and telenovelas, to attract audiences that would bring in advertising. Similarly, on the web, many websites that intended to specialize in production of hard news coverage, have been forced to extend into tabloid-like, sensationalist, trivia and celebrity oriented contents to secure visitors. Non-profit broadcast media cannot sell advertising, and non-profit online media technically can, but, as they are mostly operated by NGOs

“It is now more difficult to publish anything against the Telecom or the power supply company EVN than against the government,” Darko Cekerovski said.

hostile to the government, they have to try and secure as much donor funds as possible.

The government, with its ministries and public enterprises under its control, is the biggest advertiser in the country, accounting for between 25 and 30 percent of the total available advertising revenue in the country, depending on the assessment of the size of the advertising market one accepts to be most correct. In June 2015, during the negotiations mediated by the international community on the necessary reforms in the media sector, the government announced a moratorium on all government advertising, but the moratorium does not include public enterprises and other public institutions with significant promotional budgets, or the municipal administrations. It mostly directs its advertising and promotion budgets towards friendly media, buying their loyalty and favorable editorial policies. “Even when they buy advertising space or time in independent, critical media, they pay to pro-government media €1,000 per banner, while independent media get €100 per banner,” Dragan Antonovski said. It also places legal notices, public calls and other announcements in friendly media. In addition to government advertising, the state subsidizes up to 50 percent of the costs of production of domestic feature and documentary films and series by the five national terrestrial TV broadcasters.

Market research activities are conducted regularly, and there are several organization that do such work. Panelists note, however, that in the current political situation, all marketing and advertising decisions are politically motivated or dictated and few companies, or media, use their findings systematically. Also, as some panelists commented, the media can rarely afford proper market research surveys and operations. The media tend to pay attention primarily to the size of their audiences and not actual age, gender or preferences of their audiences that could help them target

the advertisers that could benefit from specific audience. The situation may be slightly different with specialized media that are aimed at specific groups of people or specific subject, and they can and do, to the extent possible, use their knowledge of their audience in the marketing activities aimed at the advertisers and advertising agencies.

Ratings in Macedonia are measured by local affiliates of international ratings agencies and advertising time is now sold, at least officially, per rating point, although panelists note that other considerations are much more important in the distribution of advertising budgets. Broadcasting ratings are measured by Nielsen ABG Macedonia, which has a system of “people meters” installed in 400 households (more than 1300 individuals). Its ratings were traditionally disputed by the broadcasters who claimed they were slanted and distorted, and did not realistically presented their shares of viewership. According to the panelists, that situation has changed for the better. “We don’t have media representatives sitting with ratings agencies to negotiate how the latter should correct the ratings,” said Zoran Dimitrovski.

In 2015, the joint industry committee established with great involvement of the government and that Agency for Audio and Audiovisual Media Services, launched the procedure to select a new ratings agency, and the speculations were that they wanted Nielsen out and an agency tied to high-ranking government officials to take its place. AGB Nielsen, however, made the best offer and was again selected to measure the ratings.

Online statistics are measured by the local branch of Polish online advertising consulting and ratings company Gemius. It does not, however, cover all online media, having in mind that many of them cannot afford its services. As a result, advertisers and advertising agencies equally use Google Statistics measurements when deciding on distribution of budgets.

There is no body or institution that measures or keeps track of circulations of print media. Circulations have long been one of the most closely guarded secrets of the publishing industry, and any figures are matter of speculation or educated guesses. Print media release only their print circulation, and they are legally obligated to do so by the Law on Media.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Macedonia Objective Score: 2.18

There are two media trade associations in Macedonia: the Association of Private Media of Macedonia (APEMM) and the Association of Macedonian Internet Portals (AMIP). Both associations are inactive. APEMM has not officially disbanded, but it has not had any activity in years. The Association of Macedonian Internet Portals, after its creation at the time of adoption of the new media legislation in August 2013, when it supported the adoption of the new Law on Media, has been silent. Panelists noted that different media increasingly organize as business groupings under the auspices of the Macedonian Chamber of Commerce. Such are the Association of Privately Owned Media of Macedonia and the more recent Macedonian Media Association. The former gathers primarily local broadcast media, and the latter was created by five national DVB-T television broadcasters. Both were established to protect the business interests of their constituents, although they have been active in other areas, again, if they see that their interests have been threatened or may be advanced by their engagement.

The trade associations have low visibility and only appear when significant new developments affecting their operations emerge. Their ability to lobby the government is restricted by the government's inaccessibility and unwillingness to hear proposals that deviate from its own intentions and policies. On the other hand, the Macedonian Media Association worked closely with the Agency for

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

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

Audio and Audiovisual Media Services and the Ministry of Information Society and Administration on the creation of a joint industry committee that was set up to select new national ratings measurement agency. The trade associations depend on members to volunteer to support their activities given the unwillingness of media owners to finance them, which has already proved to be a decisive weakness in the past with the dissolution of the earlier Association of Private Electronic Media after the end of donor support.

The Association of Journalists of Macedonia (AJM) and the Macedonian Association of Journalists (MAN) are the two professional associations of journalists working in Macedonia. AJM is generally viewed as representing independent and professional journalists, while MAN is perceived primarily as government supported effort to counter the work of AJM. Panelists noted that AJM, together with the Independent Trade Union of Journalists and Media Professionals (SSNM), have greatly raised their profile and importance in Macedonia society. "We have professional associations, like AJM but also the Trade Union, that are not weak organizations anymore, without any influence in the social discourse. They are organizations that are heard when they speak," Petrit Saracini said.

In the face of constant obstructions from media owners who prohibit union activities in their newsrooms, and in spite of smear campaigns in pro-government media and attempts to undermine its activities, SSNM fights a persistent battle for journalists labor rights. At the start of December 2015, SSNM presented the draft of the collective bargaining agreement. Both AJM and SSNM are involved in providing some legal assistance to their members involved in litigations, with SSNM focusing on work-related disputes. AJM and SSNM are members of and constantly coordinate their activities with the International Federation of Journalists.

Several non-governmental organizations are directly involved and work on media-related issues. The leading two are the Macedonian Institute for the Media (MIM) and the Media Development Center (MDC). MIM works mainly in the areas of providing professional training and programs for professional development of journalists, and is involved in a regional program that monitors the situation in the media sector in Southeast Europe. MDC, on the other hand, works on issues related to 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 action cases or prosecuted for their reporting.

Several other NGOs work on media-related issues—ProMedia is a media consultancy and research organization; the Metamorphosis Foundation specializes in the area of

“We have professional associations, like AJM but also the Trade Union, that are not weak organizations anymore, without any influence in the social discourse. They are organizations that are heard when they speak,” Petrit Saracini said.

internet rights and freedom of expression online and has a program for monitoring of the digitalization of broadcast media in Macedonia; The Centre for Civil Communications works in the area of freedom to access public information; and a number of organizations, like the Youth Education Forum and Civil NGO work in the area of prevention of hate-speech and defense of human rights on the internet. While most organizations view each other as competition in the struggle to secure financial support from the donor community active in Macedonia, they cooperate extremely well on key issues and important matters that concern media freedoms or freedom of expression and react strongly to all attempts to curb freedom of expression in the country.

Three state universities, in Skopje, Tetovo and Štip have journalism schools, but the panelists expressed great dissatisfaction with their work, citing, in particular, the focus on theory and lack of any practical, hands on training that their students get. The Macedonian Institute for the Media has its own School of Journalism and Public Relations, which offers excellent practical training and produces newsroom-ready journalists. However, panelists noted, it has not enrolled any students to its undergraduate studies for two years in a row. Its more specialized graduate studies programs are fully operational.

For a second year in a row, panelists commented that young people increasingly avoid choosing a career in journalism. The reason, in their view, lies in the lost social status of journalistic profession, and the inability to find employment, knowing, as some panelists commented, the fact that there are hundreds of journalists who have lost their jobs due to downsizing of newsrooms in the current economy. There are media and communications studies in several other privately owned higher education institutions, such as the Southeast European University in Tetovo.

Several organizations, domestic and international, offer occasional short-term trainings, aimed to introduce journalists and other media professionals to the latest trends and journalistic techniques. MIM's School of Journalism organizes trainings on-demand, specially designed to meet

the identified needs of respective media organizations that requested them. Several international organizations and embassies organize study trips abroad. The bulk of such training programs focus on the changes to the media scene brought about by the emergence of Internet and other digital platforms, such as data-journalism or integration of user-generated contents. Trainings are also offered in areas of digital advertising, online security, production of multimedia content, etc.

Panelists note that, while such short-term trainings are useful, there are several problems. “There is a lot of that ‘Who are these people that think they can come and teach us about journalism?’ attitude,” says Violeta Gligorovska. Panelists also commented that, once the training was done, journalists that attended the training find it difficult to convince editors or managers to implement or apply the newly acquired knowledge of skills in their newsrooms or other departments. Also, there is a problem with transfer of knowledge to the other members of the newsroom. “Normally, when they come back, one would expect that they report what they learned and how they can help the other journalists acquire the same skills, but it rarely happens,” Sefer Tahiri said. Formal in-house trainings are rare, and journalists are expected to learn on the job, doing their daily duties. The public broadcasting service used to have such trainings for its journalists and other staff, but their status at this time is unclear.

There are no restrictions on imports of necessary materials or equipment necessary for media production. Recording equipment and editing software is increasingly accessible and affordable, thanks to the rapid technological progress and advancement of digital technology. Panelists note that there is a sufficient number of printing companies for the print media to avoid potential problems of refusal to be printed for political or other reasons. “If they say that they won't print you, you go to another printing company, there are plenty of them,” Zoran Dimitrovski said.

Panelists did note the problem with print distribution, which is monopolized by the largest publishing company MPM. Also, the problem persists with supermarket and other retail store chains that sell newspapers and other publications that refuse to sell certain dailies and weeklies because of political affiliations of their owners. The lack of must carry provisions in the Law on Audio and Audiovisual Media Services has resulted in a situation in which rates that cable operators' charge to carry individual broadcasters vary greatly in different areas of the country. Also, for the same reason, many cable operators in eastern parts of the country, which has a predominantly Macedonian population, do not carry some of the Albanian language channels, even those that air bilingual programs and, as noted earlier, are

increasingly popular across the ethnic division lines because of their objective and impartial reporting. Another issue that emerged with the digitalization of TV broadcasting was that, due to extremely high carrying charges on the multiplexes operated by telecommunications company ONE (it has since merged with other mobile telecommunications company VIP), all local TV broadcasters outside of the capital city of Skopje chose to change their licenses from terrestrial to cable broadcasting, to the effect that there are literally no terrestrial local TV broadcasters.

Macedonia has great coverage with broadband Internet, provided by both telecommunications companies and cable network operators. The Internet penetration, at over 60 percent, is among the highest in the region of Southeast Europe. Notably, over 40 percent of the citizens said in a recent poll that they mostly access the Internet using mobile devices—smart phones, tablets, etc. There are several companies that provide streaming services, used to cover major events, but in general, the good ICT infrastructure is underused. The panelists noted the gap between urban and rural areas, with some remote rural areas unable to receive anything but the terrestrial TV signal.

List of Panel Participants

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

Darko Cekerovski, journalist, Telma TV; member of the board, Independent Trade Union of Journalists of Macedonia, Skopje

Ubavka Janevska, journalist and editor, Duma.mk and Kanal 77 Radio, Veles

Gordana Duvnjak, journalist, *Utrinski vesnik*, Skopje

Sefer Tahiri, journalism professor, Southeast European University, Tetovo

Petrit Saracini, civil activist; journalist, TV 21, Skopje

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

Violeta Gligorovska, journalist and media expert, Metamorphosis Foundation, Skopje

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

Filjana Koka, journalist, Macedonian Radio and Television, Skopje

Dragan Antonovski, journalist, Lokalno.mk; acting president, Media Ethics Council of Macedonia, Skopje

Saso Mitnovski, owner, Super Radio; president, Association of Private Media of Macedonia, Ohrid

One journalist from a regional broadcaster wished to remain anonymous.

Moderator

Biljana Bejkova, executive director, NGO Infocentre, Skopje

Author

Dejan Georgievski, president, Media Development Center, Skopje

The Macedonia study was coordinated by and conducted in partnership with Media Development Center, Skopje. The panel discussion was convened on December 11, 2015.