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MACEDONIA

In 2009, Macedonia received a recommendation to begin negotiations to join the European Union (EU). However, Macedonia is in limbo in the process and the start of membership talks has been postponed, due to Greece's objections to the use of the name (Greece has a province named Macedonia). Macedonian citizens have benefited from a visa liberation process; since December 19, 2009, Macedonians have been able to travel in the Schengen countries without visas.

In late March 2009, Macedonia held presidential and local elections. The ruling party, Internal Macedonian Revolutionary Organization – Democratic Party for Macedonian National Unity (known by its Macedonian acronym, VMRO DPMNE), won both elections. Along with newly elected President Gjogje Ivanov, the vast majority of the municipal councilmembers and mayors belong to this party.

In the second half of 2009, Macedonia started to feel the consequences of the global financial crisis. In particular, the media was affected by sharp decreases in governmental advertising. MSI panelists noted that the lack of state funding for the media produced coverage more critical of governmental policies.

The panelists found that 2009 was a very bleak year regarding freedom of expression in general. In the small town of Struga, a group of intellectuals named Citizens for European Macedonia (GEM) were attacked when they attempted to organize a debate with Struga citizens. The attackers were a group wearing black caps; few details are known about their organizers. Later, a group of students protesting against the governmental decision to build a church on the capital's main square were attacked by an organized mob wearing orthodox Christian insignia. This attack was more violent than the Struga attack. In both cases, police brought charges against individuals on both sides, drawing protests from those who perceived themselves as victims. The Struga case is still pending. In the second case, the organizers of the protest were found not guilty, while the case against the mob that attacked them is still pending.

The panelists pointed to several examples that explained their concerns over the escalation of hate speech in 2009. Near the end of the year, the prime minister sent a letter to all the members of VMRO DPMNE, calling upon the party "to mobilize itself for the final battle against... transitional politicians, false intellectuals, etc." Immediately after that, one of the newspapers close to the government published a list of "traitors" who work in the interest of Greece. The list was composed of prominent journalists and intellectuals who had been critical of governmental policies.

MACEDONIA AT A GLANCE

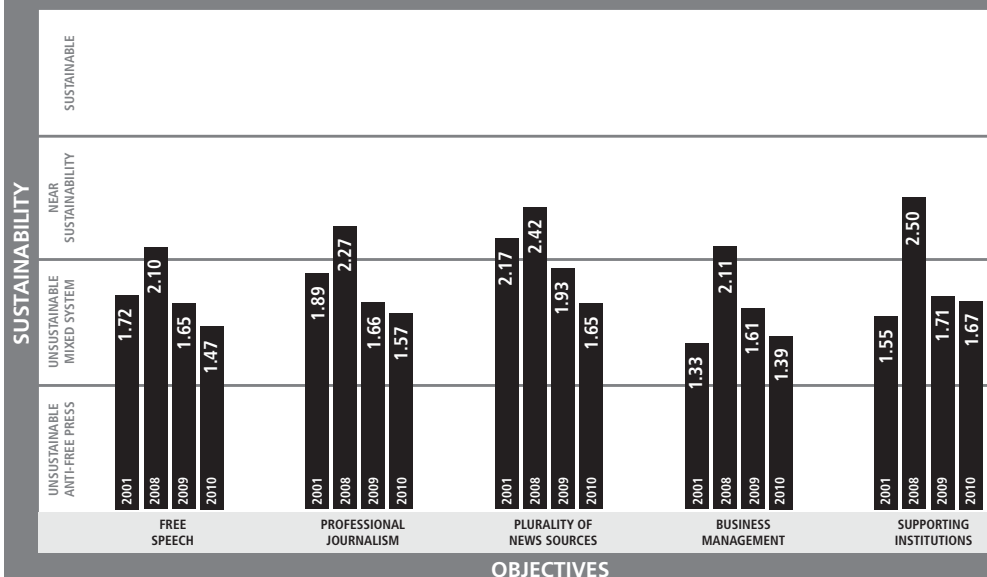
GENERAL

- > **Population:** 2,066,718 (July 2009 est. *CIA World Factbook*)
- > **Capital city:** Skopje
- > **Ethnic groups (% of population):** Macedonian 64.2%, Albanian 25.2%, Turkish 3.9%, Roma 2.7%, Serb 1.8%, other 2.2% (2002 census)
- > **Religion (% of population):** Macedonian Orthodox 64.7%, Muslim 33.3%, other Christian 0.37%, other and unspecified 1.63% (2002 census)
- > **Languages (% of population):** Macedonian 66.5%, Albanian 25.1%, Turkish 3.5%, Roma 1.9%, Serbian 1.2%, other 1.8% (2002 census)
- > **GNI (2008-Atlas):** \$8.432 billion (World Bank Development Indicators, 2009)
- > **GNI per capita (2008-PPP):** \$9,950 (World Bank Development Indicators, 2009)
- > **Literacy rate:** 96.1% (male: 98.2%, female: 94.1%) (2002 census)
- > **President or top authority:** President Gjorge Ivanov (since 12 May 2009)

MEDIA-SPECIFIC

- > **Number of print outlets, radio stations, television stations:** Print: approximately 600 daily, weekly, biweekly, monthly, and periodical editions. There are 146 commercial broadcasters (5 television and 3 radio stations with national coverage) and 2 nonprofit broadcasters. 47 television and 49 radio stations provide local coverage; 16 television channels broadcast via satellite. (Broadcasting Council, 2009)
- > **Newspaper circulation statistics (total circulation and largest paper):** Total average daily circulation is 252,372. *Vreme* and *Spic* are the largest daily papers (newspaper sources)
- > **Broadcast ratings:** Television stations: TV A1 (21.07 %), TV Sitel (11.6 %), and TV Kanal 5 (7.37%); Radio stations: Antena 5 (14.57 %), Channel 77 (8.51 %), and Macedonian Radio 1 (5.6%), (Broadcasting Council, 2008)
- > **Annual advertising revenue in the media sector:** €402.7 million, of which €389 million for television and €13.7 million for radio. (Broadcasting Council, 2008)
- > **News agencies:** Macedonian Information Agency (state-owned), MakFax (private), and NetPress (private)
- > **Internet usage:** 847,900 (2008 est. *CIA World Factbook*)

MEDIA SUSTAINABILITY INDEX: MACEDONIA



Annual scores for 2002 through 2006/2007 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

Unsustainable, Anti-Free Press (0-1):

Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2):

Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3):

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

Sustainable (3-4):

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

OBJECTIVE 1: FREEDOM OF SPEECH

Macedonia Objective Score: 1.47

The overall score for this objective dipped just slightly from last year's score of 1.65. Most of the individual indicators remained close to last year's scores and did not stray far from the objective average. Those departing from the average were indicator 8 (unrestricted access to international news), which scored close to a point higher than the objective average; and indicator 9 (entry into the journalism profession), which scored more than a half a point higher than the average, although it fell short of last year's score. Other significant drops were seen in indicator 5 (state or public media do not receive preferential treatment) and indicator 7 (access to public information); these two indicators also scored well behind the overall objective score.

According to the panel, Macedonia has constitutional and legal guarantees supporting freedom of expression, but the reality is far from living up to the legislative standards. When viewed with a broader perspective, this year's violent incidents—where authorities prevented certain groups from expressing their opinion—are a dangerous development against freedom of speech.

The media sector has seen some progress, especially in certain procedural aspects of implementing the broadcasting law. Positive developments included the regulatory body's action against cable operators, ordering them to pull pirated channels out of their packages; and instituting a model for co-regulation of video-on-demand services with operators. However, according to Saso Ordanovski, editor at Alsat TV, negative factors are still at play. "There is a high level of influence of the political center of power on the work of the regulators in this field, and in addition, the Telecom operators are applying new pressure."

Panelists also discussed the license issued for a Digital Video Broadcasting (DVB-T) operator. The telecommunication regulatory agency handled the procedure, even though the law grants this authority to the Broadcasting Council. This case was challenged before the constitutional court. The court decided that the case is not under its jurisdiction, and the DVB-T operator ended up with a license that was not granted in accordance with the law. Licensing procedures are influenced by various power centers within the society, panelists said. "Licensing of television stations continues, even though there is a need for a moratorium on new licenses because of the digitization process," said Zaneta Trajkovska of the Macedonian Institute for Media.

Last year's panelists were very concerned about the 17 new satellite television licenses issued; this year, panelists continued to be concerned that this "television station inflation" is hurting professional journalism in Macedonia, as media outlets simply do not have enough qualified journalists and technical experts to run stations properly.

Aside from the 5 percent VAT that print media pay (instead of the standard 18 percent), business regulations and the tax code do not differentiate between media and other types of businesses. Media are subject to additional taxation when they buy programs from countries that do not have agreements with Macedonia to avoid double taxation.

Physical intimidation continued in 2009. Unidentified harassers threatened the lives of the *Sega* editor and his family. The threat was reported to the police, but they did not react. A journalist from A1 TV, Mence Atanasova Toci, received threats following her reporting on one company's pharmaceutical imports. Following her report on the minister of justice, Katerina Canevska-Arsovska, another A1 journalist, was contacted anonymously and told that if she continued coverage of his performance in the government, she would face consequences "because the minister is a very powerful man." Macedonian journalists face numerous such threats; the examples that the panelists mentioned were simply the most visible in the media.

The public broadcaster, Macedonian Radio-Television (MRTV), has traditionally been financed through the budget instead of through the collection of broadcast fees. This resulted in total

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.

governmental influence on the newscast and other current affairs programs and MRTV has shown a complete bias toward the government and its policies. A system intended to secure independent financing was not established until the end of 2009, when MRTV finally began to collect the broadcasting tax. It is unclear as of the writing of this report if MRTV will become more independent or not.

Panelists were also concerned about the prevalence of hate speech in Macedonia. "Promoting religious and national hatred, fascism, and misogyny have become a regular part of the program for some media. Yet despite all of the incriminating evidence, there is not a single case in front of the courts," said Roberto Belicanec of the Media Development Center.

In contrast to their failure to prosecute hate speech incidents, the courts are efficient when it comes to prosecuting journalists in defamation cases, noted the panelists. Fortunately, the number of cases dropped this year, but *Vest* editor Naser Selmani said that the media have been altered nonetheless. "Last year's flood of cases against journalists impacted the media community greatly. Journalists got the message, and self-censorship is now standard in reporting," said.

Defamation is still part of the criminal code. This year, changes in the criminal code eliminated journalists' liability for publishing the statements of third persons given in front of the general public or at press conferences. The Association of the Journalists of Macedonia helped lobby for this change. The media community viewed this as an absurdity in the legal system; in previous years, two journalists were fined for reporting statements from press conferences. General liability for website content exists, but panelists could cite no such cases before the courts.

Government officials have established their preferences for certain media that are highly approving of their policies. They avoid any public appearance that may result in a critique of their work. Access to official information is also subject to preference, panelists said, with clear discrimination against certain media. "The problem is not in the selection of the media by the government; this selection is understandable. Problems arise when they target the major media outlets, intending to harm their credibility," said Branko Gjorgevski, editor of *Dnevnik*.

Media may access international without government or other interference. However, similar to past years, the panel complained that typically only the largest media outlets can afford to subscribe to foreign news services because most media are so strapped for funds. This imbalance became particularly acute in the past year, given the worldwide financial crisis, and scores for this indicator reflect a

significant drop. Journalists use the Internet freely to access foreign news sources, and media managers are able to secure reasonably priced Internet subscriptions for their employees.

Access to the journalism profession is relatively free, but many media outlets hire unqualified or poorly trained people.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Macedonia Objective Score: 1.57

While this objective dropped only slightly from last year's score of 1.66, some of the indicators changed significantly. Indicator 3 (self-censorship) and indicator 6 (balance of entertainment and news) dropped while indicator 4 (coverage of key events and issues) and indicator 7 (facilities and equipment) both increased noticeably and outperformed the overall objective score by more than half a point. Indicator 3 scored slightly more than half a point lower than the overall objective score.

The major conclusion regarding this objective is that media are striving to respect professional standards in reporting, but the level of professionalism is unsatisfactory. Journalists also have difficulty finding credible sources. "It is a hell of a job to maintain high standards—to be fair; unbiased; to achieve exclusivity and to find credible sources," noted Goran Momirovski of Channel 5. According to the panelists, journalists are aware that they deal with manipulative sources, and very often they fail to find second sources to confirm stories, but they feel forced to present the information as they receive it. Access to official sources is very limited, and the access to information law does not solve this 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).

Owners directly influence the editorial policies of news and current affairs programs, and their interests produce biased reporting. “Every editor, and probably almost every journalist, knows exactly what the interests of his employer’s owner are,” Ordanoski said. Traditional media cover almost every aspect of life, but the quality of the coverage is not satisfactory. They tend to address superficially most topics outside of politics or the economy.

Journalists do cover key events, despite hurdles in gathering information—from official sources in particular. According to the panel, new media mostly relay and comment on issues already covered by the traditional media. Some newspapers follow Twitter as a source for information. A very small number of specialized blogs cover certain topics neglected by traditional media.

Media outlets are considered to be highly biased politically, and that influences journalists’ everyday work. In practice, they are exposed to multiple pressures—professional, political, and financial. Job security is a major threat to professionalism; journalists often tend to breach professional standards in order to secure, and later to keep, their jobs. Salaries are not high enough to insulate journalists against corruption. Also, a substantial number of good journalists are ending up as spokespersons for government institutions or companies, lured by greater job security, higher salaries, and the possibility that such positions could lead to managerial or political careers.

Unlike previous years, light entertainment programs, soap operas, and reality shows are gaining publicity. The major television stations made a visible shift in program scheduling toward this kind of programming, especially as Macedonian media entered into Balkan-wide co-production of reality shows. Previous attempts to start this kind of programming failed because of low ratings, but now public demand appears to be rising. News is still popular, but demand is slipping.

Equipment used for newsgathering is mostly up to date, but “there is a lack of trained professionals who can use the equipment in its full capacity,” Trajkoska said.

The panelists lamented the absence of in-depth coverage and research. “We are covering daily events, and that is it. There is a lack of stories produced that are initiated by journalists and the media; we simply follow the daily agenda, and that is a big failure,” Selmani said.

Except for economic and sports journalism, broadcast media feature no significant quality niche reporting. However, Macedonia has several new specialized magazines on vehicles, interior decoration, celebrities, health, and women’s issues. The major newspapers have established regular supplements on health, vehicles, and entertainment, as well as material geared toward teenagers.

OBJECTIVE 3: PLURALITY OF NEWS

Macedonia Objective Score: 1.65

Overall, this objective slipped nearly a third of a point from last year’s score of 1.93. All indicators dropped but one: indicator 3 (state or public media serve the public interest), which remained the same but received the second-lowest of all indicators in the objective. Scores for indicators 2 (access to domestic or international media), 4 (independence of news agencies), 5 (independent broadcast media produce their own programs), and 6 (transparency of media ownership) fell significantly from last year’s scores.

The panelists agreed, however, that Macedonia has many news sources. Major media outlets include five nationwide television stations (one broadcast in Albanian and Macedonian languages), six major national newspapers, three national radio networks, and dozens of satellite television channels originating from Macedonia. In the panelists’ view, the core problem is that the market is overcrowded beyond sustainability, which opens the path to financial corruption of owners.

National newspapers and television stations are available and affordable, and Internet-based media initiatives have improved citizen access as well. From that perspective, one can say that Macedonians have unrestricted access to news. Still, the panel concluded that the plurality of news sources has not raised the quality of information available, given the lack of professionalism and the highly biased tenor of mainstream media.

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens’ access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

Citizens have access to international broadcasts via extensive cable networks through the IPTV platform and, since November 2009, through the DVB-T operator. In that sense, the panelists said, the previous problems surrounding the availability of foreign programming in rural areas will probably be solved through DVB-T. Regarding print media, foreign publications (except those from Serbia and Croatia) are generally available only in the capital, Skopje. However, other citizens access foreign outlets via the Internet.

Internet fees for broadband connections have fallen substantially, and the panelists noted an uptick in broadband users in the past two years. As reported in last year's MSI, large portions of the population still cannot afford bundled service packages of IPTV, ADSL Internet, and telephone, but they can subscribe to lower-cost cable packages. The problem is the low availability of cable service in rural areas. Social networking has become the number one media phenomenon; Macedonians have 400,000 profiles on Facebook alone.

The panel noted that MRTV fails to promote educational and cultural programming, even though it is obligated by law to offer such material. Furthermore, MRTV was the leading outlet that promoted the media lynching of Ljube Boskovski, the former internal affairs minister. He was accused of war crimes in front of the Hague tribunal (ICTY) and found not guilty. MRTV played YouTube material showing Boskovski's interrogation in front of the ICTY investigators, where he said that the field commander was entirely responsible for the alleged crime. MRTV labeled this video "Mr. Boskovski's Treason" and played it repeatedly. Although the legal provisions that regulate the broadcaster's work call for high professional standards, in practice, MRTV does not respect principles of institutional autonomy and balanced reporting.

Use of domestic news agencies is in the same decline as reported in last year's MSI, and the quality of the news they disseminate is questionable, according to the panelists. Makfax, one of Macedonia's two private news agencies, changed ownership in the last quarter of the year, and the panel noted some improvements in its service. The most relevant media use foreign agencies, but smaller outlets cannot afford the fees.

Although many broadcasters produce their own news programs, the panelists noted that the past year was marked by a high level of owner interference in the editorial process. In previous years, this was not the case—at least not on such a large scale, panelists said. The state-owned media focus

on promoting governmental activities, while private media are more diverse in their coverage. However, entertainment programming and sports make up most of the private media program offerings. Although the news is somewhat commercialized—and on certain television channels, openly biased politically—media diversity allows citizens to be relatively informed on current affairs.

Macedonians do host a few specialized blogs on new technology, archeology, and other very narrowly targeted topics. But in general, bloggers do not produce news—they either state opinions or pull news from other sources. In the panel's assessment, blogs lack serious content, and the blogging community seemingly still does not fully grasp the potential of blogs in this respect.

Macedonia has laws regulating media ownership, but the situation on the ground does not reflect this fact. A couple of large media groups are what is known as "paper clear"—showing no proof of ownership in official documents. The problem surrounding transparency is that implementation of the law is very shaky.

The panelists spoke of a court case revolving around the problem with monopolized media in Macedonia. Facing unfair competition, the country's largest newspaper company started an open lobbying campaign against three major media groups that are under the same ownership or have established synergy. This scenario led the EC to again name concentration of media ownership as one of Macedonia's most serious media problems. For the first time, the EC regulatory body involved the Commission for the Protection of Competition in some of the cases. In the beginning of February 2010, the first case on this issue against a radio group concluded, with the commission ordering the radio station to cease the joint sale of advertising time.

Macedonia has minority-language media in print and in broadcast format, as well as a specialized public broadcasting channel that broadcasts in a variety of minority languages. The minority media face unusual challenges achieving economic sustainability, as their audiences are drawn from a limited segment of the public. Mainstream media do pay attention to minority issues, but there are prejudiced and discriminatory voices in the media as well—including some that openly air or print hate speech. The Roma community has been especially outspoken against this problem.

OBJECTIVE 4: BUSINESS MANAGEMENT

Macedonia Objective Score: 1.39

For this objective, the overall score fell from 1.61 in the previous MSI. This year, most indicators slipped slightly; indicator 3 (advertising agencies support an advertising market), indicator 4 (portion of advertising in total revenue), and indicator 7 (broadcast ratings and print circulation) suffered the largest drops. On the other hand, the score for indicator 5 (government subsidies) rose slightly. All indicators scored close to the overall objective score.

In general, the media are operating in a transitional economy with long-lasting crises. Media outlets had noted huge income growth in 2008 and the first half of 2009, stemming from large-scale governmental campaigning that flooded the market with money. So although the state does not subsidize the media officially, governmental advertising can play the same role ultimately. "The strong link between government advertising and editorial policies of the media is visible, now that government advertising is substantially reduced because of the financial crisis. Major media have suddenly become more critical of the government," Belicanec said.

Newspapers have seen a substantial fall in circulation. The panelists pointed to the growing number of Internet users and the financial crises as major causes for the drop. An additional factor is the media's underestimation of new technologies and their usage. All media sectors were surprised by the sudden shift of audiences away from print and towards Internet use. The print sector was simply unprepared for the change and has been hurt badly. Broadcast media, which rely solely on advertising, have seen a decrease in income on the basis of losing viewers.

The major publishing outlet, Media Print Macedonia (MPM), announced that it is working on a new strategy based on the full utilization of new media. Media observers expect that new business models in these media will be introduced in 2010.

Advertising agencies are thoroughly focused on the capital-based media, and mostly on television and print. Almost all of the major agencies are franchises of foreign agencies. Last year, a new agency devoted solely to Internet advertising gained visibility. But larger agencies still do not recognize the potential of Internet advertising, nor do the media.

In the panel's view, advertisements are not produced professionally for the most part. This is especially true of small television and radio stations that improvise ads for small businesses in their towns, and of some of governmental campaigns, such as an anti-tobacco campaign that inadvertently appears to promote smoking.

The legal limit for broadcast advertising is 20 percent of the total air time. This is typically entirely filled; if there is lack of advertisements, the time is used to promote other business interests of the outlet's owner. In print, the ratio is between 15 and 25 percent, depending on the newspaper and the issue.

The broadcast ratings system is under constant dispute. Some of the main television stations simply do not accept it as relevant fact-finding research. They constantly complain about the sampling and the packaging of data. The agency that measures ratings, an affiliate of AGB-Nielsen, to date has not even tried to gather all of the interested parties to open up discussion on the credibility of the system. Radio broadcasters are discontented as well; the introduction of People Meters on the market in 2007 left radio outlets without any rating system upon which to base their advertising sales.

The panelists cited some progress in all media sectors with regard to tailoring programming to the commissioned ratings, but this effort is still rudimentary. The media has a widespread problem with lack of understanding of rating figures and how to respectively apply to programs. This is a major shortcoming of current television station management, according to the panelists.

The situation is similar in the print sector. Correct circulation numbers are generally not known. Newspapers tend to hide their numbers from each other and present inflated circulation figures to their advertisers. "For instance, the owner claims the circulation is 47,000 copies—you can see that printed on the printing press counter—but how much is actually sold remains unknown," said Robert Popovski, from Channel 5. The press sector has no rating system; media simply claim circulation based on the number of printed copies. However,

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

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

some agencies and newspapers are negotiating to establish a mutual, credible measurement system.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Macedonia Objective Score: 1.67

In many respects, the situation regarding supporting institutions in Macedonia neither improved nor worsened dramatically, so the scores for all indicators remained approximately the same, and the overall score for this objective was virtually unchanged. Given the ongoing absence of any trade associations to advocate for industry interests, indicator 1 again scored more than a point less than the overall score. Most of the other indicators scored near the overall score, with the exception of indicator 6 (sources of newsprint and printing facilities) and indicator 7 (channels of media distribution), which both scored about a half a point higher than the overall score for this objective.

The Association of Private Print Media and Association of Private Electronic Media of Macedonia are no longer active. They collapsed due to the divergent interests of media owners. There is no new initiative for re-establishing either association. Macedonia has no active trade union that represents the rights of media industry workers. Camera operators created an association, but it has shown no public activity. Therefore, the scores for the indicators measuring professional and trade associations remain quite low.

This void left a playground for state policymakers to act as they see fit, without any pressure from the media industry. "The Ministry of Culture made quite a lot of play with the broadcasters during the drafting of the copyright law. Left without representation of the whole industry, media outlets were called upon to comment individually on the draft. At the end, it became clear that they [the Ministry] just used them as façade to demonstrate transparency of the process. Not one issue concerning the media had been solved in the media's interest," said Belicanec.

Legislators have initiated work on a copyright law in order to align Macedonia's domestic legislation with European legal norms. The law is still being drafted, and the procedure remains closed.

The Association of Journalists of Macedonia (AJM) is undergoing a troublesome restructuring, initiated by a group of journalists who were unsatisfied with the association's efforts related to media ownerships and labor issues. The association has drafted new statutes that await adoption. AJM's ethical commission had been very active in the past year, raising awareness about instances of hate speech, and

attempting to improve professional reporting standards. However, AJM's president resigned at the end of the year, citing the association's failure to change.

Some NGOs continue to support the media and journalists, but the overall climate regarding NGOs has not improved since last year. Aside from the Media Development Center, which has been lobbying and advocating for media policy change, there are no NGOs focused on media issues. Major donors have left. A small amount of donor funding is available from the Open Society Institute (OSI), the NGO Info-Center, the Helsinki Committee, and other NGOs focused generally on human rights issues.

Formal education opportunities for journalists include university-level courses on journalism and public relations offered by the Macedonian Institute for Media (MIM). State universities also provide journalism courses. In addition, several privately owned universities offer journalism and communications studies.

Considering shorter, mid-career training courses, Trajkovska noted, "Media are not ready to invest in the courses; they expect that to be covered by grants." Therefore, this kind of training is typically organized only if a donor is willing to cover the cost of the training course. As donor interest has faded, such programs are almost non-existent, outside of MIM training courses. The panelists said that training is especially needed in new media, on both the content and management sides. The media sector also lacks professional staff and trainers in new media. Other areas in need of outside assistance including institutional support to AJM, media policy projects, professional solidarity projects, media management training, and training on the social responsibility of the media.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

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

Newspaper companies own Macedonia's printing facilities and distribution systems, which the panel said are considered efficient and adequate to satisfy the current needs of the print media. According to the panel, these two aspects of the media sector are relatively apolitical and the government does not impose any restrictions on either.

Generally, distribution systems, including those for broadcast, are privately owned. The same is true for Internet and telecom providers. The government is a lesser partner in the major telecommunication company, but the panel said that the state does not generally use this position to interfere with service availability or to imply special rules for service. The panelists pointed to one notable exception: when the government pushed the telecommunications regulator to discriminate against broadcast media in the bid for DVB-T frequencies. Only telecommunication operators were eligible to apply.

At this point, analog transmitters are in private hands. In the future, they will rely on telecom operators for the initial transmission of their service. During the analog/digital conversion period, if the government continues to discriminate against broadcasters in favor of the telecom operators, economics-based censorship might emerge. The possibility exists because legislation that would guarantee access to networks does not exist.

List of Panel Participants

Robert Popovski, president, Association of Journalists of Macedonia, Skopje

Naser Selmani, editor, *Vest*, Skopje

Goran Momirovski, reporter, A1 TV, Skopje

Sasho Ordanovski, general manager, Alsat-M TV, Skopje

Roberto Belicanec, executive director, Media Development Center, Skopje

Mira Kostic, reporter, *Macdonian Radi*, Skopje

Zaneta Trajkoska, director, Macedonian Institute for Media, Skopje

Irena Arnaudova, TV M, Ohrid

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