

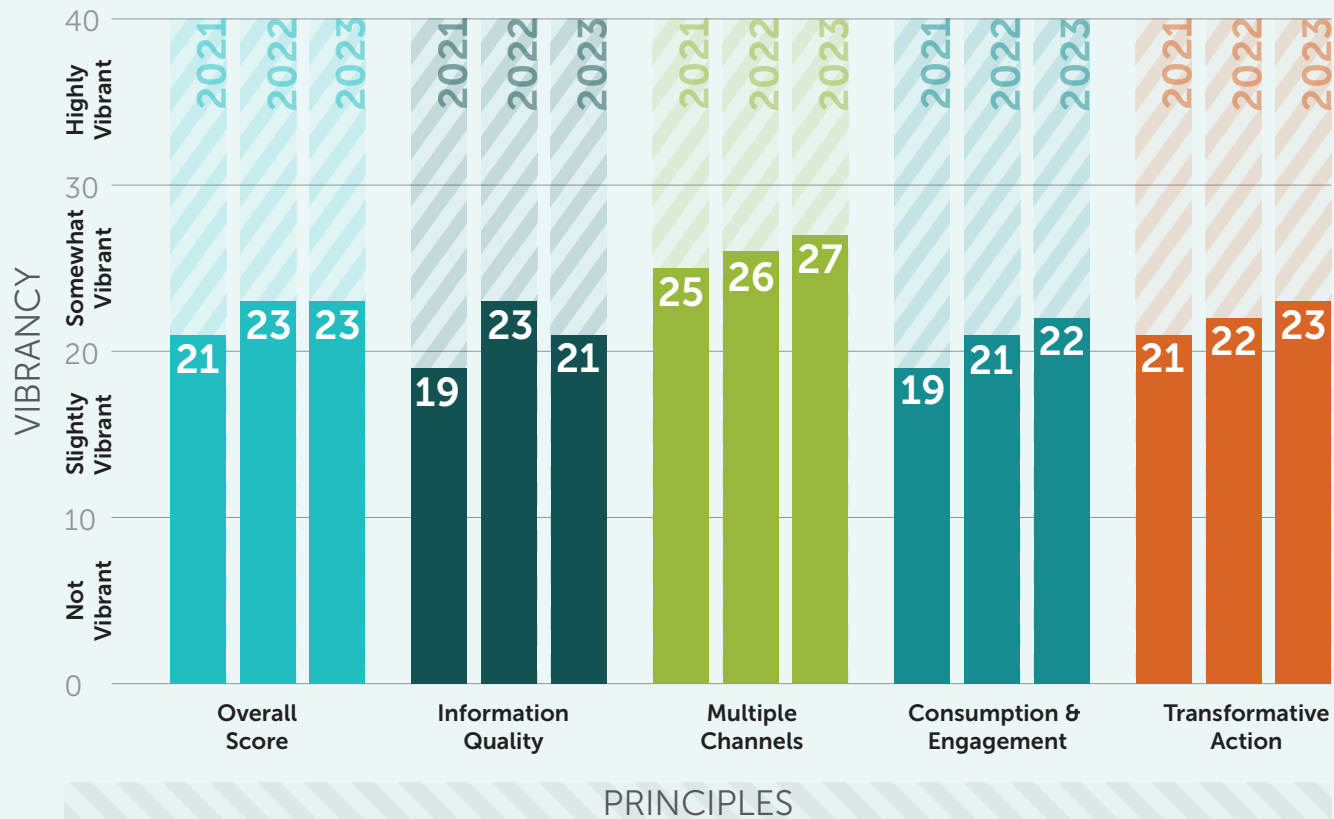
NORTH MACEDONIA



Vibrant Information Barometer

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Highly Vibrant (31-40): Quality information is widely available in this country. People have the rights, means, and capacity to access a wide range of information; they recognize and reject misinformation.

Somewhat Vibrant (21-30): Quality information is available in this country and most of it is editorially independent, based on facts, and not intended to harm. Most people have the rights, means, and capacity to access a wide range of information, although some do not. Most people recognize and reject misinformation, although some do not.

Slightly Vibrant (11-20): Quality information is available on a few topics or geographies in this country, but not all. While some information is editorially independent, there is still a significant amount of misinformation, malinformation, and hate speech in circulation, and it does influence public discourse. Most people do not recognize or reject misinformation.

Not Vibrant (0-10): Quality information is extremely limited in this country. The vast majority of it is not editorially independent, not based on facts, or it is intended to harm. People do not have the rights, means, or capacity to access a wide range of information; they do not recognize or reject misinformation; and they cannot or do not make choices on what types of information they want to engage with.

Highly Vibrant

Somewhat Vibrant

Slightly Vibrant

Not Vibrant

OVERALL SCORE

23

For the media sector, 2022 amounted to yet another year of waiting for the sector’s much-needed reforms to start. The energy emergency and related economic crisis, caused by the Russia’s invasion of Ukraine—along with obstacles to North Macedonia’s progress toward European Union membership stemming from Bulgaria’s objections—meant that, once again, little would be done to remedy the problems facing the country’s media sector.

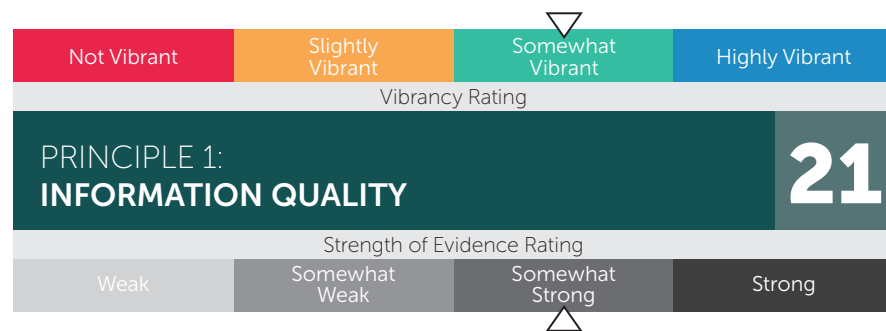
Sustainability remains the main challenge, and VIBE panelists dedicated much discussion to initiatives by media owners—but also by journalists, editors, and other media professionals—to secure some form of public funding or support beyond the current subsidies program covering the print media. Other key concerns include media literacy and disinformation and misinformation campaigns, especially those related to the Russian invasion of Ukraine and the ongoing dispute between North Macedonia and Bulgaria over recognition of a separate North Macedonian state and a separate Macedonian language.

In July 2022, the government announced that it accepted the so-called French Proposal, an agreement that aimed to remove the Bulgarian blockade of North Macedonia’s integration into the EU, and the political struggle shifted to the issue of listing the Bulgarian community in North Macedonia’s constitution—a challenge, as the change requires the support of a two-thirds majority of all MPs, which is impossible without the consent of the parliamentary opposition. The public and the media also followed with great interest the developments surrounding the establishment of Bulgarian cultural centers in several towns in Macedonia, but also the Macedonian cultural center in the town of Blagoevgrad, in Bulgaria.

The rising costs of energy caused by the war in Ukraine drove price hikes across the board, and the rising costs of living hit North Macedonians hard—with an 18.7 inflation rate in December 2022, accompanied by a 15.1 percent increase in costs of living. The media focused much of its attention on the effects on the everyday life of citizens and on the government’s efforts to secure the best possible energy deals for the coming winter.

The country’s 2021 official census results, shared in March 2022, showed that the total residential population dropped from 2.07 million in 2002 (the year of the previous census) to 1.81 million in 2021. Immigration to Western European countries has long been identified as the major concern for the country; some public opinion surveys have found that up to half of the young people would like to leave the country.

The overall VIBE country score remained the same as the 2022 study, with a score of 23. For three of the four principles, small improvements in scores were recorded. However, Principle 1 (information quality) scored 21, a drop of a couple of points from the 2022 study, illustrating the main points made by the panelists: the prolonged sustainability issues and absence of a secure, stable funding model that denies the media proper resources; the audience migration to unregulated online platforms, which continue to grow into major sources of news and information despite lax ethical and professional standards; and the society’s polarization, which makes discussion and communication difficult and nearly impossible. Another notable observation is that the quality of information may not have significant effect on citizens’ choices, decisions and actions.



Overall, North Macedonians have access to quality media content, but a clear division exists between the traditional and new online media and platforms in terms of information quality and adherence to ethical and professional standards. The media's ongoing sustainability crisis also means that journalists increasingly struggle to secure sufficient resources to perform their duties adequately.

The indicator addressing the media's overall inclusivity and diversity, received the highest average score for Principle 1 (27), while the indicator exploring the level of resources for content production, got the lowest average score, 14.

Indicator 1: There is quality information on a variety of topics available.

North Macedonia has the necessary infrastructure to produce quality content. The 43 television and 63 radio stations (covering the national, regional, and local levels with terrestrial, cable, and satellite platforms), 21 print media outlets (four dailies and two news magazines, plus other periodicals), and about 200 online news sites ensure, for all practical purposes, that the public has access to quality information. However, many media lack the funds to invest in the latest technical and technological production solutions, forcing them to rely on older technology and studio facilities.

Quality varies greatly in the oversaturated media landscape. The panelists drew a clear distinction between traditional, mainstream

media (broadcast and print) and online media, with the former leading the way in terms of quality. All major broadcasters have adopted the approach usually reserved for public broadcasting services and pay equal attention to informing as they do to entertaining the public. Still, the panelists recognized a number of online newspapers, particularly several specialized investigative journalism websites, that adhere to the standards and best practices of legacy media and offer information content of the highest quality.

Although several universities have journalism schools and departments, the panelists noted some concerning trends. Primarily, mirroring a global trend, fewer and fewer young people seem to be interested in journalism, discouraged by the low salaries and uncertain career prospects. Additionally, those schools now focus increasingly on public relations courses, which are in far greater demand—a rising preference reflected by the migration of many experienced journalists for better-paid positions in public relations. Surveys conducted by the Independent Trade Union of Journalists consistently find that close to half of all journalists would like to leave the profession if possible.

Various civil society organizations (CSOs) offer occasional trainings covering a variety of topics—specialized coverage, online safety and security, use of new technologies or formats, investigative journalism, etc.—which panelists noted are useful but tend to be dictated by donor agendas and not necessarily the needs of journalists and newsrooms. “It is fine that we have trainings in investigative journalism techniques. I would like to see also some trainings focused on basic reporting skills, which seems to be in decline with the young journalists,” said Nazim Rashidi, editor at cable broadcaster TV 21.

The divide between traditional and online media is also evident in the approach and adherence to professional ethics, with the latter seen as far more unconcerned with ethical issues—an impression backed up by the Council of Media Ethics, a self-regulatory body, which reports that online media account for the bulk of complaints received. In spite of self-regulation efforts, panelists noted that unprofessional reporting, as well as the spread of hate speech or misinformation, bring few consequences. “It is limited to some form of moral sanction, which is not enough. In

reality, publishers and journalists caught red-handed care little, and some more tangible sanctions may be needed,” commented Petrit Saracini, of the Institute for Media Analytics (IMA).

Journalists, in general, tend to hold the government—on all levels—accountable. Still, the newsrooms tend to focus on national government and parliament, dedicating far less attention to anything that goes on outside the capital city of Skopje. Few media outlets have networks of correspondents from smaller towns and cities, and foreign affairs coverage relies almost fully on material available from foreign media and wire services (which only the largest broadcasters can realistically afford). Even for such major events as the Russian invasion of Ukraine, only one daily sent a special correspondent to Kyiv. Several freelance journalists who traveled to Ukraine noted that their pitches for war zone stories attracted little, if any, interest from media outlets.

Specialization among journalists has also suffered, as they are expected to cover whatever topics editors may send their way. Specialized journalism, especially investigative reporting, has moved almost completely online; there are also a number of quality websites dedicated to economic affairs, culture, new technologies, etc.

Panelists also noted that the prevalent trend toward superficial coverage often leaves audiences without the contextual underpinning a story. As an example, they pointed to the coverage of a decision by health authorities to ban a certain dairy product. “Everybody reported that the yogurt was dangerous and was removed from stores. What was so dangerous about it, what kind of damage to human health could it do? What were possible consequences? Hardly anyone reported those aspects,” said Stevo Basurovski of Tera TV, a regional cable broadcaster from Bitola, in southwestern North Macedonia.

Indicator 2: The norm for information is that it is based on facts. Misinformation is minimal.

Broadcast and print media are far less likely than online media to spread misinformation or disinformation, although a limited number of online media adhere to the best standards and practices established by the

traditional newsrooms. Panelists noted that except for a handful of investigative journalism newsrooms, there are no internal fact-checking departments or offices in the media to conduct pre-publication fact-checking. Deepening the problem, the speed of today’s news reporting and shrinking newsrooms contribute to a situation in which media and journalists are more susceptible to making mistakes.

Fact-checking and debunking of incorrect or false information is mainly done post-publication by a handful of fact-checking CSOs. According to the panelists, they do a good job, but their societal reach and influence is limited. Some panelists commented that mainstream media are completely disinterested in debunking content. “We have had the good fortune to secure a spot for a 10-minute debunking program on AlsatM TV,” commented Saracini, whose organization, IMA, runs a fact-checking program. “We have excellent ratings, on par with the popular Turkish telenovelas. It shows that the people like to see when someone is caught lying,” he added.

The situation is much more critical in the online domain, especially social networks, which seem to be the platforms of choice for various malcontents and people with questionable ethics, who often act as hired hands for other actors, foreign and domestic. Panelists noted that, with the exception of the Embassy of the Russian Federation’s Twitter account, there are no examples of a foreign government engaged in hate speech or other forms of prohibited expression. However, Bulgaria and North Macedonia routinely trade accusations of hate speech and misinformation campaigns—part of a long-running dispute that has intensified amid Bulgaria’s objections to North Macedonia’s EU accession.

Indicator 3: The norm for information is that it is not intended to harm. Mal-information and hate-speech are minimal.

The panelists traced the perceived prevalence of misinformation and hate speech to the country’s deep divisions along ethnic, political, and ideological lines. “For the opposition, everything that the government says is a lie, and vice versa,” said Naser Selmani, editor-in-chief of ZOOM.mk online newspaper.

Still, the mainstream media, especially the numerous political talk shows aired by all national television broadcasters, make every possible effort to give representatives of all perspectives a chance to present their views and positions. Existing divisions, especially along ethnic lines, greatly limit the quality of information accessible to various ethnic groups, while audiences are denied the whole story.

Panelists do not think the government intentionally uses misinformation or hate speech but said it prefers to spin information, as part of its need to control the public discussion on any given issue. “Since I come from the field of public relations, from that point of view their statements are fine. From the point of view of providing full information to the public, not so much,” said Tatjana Loparski, director of Element PR agency.

According to the panelists, people who spread misinformation, hate speech, or other types of harmful expression face serious consequences, professional or otherwise, and prosecutors rarely act to pursue instances of hate speech. However, some panelists noted that people often label statements and expressions they disagree with as hate speech or extend their meaning to cover a number of other offenses and non-criminal actions, such as insult, libel, and slander.

Indicator 4: The body of content overall is inclusive and diverse.

Media offerings are available in all major languages and formats needed by the citizens, thanks primarily to the public broadcasting service MRT, which broadcasts programs in nine languages domestically (the highest number of domestic-language services in Europe). Numerous media outlets also publish in Albanian, the language of the country’s second-largest ethnic community. Commercial media in the languages of smaller ethnic communities find themselves in a far more precarious position; the panelists noted that many were forced to shut down because of sustainability issues.

“**Fewer and fewer young people seem to be interested in journalism, discouraged by the low salaries and uncertain career prospects.**”

Mainstream media make a special effort to ensure that different ethnicities are represented on their political talk shows. However, that usually refers to the major non-majority Albanian community, while representatives of other smaller ethnic communities—such as Turks, Romani, Serbs, Vlachs, and Bosniaks—appear much less frequently and are usually invited on specific dates or events of significance for their respective communities.

The mainstream media approach issues related to gender balance in a similar fashion, although it is clear that middle-aged men make up a majority of the commentariat and pundits invited on political talk shows. Gender imbalances in media ownership, management, and the editorial staff persist as well. For broadcasting, women continue to make up most of the journalistic workforce, while men continue to dominate leadership and managerial positions. The online media situation is harder to determine, due to a dearth of proper research data, as well as the lack of transparency of ownership or managerial structure in the online newspapers and news sites.

Marginalized groups are not represented well enough in the media. For some historically targeted groups that have endured discrimination and violence, such as the LGBTQ+ community, interest may increase in response to cases of physical violence against them or their property. However, panelists pointed out that although the online domain and the social networks provide a platform for verbal attacks, they also offer a chance for marginalized groups to create their own systems of information and exchange, including websites operated by human rights organizations or social network groups and pages dedicated to those issues.

Indicator 5: Content production is sufficiently resourced.

The panelists traced most of the problems related to the quality of media content to low resources and the media sector’s poor sustainability. The hundreds of media—broadcast, print, and online—all expect to survive

and thrive on total advertising spending of about €33–35 million (\$38 million). Sources in the advertising industry point out that, at least for broadcasting, a significant share of the total media buying by advertisers in North Macedonia flows outside the country, who either want to enter a new market or they have a new product for the international market. Thus, while advertisers spend a total of approximately €24 million (\$26 million) on television airtime, only €17 million (\$18.6 million) benefits the national market. The proportion may be higher for digital advertising, with all estimates indicating that the big technological companies (including Google and Facebook) control about 60 percent of the total digital advertising spending in the country.

Panelists agree that commercial advertisers mostly distribute their budgets evenly, paying attention to cover as many media as possible, and that political concerns may have little influence on their media buying decisions. On the other hand, they do agree that the media take care not to anger major advertisers. One panelist shared a personal experience: “We reported some problems with a local company that is an important advertiser for us. The same day, they terminated the contract. They tried to sell us a story that the decision was made at the start of the month, but I am certain it was because of that report,” said Suzana Nikolic, editor and owner of the local online newspaper kumanovonews.com in Kumanovo, in North Macedonia.

It should be noted that, as far as media investments go, news and information receive the most resources. In North Macedonia’s highly politicized and polarized society, covering news and current affairs also helps media owners maintain political relevance, which is important for securing lucrative state contracts. Furthermore, the traditional media have at their disposal only small funds for procurement of expensive, popular, quality television drama series or sports rights. Despite some movement—especially after the emergence of the first local online streaming service, “Gley”—investment in the production of quality television drama or comedy series is almost nonexistent. Another trend evident over the past

several years is reliance on cheaper “daytime television” formats and transplantation of classic radio formats, such as call-in shows, directly to television.

Sales of advertising space remains the main business model for the media, except for a handful of online investigative journalism newsrooms financed exclusively with donor funding. Some panelists noted that because the available advertising spending is not nearly sufficient, many media outlets have learned to search for alternatives. “For many, project funding from some donors is an important source of financing. Especially for smaller local media, a good project can cover lots of needs,” said Zoran Madjoski, journalist and owner of “Radio G,” a local station in Gostivar, in western North Macedonia.

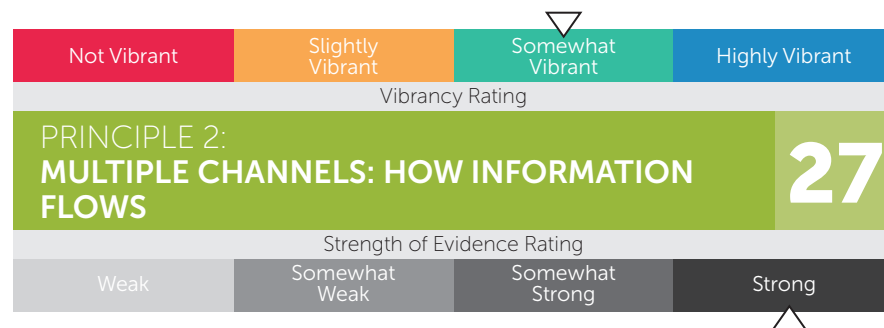
The panelists dedicated a lot of attention to the availability of public funding for the media. For now, only the print media receive government subsidies (covering parts of printing and distribution costs), and panelists concluded that the linear distribution of funds under that program prevents any political meddling — and that the program has distorted the market positively, as it practically guarantees the survival of print media. The possibility of a similar subsidies program for the broadcast media emerged as a major topic of discussion in the media sector in 2022. The five national terrestrial broadcasters launched

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an initiative to abolish legal provisions that prohibit “government advertising” and to reintroduce the possibility of media buying for public information campaigns—a proposal that divided the panelists. Memories from the years of previous authoritarian government, when public funds were abused to “purchase” the loyalty of the media, are still fresh, and

many are rightfully hesitant to give the government such a powerful instrument. The panelists that come from broadcast media, however, support the plan. “I don’t think it would be a distortion of the market. It is not just adding money to the market that distorts it. Taking away money from a market also distorts it,” said Rashidi.

In any case, the panelists agree that the distribution of such funds would have to be transparent and follow strict rules to avoid, to the extent that is possible, past abuses of public assistance programs and public information campaign practices. At the very least, panelists agree that any investments of public funds should go toward the production of quality content and not simply to “save” the media that would otherwise go under.



North Macedonia’s citizens enjoy the right to free expression and speech fully, with access to different and varied information channels and without fear of censorship. Laws also support their right to access information, although the system is not without glitches. Serious questions persist, however, regarding the independence of information channels.

The indicator examining access to channels of information received Principle 2’s highest score (31)—reflecting North Macedonia’s robust information space—while the indicator looking at the independence of information channels the principle’s lowest average score of 18, indicating political and media outlet financiers’ influence on editorial content.

Indicator 6: People have rights to create, share and consume information

People in North Macedonia hold the right to create, share, and consume information, with freedom of speech and media protected by laws

including a constitutional guarantee prohibiting censorship. All evidence indicates that the laws are implemented impartially and equally, and there is no evidence to prove the contrary.

The government makes every effort possible to avoid even the slightest suspicion that it may try to curb freedom of expression. Panelists agreed that the government, while making all efforts to ensure that its messages and agenda dominate the public discourse, has not engaged in direct or indirect censorship, and in that area, the situation is much improved compared with the rule of the previous government. Similarly, the government does not exert pressure on information and communications technology (ICT) service providers to do its bidding.

Yet fears concerning self-censorship persist. “Self-censorship, in my mind, is the second name for Macedonian journalism. It should be included as a course in journalism studies, if you ask me,” said Katerina Dafcheva, a journalist at TV VIS, a regional broadcaster in the country’s southeast region.

Indeed, various forms of pressure on journalists and media continue, including a growing number of defamation lawsuits, reversing the falling trend of the previous several years. On the other hand, North Macedonia has decriminalized defamation, and journalists face no threat of being targeted for prosecution for their reporting (other than civil defamation suits).

Media owners and managers pressure journalists equally, according to some panelists, who underscored attacks on labor rights and poor working conditions as serious cause for concern. “Our members are constantly under pressure. Even those on sick leave have learned that they are constantly monitored. God forbid that you publish a photo of yourself someplace other than your home while on sick leave. They even use geotagging for photos published on social networks to see if their employees stayed at home during sick leave,” said Pero Momirovski, a journalist and activist with the Independent Trade Union of Journalists and Media Professionals.

Instances of journalists being targeted by threats and insults, usually over social networks, also persist—and fail to elicit an adequate response

from the relevant authorities. “In spite of prominent campaigning and trainings on journalist safety for competent law enforcement institutions over the past several years, the rate of resolution of cases of harassment of journalists remains low,” commented Lazar Sandev, a partner at a law firm specializing in freedom-of-expression cases. That was the case with the beating of journalist Zoran Bozhinovski (whose status as a journalist has been challenged, amid accusations of unethical conduct) by several assailants in September 2022; the investigation has so far failed to identify the attackers or produce charges against anyone. Panelists did note that an agreement was reached with the public prosecutor’s office to designate one prosecutor who will be charged with investigating all attacks on journalists.

Although some panelists praised a coming change, expected in early 2023, to the criminal code that will qualify attacks on journalists as an “attempt to prevent an official person from performing its tasks and duties,” others opposed the idea, noting that other European countries do not include that specification. “It may not exist anywhere in Europe, but I do believe it will help increase the safety and security of journalists,” Momirovski commented.

The panelists could not think of a case that challenged legal protections for confidentiality of sources, although they did note that journalists frequently get questions like “Who told you that?” or “Where did you get that information?” Such questions have, so far, failed to stir legal action or court rulings ordering journalists to reveal their sources.

Indicator 7: People have adequate access to channels of information.

Citizens have more than adequate access to channels of information. North Macedonia enjoys excellent ICT infrastructure and coverage, with internet penetration covering about 85 percent of the population. Broadband internet is available across the whole country, although several panelists expressed concerns about an urban/rural divide—noting that mobile telephone reception, for instance, may be a problem for some remote, sparsely populated mountainous regions. Digital terrestrial television is available throughout the country, and cable

(DVB-C), IPTV, and satellite (DVB-S) networks account for approximately 95 percent of the access to television content.

Most citizens name television and online sources (including social networks) as their main sources of information, according to the latest surveys. For instance, a 2020 [study prepared by the RESIS institute](#) shows equal number of respondents pointed out at TV and internet as their main sources of political news. The [latest national poll conducted by IRI Macedonia](#) (the national office of the International Republican Institute) in September – October 2022--while placing TV and internet as main sources of political news--gives clear advantage to TV as primary source of political news. Internet and cable television services adapt their pricing to the low purchasing power of the citizens, who usually can access more than 60 television channels (domestic and foreign) for about \$10 a month. Most cable operators provide bundled services (cable television, internet, and telephony), which may be problematic in the event of outages. However, the widespread use of mobile phones indicates that there is at least one distribution channel available almost universally.

Offerings for people with disabilities, especially those with impaired sight or hearing, remain limited. Only the biggest and wealthiest television broadcasters can afford to hire sign-language translators—and even then, their services are limited to news broadcasts, although the government provides a sign-language translator at its press conferences. There is no special subtitling intended for people with impaired hearing.

In more conservative rural communities, panelists noted, women and girls may have limited access to new technology or little say in household media choices. However, Aleksandra Temenugova, a program coordinator at the Institute for Communication Studies in Skopje, provided a different perspective, commenting: “I remember that we were doing a report on one of those communities, and there were all these girls in traditional folk dress, all focused on their smartphones.” An urban/rural divide may be present, especially in remote mountainous areas, in terms of accessibility of some platforms or range of services available.

Indicator 8: There are appropriate channels for government information.

North Macedonia has a Law on Free Access to Public Information that is considered to be among the best in Europe. The new government, in a move to distance itself from its autocratic predecessors, adopted an Open Government Partnership strategy that follows principles of radical and active transparency. The Agency for Protection of the Right to Free Access to Public Information reported just six complaints in 2022—all positively resolved in favor of the plaintiffs who filed complaints against institutions that restricted access to public information.

Panelists expressed concern, however, that government and state institutions rarely update the newly established online databases and websites with new information as intended under the radical transparency policy. In its 2022 annual report, the agency issued a reminder to all institutions, listing the information they must publish on their websites as part of their active transparency obligations. The institutions, however, seem to be selectively transparent, according to some panelists. “The impression is that the transparency is more of a formal kind. When you ask them something, the institutions tend to give you only the information that suits them best,” Dafcheva said.

The panelists also called out institutions moving to preempt or “kidnap” a story, an especially common tactic when journalists ask questions that require responses from several institutions. While the journalists wait to hear back from all the sources, one of the institutions organizes a press conference, releasing the information to all media in an effort to give a story a positive spin.

Citizen awareness about freedom-of-information (FOI) rights remains unclear. Past surveys conducted by the Centre for Civic Communications (CCC) showed that CSOs account for the vast majority of FOI requests.

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CCC representatives say that, while they do not include that type of data anymore, their findings from recent years show that CSOs may file up to 80% of all FOI requests filed in the country, with ordinary citizens in very distant second place. CCC representatives also add that the journalists, according to their findings, do not use the FOI request as a tool in their reporting or investigations enough. However, it may be possible that journalists have filed requests for information while not identifying themselves as journalists. Although the panelists agreed that no groups face systematic or intentional denials, they also said that practices to inform citizens about opportunities to participate in public discussions surrounding new policies or legislation and comment on proposed

bills are insufficient and often fail to inform the very people they were intended to reach.

Journalists who have decided to switch to public relations, in search for better pay and working conditions, fill most spokesperson positions in government and state institutions, the panelists noted—adding that often, former colleagues appear most eager to manipulate the journalists. “In general, it is a mistake to appoint journalists as PR specialists. Journalists often think it would be easy for them to move into public relations, but these are completely different disciplines,” said Loparski, who is also a former journalist.

Indicator 9: There are diverse channels for information flow.

North Macedonia, with a multitude of media, offers many and diverse information channels. Strict legal provisions regulating ownership concentration produce both positive and negative effects, per the panelists. On the positive side, they foster strong media pluralism. A negative consequence, though, is that there is not enough funding to support the crowded field—leading to low levels of sustainability, which adversely affects the quality of content. “Some of the provisions to

prevent media concentration are too restrictive and need to be changed. I don't know what we are waiting for," Selmani commented.

Ownership transparency obligations apply to broadcast and print media alike under the Law on Media, which requires all outlets to publish data on their ownership, management, and editorial structures on a quarterly basis. The panelists, however, called the decision to leave the online media outside such regulatory obligations a mistake, noting that many online media continue to publish without proper masthead information to allow audiences to see the media's backers. It also renders their "standing to sue (or to be sued)" practically nonexistent, allowing bad actors to publish unethical and harmful information with impunity.

The panelists did not note any cause of concern regarding possible monopolies in the area of media distribution. There are numerous providers of cable and IPTV services and internet service providers, although three companies emerged as dominant forces in the market, both in terms of numbers of users and quality of services. The allocation of frequency spectrum needs to change from the current policy of allocation of all free capacities to a more reserved policy that would account for both the size of the market and the needs of the audiences for quality audiovisual content, contributing to much necessary consolidation of the audiovisual broadcasting market. Panelists noted that the audiovisual media services regulator (AVMU) lost a case brought against it over the decision not to open a public call on an initiative of a cable television station to expand to terrestrial broadcasting. The court found that AVMU's procedures were incomplete and failed to meet the standards for transparency and quality, confirming long-standing suspicions in the media sector that the regulator may not be acting fully independently and transparently.

Panelists agreed that those who want to establish media outlets face no obstacles, joking that may actually be the problem, considering the current overcrowded, unsustainable media ecosystem. Some panelists

commented that the established, traditional media and journalists seem to dispute the right of others to invest in new media or engage in providing information to the public. Saracini noted that it seems that traditional journalists, who once endured questioning over whether they deserved to be called journalists, now do the same thing to people behind "these new forms of expression."

The public service broadcaster, in general, meets its obligations to inform, educate, and entertain. It also tries to serve all members of society—and largely succeeds, despite frequent accusations of partisan reporting. Funding shortfalls, however,

impede the public broadcaster's performance, causing it to fail to meet the international standard of being sufficient, stable, and predictable. "They do meet their obligations to provide information, education, and entertainment for as diverse an audience as possible"—but budgetary constraints limit the quality of programming, calling into question the public service broadcaster's impact, Temenugova commented.

Furthermore, political horse-trading in the country's parliament resulted in two failed attempts to appoint new members of the public broadcaster's steering body, the Programming Council (as well as the audiovisual regulator's council), effectively preventing the start of much-needed reforms of the public broadcasting service.

The public service broadcaster remains under strong influence of the former government, the panelists added, primarily because managers and leaders appointed by the former government remain in office. The government, on the other hand, has made very political decisions to deny the public service broadcaster the full share of financing from the state budget prescribed by law—contributing to the prolonged crisis in the public broadcasting service.

The audiovisual regulatory council displays more independence from political meddling, especially from the government—explained, perhaps, because the previous parliament appointed the current members back

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in 2014 (they have continued in office in a “caretaker” role for almost two years now, until new councils are appointed). However, the panelists commented that in such a politicized country, it is difficult to fully eliminate political considerations in any area, and media regulation is no exception.

Indicator 10: Information channels are independent.

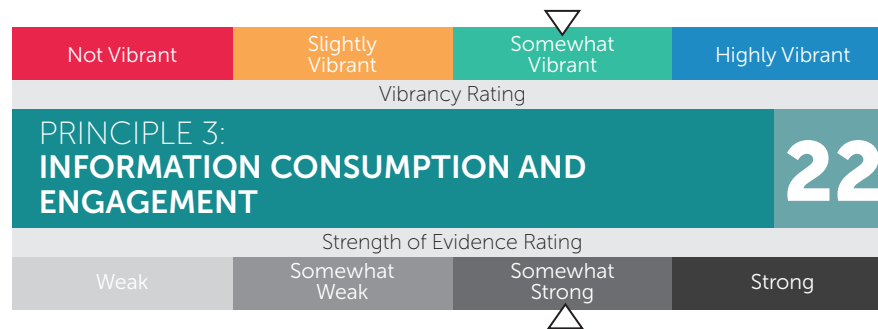
The independence of information channels remains an issue of great concern, as evident from the low scores the panelists gave this indicator. The notion that owners exert huge influence on the editorial policies of the media has been a mainstay of past VIBE reports. Panelists noted that most owners do not enter the media sector with the aim to inform, educate, or entertain, but rather to use the media as a bargaining chip in efforts to secure lucrative government contracts for their other businesses and as an instrument to fight competition. Some panelists noted that this issue is not unique to North Macedonia.

“There is no such thing as independence from the owners. That is a global trend, and there is no escaping it,” said Loparski.

On the surface, major advertisers do not attempt to influence editorial policies and decisions. However, the panelists commented that concerns over the potential loss of advertising revenue remain very real. “You rarely, if ever, see negative reports or serious investigations of operations of major advertisers,” Rashidi said.

Furthermore, it is difficult to draw a clear line of division between ownership, management, and newsrooms—particularly in the online sphere. The vast majority of online newspapers are small operations, with just two to three people, and everyone is expected to do a little bit of everything. “Consider my case. I am the owner, the general manager, the editor, the marketing person, and the lead reporter. All at the same time,” Nikolic commented. The situation is better in the traditional media, although in at least one national television broadcaster, one person holds the position of general manager and editor-in-chief, erasing the traditional division between business and newsroom operations.

The panelists could not identify any obstacles or barriers, apart from financial capacity, that prevent the media from procuring equipment needed for reporting.



North Macedonia’s citizens have at their disposal all the necessary tools to protect themselves on the internet, but insufficient levels of digital and media literacy, combined with low purchasing power, sometimes prevent people from taking full advantage of these resources. Nevertheless, the abundance of available media, as a whole, provide them with all the information they may, or may not, want to consume and engage with. Indicator 15, on community media, received Principle 3’s highest average score of 25, while Indicator 12, on media literacy, received the lowest average score of 17.

Indicator 11: People can safely use the internet due to privacy protections and security tools.

North Macedonia has aligned its legislation with the European General Data Protection Regulation (GDPR) standards in the area of protection of privacy. It is difficult to speak of the actual implementation, because there are not enough cases yet to draw any conclusions. For instance, all entities in the country are now legally obligated to have published a privacy policy that includes sections on use of cookies. Some panelists expressed reservations but also noted the positive efforts by data protection authorities to promote knowledge and awareness in the general public.

Panelists could not point to any particular cases involving use of privacy protection rules to silence reporters or to deny access to information in 2022, although a precedent of such cases exists from earlier years, and people of interest to the media often raise privacy concerns.

The media and citizens alike have access to quality digital safety instruments, but uptake depends primarily on finances. “As journalists, we often have trainings on protection and safety on the internet, and we are aware of the challenges. Adequate protection also requires resources that need to be provided by the media companies, and they don’t invest in protective measures,” said Meri Jordanovska-Cancarevic, editor at Vistinomer fact-checking services. Other panelists expressed doubts, too. “I don’t think our colleagues are aware or informed to a sufficient degree. There are not enough trainings in that area for media professionals. I am equally skeptical about the levels of skills in the general population,” said Momirovski, while other panelists complained about the lack of adequate information in all local languages.

The panelists noted a perceived generational gap, with older citizens possessing lower digital literacy skills than the younger generations that grew up in the digital era. That holds true in terms of knowledge of social network algorithms, targeted advertising practices, etc. The panelists did not think, however, that many young people are sufficiently concerned about those issues to actually change their media consumption habits. In their view, it is a matter of mentality, not a lack of awareness.

Some panelists believed that the state could take a much more active role. “Institutions need to offer more information in digital format, to digitalize more and more of their services. Investment in digitalization of services will automatically raise the digital literacy, by necessity,” said Bojan Kordalov, an independent communications expert.

Indicator 12: People have the necessary skills and tools to be media literate.

Panelists generally agree that media literacy levels are low, citing [international reports](#) from organizations such as the Open Society Institute’s Bulgaria office that routinely place North Macedonia in last

place among European countries in terms of media literacy skills. Some, however, offered dissenting opinions. “Surveys conducted in the country show that, contrary to accepted wisdom, media literacy of the citizens is high. However, everybody is focused on the surveys conducted by the Sofia-based Open Society Institute, and we find the methodology they use lacking in so many areas. The methodology of self-evaluation, used by the audiovisual regulator, is much better suited, although we need other research so we can compare the findings and make more consistent conclusions,” said Temenugova.

The need to improve media literacy has gained urgency in North Macedonia—along with much of the world—as a key tool to fight misinformation and the rise of populism.

The government has been paying lip service to the importance of media literacy for years, but actual efforts to introduce media literacy curricula at all levels of education—primary, secondary, and higher—started in earnest only with the launch of the USAID-funded YouThink project, implemented by IREX in cooperation with educational institutions in North Macedonia. The first results started to show in September 2022, with media literacy’s inclusion in elementary school curricula for select grades.

Panelists praised AVMU’s engagement in the area of media literacy, both in terms of promotion and in the gathering and analysis of data. Some noted the important role the media and journalists can play in media literacy efforts, too. “The media will contribute, through their work, by helping people recognize quality reporting. Education is important, of course, but if the media fail to do their share of the job, it is all in vain. People need to see how quality products should look,” Selmani said.

Several CSOs, following the lead of the major donors operating in the country, have been working to provide media and information literacy training for different segments of the population, but older generations have been somewhat left behind. Some panelists have pointed out the difficulty of changing long-held views, especially among older generations. Differences in information and media literacy levels also exist among people with different levels of education, according to

panelists. “What is especially disturbing is that even people with higher education are prone to believing disinformation and false facts,” Saracini commented.

Indicator 13: People engage productively with the information that is available to them.

Some panelists—while expressing discontent that large swaths of the public follow nontraditional, online media or get their information from social networks—said they were not sure that people are in the dark about the quality of the information they may consume. Some panelists pointed out that issues such as “confirmation bias” play a role in decisions related to consumption of media and information. “People in general like to read reporting that fits with their own views. We forget how many diverse groups of people live in the country. In communication, you have to take into consideration all types of people,” said Kordalov.

Freedom of speech and freedom of information are protected and guaranteed by the country’s constitution. Some of the existing restrictions to the freedom of speech—regarding hate speech, for instance—are inadequate, and the existing legislation should be amended, the panelists felt, to better regulate such matters and address a reluctance by the relevant authorities to prosecute people who engage in prohibited speech, especially hate speech.

Judging from surveys, such as IRI North Macedonia’s national poll, on media consumption habits of North Macedonian citizens, a majority manage to access quality information daily. Seventy-one percent of survey respondents indicated that television remains their main source of information, supporting the view that traditional broadcast media can be relied upon for quality and factual information, as opposed to the majority of online sites.

Citizens also have various public debate platforms at their disposal,

although the relevant institutions often circumvent town-hall meetings and public consultations on new legislation, the panelists noted. For example, too many pieces of legislation are pushed through the parliament in a shortened, urgent procedure, without proper public discussion, under the guise of the so-called European flag legislation (referring to laws that need to be aligned with the corresponding EU legislation).

As noted earlier, the need to cut costs pushed many television stations to adopt formats traditionally found on radio, as a form of “daytime television.” As a result, almost all television stations have call-in shows that discuss current affairs. CSOs also organize debates and panel discussions on issues of interest to their constituencies, often in cooperation with government institutions, especially on matters of public policy—debates that are inclusive and diverse, the panelists agreed. They praised the hosts of the call-in programs for their vigilance in calling out unacceptable speech on their platforms.

Panelists also pointed out that citizens, especially members of the activist community and representatives of different CSOs, are quick to report instances of unacceptable speech, especially hate speech. They did reiterate that the relevant authorities are slow to act or fail to take legal action on perceived hate speech and other forms of prohibited expression, although they admit that the authorities are obligated to apply a much higher standard to what may be admissible for legal action. Other than the prosecuting authorities, other institutions, such as the ombudsman, have only limited scope to act against hate speech.

Indicator 14: Media and information producers engage with their audience’s needs.

Only a handful of traditional media in North Macedonia invest in proper audience research to gather information about their respective audiences’ needs. Only the five national terrestrial television

“The need to improve media literacy has gained urgency in North Macedonia—along with much of the world—as a key tool to fight misinformation and the rise of populism.”

broadcasters are part of the joint industry committee that measures the reach and share of audiences and thus have access to some quality data. Online media all nominally use some instrument to measure statistics, such as Google Analytics, but panelists reiterated concerns from past VIBE and its predecessor Media Sustainability Index reports that many outlets do not have the knowledge and skills to properly interpret and apply the data to improve their services.

Public trust and confidence in the media and journalists continue to dip.

Readers' editors or newsroom ombudsmen are virtually unknown in the media in North Macedonia, although efforts have been made in the past to install such positions in some media outlets. Communication with readers and viewers is a responsibility divided among all members of the newsroom. Television broadcasters are in a somewhat better position, panelists noted, as audiences have been known to make comments on their offerings in the call-in shows now running on most television stations. Only a handful of media outlets have "letters to the editor" departments. Social networks serve as the main communication channel for most media. Formal complaints can be made solely through the self-regulatory body or in private correspondence with the editors, of which the public is rarely aware.

The situation may be better with the local media, which seem to communicate much more with their audiences and are more responsive to initiatives coming from the citizens. "Just this morning, I was trying to contact the national railways company, because people from my town were complaining about the fact that it terminated a train that was the sole means of public transport for several villages in the area. So, we try to listen for local problems in our area and report them," said Nikolic.

Public trust and confidence in the media and journalists continue to dip. The 2022 [International Republican Institute survey](#) shows that both trust and mistrust in media hover at 49 percent, and the media are not taking active steps to build that trust. The panelists noted that the practice of many online media to not publish masthead information, keeping the audience unaware of the owners and editors, further undermines trust. "The media have the instruments to interact with their audiences but

don't use them properly. Therefore, mutual trust has eroded. They don't take into consideration the information received from the public. There are exceptions of course, but they are far from becoming the rule," said Saracini.

The panelists are equally dissatisfied with the cooperation between the government, the media, and civil society. The blame, they say, rests primarily with the government. "There is no cooperation,

and I blame the institutions, because they are not open enough and they avoid any criticism. Our government institutions don't recognize the existence of problems. They only recognize and boast about the solutions of the problem—the existence of which they previously refused to recognize," said Kordalov.

Indicator 15: Community media provide information relevant for community engagement.

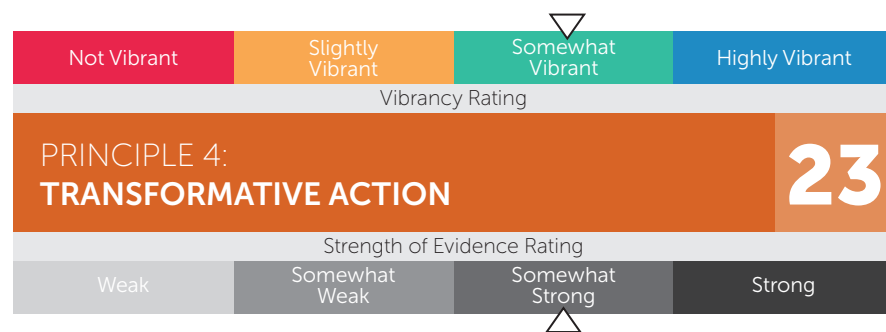
Formally, there are four nonprofit/community radio stations in North Macedonia. Three serve student populations in Skopje, Bitola, and Stip, while the fourth is dedicated to the Catholic community in the country's southeast region. These stations, featuring a completely different legal structure than the public or commercial radio stations, are expected to serve their constituent communities. The panelists agreed that the whole concept of community media is largely underestimated and underused in the country. "There are too few community media in the country to make a valid assessment. They remain small, and their reach and impact remain insignificant. Mainstream media continue to dominate here," Temenugova said.

Local commercial radio is expected, to some extent, to fill in at least one role of community radio—to provide local information. That is especially true of the radio stations that broadcast in minority languages.

Various marginalized groups and communities in Macedonian society have found out that the Internet provides a cheap and readily accessible platform and have established community media of their own—such

as RadioMOF, a youth-oriented online radio and news site, and several human rights organization websites, especially those that work with LBGTQ+ communities. The latest addition to the list is Radio ESI, an online radio outlet for blind and visually impaired people that was established in June 2020 with little evident promotion or fanfare. Social networks, especially various Facebook groups established around specific topics or locations, have also taken over the role of community media for various groups of people. They tend to be heavily issue-driven; for example, there are many such groups for a variety of environmental protection issues, such as air pollution alerts.

Such media outlets tend to survive on donor grants and commonly employ professional staff. Local donations, unless they come from the corporate world, are not all that common. Some are volunteer supported, but according to the panelists, the concept of volunteering never established deep roots in Macedonian society. Panelists noted that, due to their very nature and typically strong relationships with CSOs, they never engage in hate speech or other forms of unacceptable or prohibited expression.



The sheer number of active media, on all platforms and formats, ensures that the citizens of North Macedonia engage with a lot of information representing diverse political, ideological, cultural, and other value systems. Growing polarization, however, raises concerns about the actual preparedness of the citizens to engage with the information in a constructive manner, for the benefit of the whole society. The panelists raised concerns about the reaction, or lack thereof, of the authorities to

reports of corruption, abuses, and human rights violations.

Indicator 18, on civil society’s use of quality information, received Principle 4’s highest average score of 29, while Indicator 17, on individuals’ use of quality information to inform their actions, received the principle’s lowest average score of 19.

Indicator 16: Information producers and distribution channels enable or encourage information sharing across ideological lines.

Nonpartisan news and information sources exist. A majority of traditional media, especially in broadcasting, are at least nominally non-partisan—with some exceptions—and follow centrist, liberal, pro-western, middle-of-the-road editorial policies, according to the panelists, and they have huge audiences, especially television broadcasters. Partisan, ideologically strict (along the whole spectrum of left-right division), nationalist, populist reporting is found primarily in the online domain.

Several panelists pointed out that, although “news avoidance” in a growing trend in the country, a significant number of news consumers seek out several sources of news, of all formats and orientation, on a daily basis in order to get a clearer picture of issues of interest.

The media offer opportunities to exchange ideas across political or ideological lines, most commonly in the form of call-in talk shows. However, the panelists noted a lack of higher-quality content offering both discussion and proper analysis, as well as sufficient human resources dedicated solely to producing such material.

Citizens readily engage in exchange of information and opinions with people they disagree with, judging by the very loyal audiences of popular call-in shows. Several panelists pointed out, though, that typically the same 20–30 people with opinions and positions on seemingly every issue call in repeatedly.

Another issue the panelists pointed out is that most people do not go into discussion or debate ready to have their opinions and positions

changed but are in “full attack mode,” caring only about presenting their own argument. That seems to be the preferred model of communication online and on social networks, with the added element that rules of common decency quickly deteriorate in no-holds-barred shouting matches.

In the current climate of confirmation bias and echo chambers, people care little about basing their perspectives or views on facts or quality information, the panelists concluded. It would be more precise to say that people tend to have a set of facts that they already believe, and it is very difficult to change minds. “People want to read and hear things that fit in with the views they already hold, and the media provide them with what they want,” Kordalov said.

Indicator 17: Individuals use quality information to inform their actions.

Family traditions, peer pressure and influence, current trends and fads, and generational gaps may be far more influential than the quality of information in forming citizens’ opinions, positions, and actions. As an example, panelists pointed to global sources of content and information, such as social media, exerting a major influence, especially on the younger generation. “My daughter, in spite of the fact that both her parents are very much interested in news and information, has no interest in what is going on here. The media here don’t offer content that would attract the youth, attract her attention. She knows much more and is much more interested in Black Lives Matter (BLM) than in national politics,” said Nazim Rashidi, of TV 21.

The same issue applies to citizens’ voting habits, according to the panelists. As they point out, the main political parties enjoy very loyal constituencies who will vote for their respective party regardless of what the media report. Such voters are likely to disregard any negative media reports regarding the side they support as “media lies.” Given the low levels of trust in most state and government institutions (local

administration, notably, fares much better in that regard), citizens interact with them reluctantly.

The type of information people consume also hugely influences their choices and actions in the area of health care or general safety. The COVID-19 pandemic revealed a strong anti-vaccination presence in North Macedonia, the panelists mentioned, which affected citizens’ decisions

on whether to vaccinate themselves against the COVID-19 virus. The situation repeats itself, some panelists pointed out, with other conditions. “Look at the HPV vaccine. The huge influence of the anti-vaccine movement has resulted in dropping numbers of girls who get the HPV virus.

Now the fear of the vaccine is prevalent, as opposed to past times, when the fear of the disease was far greater,” Dafcheva commented.

The panelists also noted the cases of several prominent medical doctors—professors at Skopje’s University Hospital “Mother Theresa”—who issued public appeals after filing actual charges to the law-enforcement authorities failed. They wanted the relevant authorities to do something about abuse of their names and titles by peddlers of various “miracle cures” for all ailments and diseases and various dietary supplements. That type of abuse of media and advertising rules is quite common; as several panelists pointed out, the notorious youth from Veles who helped Donald Trump win the 2016 U.S. presidential election cut their teeth in manipulating social-network algorithms on health and nutrition websites.

A similar situation is found in other areas, such as environmental protection. No amount of reporting, public education, or public information campaigns on air pollution or overdevelopment and over-construction in the country, especially in Skopje, has resulted in any behavior changes. The motive to make a quick profit seems to trump the public good or public interest every time, whether it relates to overdevelopment of the city center or the need to limit the use of personal automobiles and use public transportation.

“In many cases, CSOs spark the interest of media and journalists in issues or stories that need to be covered.”

Indicator 18: Civil society uses quality information to improve communities.

Most of the panelists agree that civil society—whether formally organized in NGOs and CSOs, or as issue-oriented activist communities or groups—provides a bright spot for the country’s information system. In their view, CSOs always use quality information, based on proper research and analysis, when promoting their mission, or to promote the rights and interests of their constituents. Similarly, when promoting new policies or initiating a change in existing public policies, CSOs use quality information, usually augmented with proper comparative analysis of similar policies and solutions applied in other countries, especially EU member-states or countries from the immediate region of the Western Balkans.

Some panelists, though, offered dissenting opinions. “Of course, like all other interest-based groups, the NGOs also approach information and facts selectively, adding a spin that favors their constituents. But they don’t lie,” said Madzowski. Panelists also noted efforts by various NGOs to manipulate findings of public opinion surveys to suit their needs and goals.

However, the panelists also praised the role CSOs play in the fight against misinformation, pointing out that the country’s few fact-checking and debunking operations are NGO initiatives. Several panelists again expressed regret over the fact that mainstream media do little to join such efforts, both in terms of establishing fact-checking operations of their own or providing greater visibility to the civil society sector’s efforts.

The media have long recognized CSOs as a source of quality information, routinely inviting civil society representatives as commentators and pundits on their current-affairs talk shows. CSOs are also usually very skilled in using new media, especially social media and networks, as a channel for communication with their constituencies and the general public.

In many cases, CSOs spark the interest of media and journalists in issues

or stories that need to be covered. Several panelists noted that the few specialized investigative reporting outlets active in North Macedonia are all registered as NGOs to secure access to foreign donors’ grants program, aware that advertising revenue is out of their reach as an income source. For similar reasons, a number of other newsrooms, not necessarily specialized in investigative or other specialist reporting, operate as NGOs.

Indicator 19: Government uses quality information to make public policy decisions.

The panelists agreed that government’s mechanisms to engage and inform the public are, if anything, too robust. That is the case for most political actors, parties, and politicians, who engage large armies of public relations experts and spokespeople on the front lines of daily political struggle. The panelists repeated the complaint that public relations departments of both national and local government agencies now produce their own video and photo reports that they distribute to the media, in an obvious effort to ensure that their story will be told.

Much of the political discussion has been reduced to press conferences organized by a political party, followed by counter press conferences to rebut the claims of the opponents and launch counterclaims and accusations of wrongdoings. Each side of the given altercation then invokes evidence and facts that support their own claims, disregarding the arguments and the claims of the other side. Both sides routinely dismiss the claims of the other side as “fake news” and misinformation, and their positions are then adopted by the already polarized audiences. Some panelists feel that the government rarely relies on the use of false information or misinformation, instead putting the blame on the opposition (possibly due to past experiences when the current opposition held power).

The media have adapted to that approach, panelists noticed, and much of the news broadcasts—and indeed the political talk shows that dominate the prime-time slots of major television broadcasters—

“Panelists feel that all public and political debate has been reduced to a prolonged shouting match.”

follow the same pattern of mutual accusations and counteraccusations displayed by the government and the opposition. In general, the panelists feel that all public and political debate has been reduced to a prolonged shouting match.

Indicator 20: Information supports good governance and democratic rights.

The extent to which reporting of corruption, human rights violations, or electoral shenanigans helps to prevent their reoccurrence is questionable. All relevant global reports and ratings—such as [Transparency International’s Corruption Perception Index in 2022](#), along with EU progress reports—point to corruption as the main evil holding the country back for years, and reports dealing with respect for human rights, freedom of the press, or democratic freedoms in general give the country low marks for the state of human rights. The panelists noted, however, growing interest from the international community in tackling corruption in North Macedonia, which may lead to improvements in that area.

Panelists pointed out that the government provides two types of reactions to reports of corruption. The first is to pledge immediate, serious investigation and sanctions for those responsible. The second is to stand in defense of those accused and maintain their innocence until proven guilty. More often than not, the two approaches are applied simultaneously.

Panelists complained that it is rare for reported corruption cases to end in courts, with proper judicial ruling one way or another but said it is certainly not because the media under-reported or ignored the cases. “There is a general absence of proper institutional reaction, even in cases when we have quality media coverage of abuses or criminal actions. I would point out the examples of IRL’s (the Investigative Reporting Lab) reporting on the ‘Zhan Mitrev’ Clinic¹ during the COVID-19 pandemic

¹ IRL’s story, titled “Impure Blood,” investigated the clinic’s actions and behavior during the COVID-19 pandemic, and it accused the clinic and its eponymous owner and chief surgeon of misleading patients and providing expensive procedures that were untested and not officially approved for the treatment of COVID-19.

or the reporting of people who illegally passed the bar exam without completing the proper degree programs first,” Temenugova said.

It is a similar story with reports of violations of human or civil rights, which receive similar pledges of immediate and thorough investigation and sanctions for those responsible. Again, panelists noted, impunity seems to be a serious problem; they noted that the status of the journalism profession and the treatment of cases involving threats to journalists illustrates the situation well.

The panelists did offer some positive examples. “Remember the case of little Ambla and the ostracism and discrimination she faced in her elementary schools. The reporting of the case actually led to positive changes and greater acceptance for persons with impaired development in society,” said Madzowski, referring to an effort by parents in his own town to expel a child with Down syndrome from the local elementary school under allegations that “she was disturbing and aggressive toward other children.”

Doubts and complaints about election results emerge after every election—local and national—despite extensive reporting of alleged wrongdoing. The panelists pointed out that it may have more to do with the unwillingness of losing candidates to admit defeat than actual improprieties taking place—especially in such a polarized society, with the well-established “winner takes all” approach of election participants. As noted earlier, for most people, no amount of quality reporting or information will succeed in changing their opinions or choices at the ballot box.

Some panelists underscored the responsibility of the media in this respect. “Whether it is corruption, human rights, or elections, the media’s attention is rarely consistent. We tend to be interested in one topic for a day or two and then move to another issue, another affair, usually at the behest of the government and the political parties. And then we are surprised that voter turnout drops with every election,” Selmani said.

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The following people submitted questionnaires and were interviewed one-on-one:

Meri Jordanovska-Cancarevic, editor and journalist, Metamorphosis Foundation, Skopje

Katerina Dafcheva, journalist, TV VIS, Strumica

Suzana Nikolic, editor-in-chief/owner, Kumanovonews.com online newspaper, Kumanovo

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