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IN THE WESTERN BALKANS AND TURKEY

NATIONAL DATA OVERVIEW:
NORTH MACEDONIA

SUSTAINABILITY OF PROFESSIONAL JOURNALISM IN THE MEDIA BUSINESS ENVIRONMENT OF THE WESTERN BALKANS

This report is based on the Study that has been carried out by a team of researchers including:

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This research reflects the economic position and needs of independent media outlets in 2018 and 2019, with the majority of market data pertaining to 2018 and research being finalised in November 2019. The report does not cover the dramatic changes occurring in 2020, when the economic consequences of the COVID-19 pandemic dealt yet another blow to media businesses and further diminished the prospects for sustainability of independent media in the Western Balkans.

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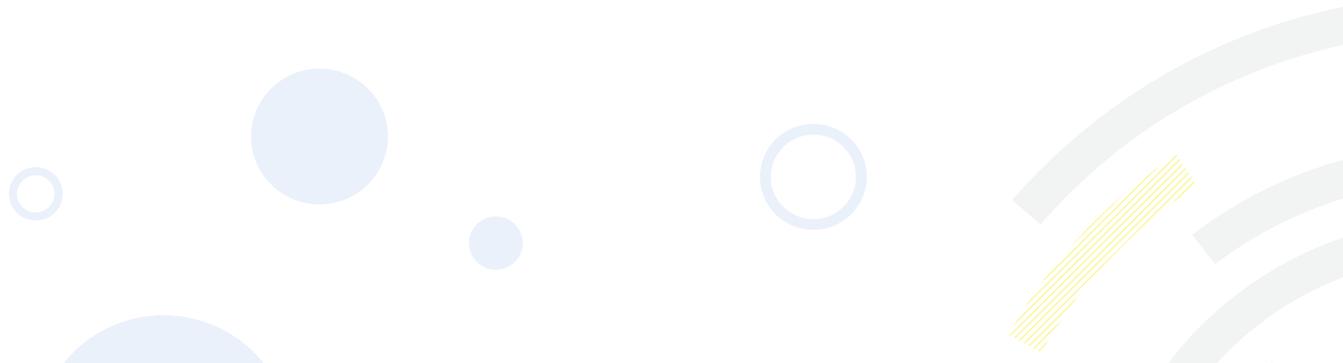
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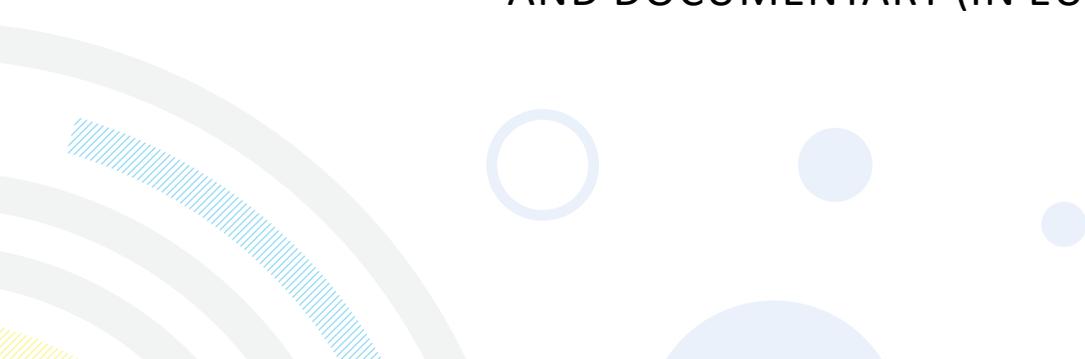


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1. MEDIA ECONOMY/ BUSINESS ENVIRONMENT



1.1. Media landscape

In 2019 there were more than 200 media outlets, traditional and online, in the media market of North Macedonia, which is small in both size and in financial scale. According to the regulator, the Agency for Audio and Audiovisual Media Services (AVMU), in addition to the public service broadcaster (PSB) Macedonian Radio and Television (MRT), in 2019, there were 121 commercial broadcasters (49 TV channels and 72 radio stations),¹ six daily newspapers, four weeklies, 16 other periodicals² and around 80 internet news media.³

With so many media outlets, the media market is considered highly fragmented and too small to allow these outlets to achieve financial sustainability. On the other hand, the fact that there is a large number of broadcasters does not mean that media pluralism is ensured, since commercial TV channels do not provide the public with alternative sources of information, a variety of programme offers and formats, nor distribution via a variety of platforms.⁴

Table MKD 1. Number of media per type (2019)

Media type	Number	Details
PSB Macedonian Radio and Television (MRT)	5 TV channels 3 radio channels	TV First Programme Service in Macedonian language Second Programme Service for communities in other minority languages Parliamentary channel 2 satellite channels
Commercial TV channels	49	12 national (5 via multiplex, 5 via cable and 2 via satellite) 18 regional 19 local
Commercial radio stations	72	4 national 17 regional (1 not-for-profit) 51 local (3 not-for-profit)
Print media	26 6 daily newspapers 4 weeklies 16 periodical magazines	Dailies: Sloboden pečat, Nezavisen*, Nova Makedonija, Večer, Koha, and Lajm Weeklies: the biggest two are Fokus and Kapital
Internet media	80 internet news media	

Source: Agency for Audio and Audiovisual Media Services; MSI North Macedonia, IREX, 2019.

* Closed in November 2019.

Although the media market remains overcrowded, in 2018 “it experienced some movement towards reduction. A number of broadcast media, specifically those broadcasting at local and regional levels, ceased operations.”⁵ In 2018 and early 2019, eleven broadcasters ceased work-

1 AVMU Registry, <https://avmu.mk/radiodifuzeri-mk/>.

2 AVMU Registry, <https://avmu.mk/pechateni-mediumi/>.

3 IREX, Media Sustainability Index (MSI), 2019: 76.

4 Macedonian Institute for Media, The role of Structural Pluralism in the Macedonian, Croatian and Montenegrin TV Sector, 2018: 15.

5 IREX, 2019: 77.



ing, including eight local/regional TV channels.⁶ On the other hand, new media outlets, both traditional and online, were also launched since 2014, a few of them successfully managing to survive in the market.

Due to the constant search for a model of financial sustainability to support the editorial and managerial independence of the PSB, the Law on Audio and Audiovisual Media Services was changed and the broadcasting fee abolished in September 2017.⁷ It was decided that the PSB would be financed through the State Budget. In December 2018, the Parliament enacted changes to the Law on Audio and Audiovisual Media Services, according to which the members of MRT's Programming Council in the future will be selected through a public recruitment process, following public discussion in the Parliament. The public call was announced in January, and the whole procedure should have been completed by May 2019. In June 2019, however, the process was blocked in the parliamentary committee for appointments and elections, and as of November 2019 the procedure remained frozen. The delay was partly due to presidential elections in April/May. Media and journalists' organisations recently appealed for the process to be unblocked, warning:

“Any further interference or delay of the procedure will seriously affect the implementation of the media reform process in the country. The long-awaited systemic reforms in the media sphere, which should enable the media to function independently and professionally, depend [sic] on the selection of the members in these bodies.”⁸

There are important differences between the financial position of media outlets with national scale and coverage (including broadcasters) and the position of local and regional outlets, whose markets are much more financially strained. Local and regional media outlets lack human and technical resources, as well as professional skills, which is reflected in the quality of the media content they produce. Advertisers favour national outlets, especially the large national broadcasters, putting “smaller media in an unequal position, in spite of their importance for their local, urban, or rural communities”.⁹

The print industry is in decline since the publishing company Media Print Macedonia closed in 2017 due to financial difficulties and managerial wrongdoing. That meant the closure of the three biggest dailies, Dnevnik, Utrinski vesnik, and Vest, as well as other periodicals that were published by the same company, all of them being part of a dozen print media outlets that have ceased publishing in the past decade. Nezavisen was the latest to close, in November 2019.

6 AVMU 2018, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>. p.5.

7 AVMU 2017, https://avmu.mk/wp-content/uploads/2017/05/Zakon-za-audio-i-audiovizuelni-mediumski-uslugi-_izmena-od-20.09.2017.pdf.

8 Macedonian Institute for Media, <https://mim.org.mk/en/news/1150-media-and-journalists-organizations-demand-unblocking-of-media-reforms>.

9 IREX, 2019: 85.



Table MKD 2. Publications that have shut down

Media outlet	Type of media	Year of shutdown	Reasons for shut down	Details/Comment
Dnevnik	Print daily	June 2017	Poor financial situation of Grafički Centar, owner of Media Print Macedonia (MPM), the publisher of Dnevnik, Utrinski vesnik and Vest.	Independent Union of Journalists and Media Workers filed a suit against owners Srgjan Kerim and Jana Stanisavljeva for intentionally decreasing the property of the legal entity, with the intention of closing the newspaper. ¹⁰
Utrinski	Print daily	April 2017		
Vest	Print daily	2017		
Tea Moderna	Print weekly	April 2017		
Shpic	Print daily	July 2011	The management of Plus Produkcija, which published the newspapers Shpic, Vreme, and Koha e re, went bankrupt.	Velija Ramkovski was sentenced to 13 years in jail for tax evasion, after which all of his companies, including Vreme, Shpic, and Koha e re, were closed.
Vreme	Print daily	July 2011		
Koha e re	Print daily	July 2011		
Republika ¹¹	Print weekly	July 2017	The company publishing the weekly failed to provide enough funding for normal operations. ¹²	
Forum plus	Print bi-weekly	August 2011		
Gragjanski	Print monthly	February 2013	Financial difficulties. ¹³	
TV A1	TV	August 2011	Agency for Electronic Communications withdrew the frequency of TV A1 because of bankruptcy proceedings. ¹⁴	
TV Nova	TV	August 2018	The Agency for Audio and Audiovisual Media Services withdrew the frequency of TV Nova because of bankruptcy proceedings. ¹⁵	
TV Orbis	TV regional	November 2018	The Agency for Audio and Audiovisual Media Services withdrew the frequency because of violation of the law on Audio and Audiovisual Media Services, and bankruptcy proceedings. ¹⁶	
Telekanal A1	TV regional	April 2018	The Agency for Audio and Audiovisual Media Services withdrew the frequency of A1, citing violation of the law on Audio and Audiovisual Media Services. ¹⁷	
Radio Slobodna Makedonija	Radio nationwide	May 2018	The Agency for Audio and Audiovisual Media Services withdrew the allocated frequency ¹⁸	The radio did not meet the criteria for minimum employees.
Nezavisen vesnik	Print daily	November 2019		

10 Prizma, <https://prizma.mk/zgasna-dnevnik-prviot-privaten-vesnik-vo-makedonija/> and Prizma, <https://prizma.mk/utrinski-vesnik-vest-izlegoa-za-posleden-pat>.

11 Republika, <https://republika.mk/nedelnik/>.

12 Daily Macedonia, <https://daily.mk/names/martin-desovski>.

13 Daily Macedonia, <https://daily.mk/vesti/zgasnuva-nedelnikot-gragjanski-5>.

14 Daily Macedonia, <https://daily.mk/vesti/zgasna-a1-televizija-1>.

15 AVMU 2017, <https://avmu.mk/wp-content/uploads/2017/05/Odluka-za-odzemanje-dozvola-za-televizisko-emituvanje-na-TV-NOVA-Skopje.pdf>.

16 AVMU 2018, <https://avmu.mk/wp-content/uploads/2018/11/Odluka-za-odzemanje-dozvola-TV-Orbis.pdf>.

17 AVMU 2017, <https://avmu.mk/wp-content/uploads/2017/05/Odluka-za-odzemanje-na-dozvolata-na-TV-KANAL-1-Strumica-29.03.2018.pdf>.

18 AVMU 2018, <https://avmu.mk/wp-content/uploads/2018/05/Odluka-za-odzemaње-na-dozvolata-za-radio-emituvanje-na-TRD-RADIO-SLOBODNA-MAKEDONIJA-DOOEL-Skopje.pdf>.



The five dailies operating in the market (excluding Nezavisen, which closed in November 2019) had a combined total circulation of between 36.000 and 38.000 printed copies [see Table 14] in the summer of 2019. Published since 1995, Fokus is the most popular and influential weekly, keeping a neutral and critical stance towards all governments. A few regional/local weeklies which have been publishing for years are struggling for survival.

The online media business has been on the rise in recent years. There are between 80 and 100 internet media that offer news content. Online media have been developing over the past several years, and there are around 40 media fighting for a bigger share of advertising budgets.¹⁹ An increasingly problematic issue for online media is the spread of disinformation, lack of respect for copyright, and failure to publish information on the persons responsible for the content of a media outlet (“impressum”).

In 2018, national radio broadcaster Radio Slobodna Makedonija was closed for not meeting obligations imposed by the regulator. In mid-2019, there were three commercial radio stations broadcasting nationally – Kanal 77, Antena 5, and Metropolis radio. Kanal 77 broadcasts news content, while the other two have predominantly entertainment and music content. By the end of the year, Radio Jon – a new Albanian-language radio – started broadcasting.

1.2. Media ownership

Media ownership in North Macedonia formally meets the legal requirements, but there are still suspicions of hidden ownership and speculations about close relationships between owners of the biggest media and certain groups in the political and business establishment. The 2017 Monitoring Media Pluralism found a medium risk (56%) for political independence of the media, but the report stressed that:

“...the country is still struggling to cut the clientelistic ties between political actors and the media [...] and to find appropriate solutions to safeguard political pluralism while ensuring sustainability of private media on the highly fragmented media market.”²⁰

Ownership of national commercial TV channels in Macedonia is predominantly concentrated in the hands of domestic legal entities and individuals, according to the regulator’s registries. None of the commercial terrestrial TV channels operating at the national level in Macedonia is owned by a media company which has media as a core business.

In practice there are still concerns of hidden ownership and links between media and political and business groups, especially concerning the biggest TV stations – TV Sitel and TV Kanal 5. This persisted even after they were required by the regulator, in 2012, to align their ownership

¹⁹ Analitika, <https://analitika.mk/2019/04/30/biznisot-so-internet-portali-tezi-okolu-tri-milioni-evra/>.

²⁰ Trepevska and Micevski, 2018: 4.



with stipulations of the Law on Broadcasting (2005, Art. 11). Although the legal requirements were formally met, this did not lead to independence of the TV channels from political influence. Both TV channels provided uncritical and favourable reporting on the government and the ruling parties until the change of the government in 2016. Afterwards, both TV channels moderated their manner of reporting, avoiding blatant bias in favour of political centres of power.

In 2019 the Agency for Audio and Audiovisual Media Services investigated 1 TV, as having the strongest indication of hidden media ownership. The TV channel was launched in March 2018 and started broadcasting nationwide via cable. In July 2019, a scandal broke out involving the management of the TV station, the Special Public Prosecutor, high officials of the ruling party, and several businessmen. The son of the co-owner of BMJ media group, which owns 1 TV, Bojan Jovanovski (who also claimed to be the owner of 1 TV), was detained on suspicion of having extorted €1.5 million from a prominent businessman in exchange for his favourable treatment in the investigation by the Special Prosecution Office. The TV station ceased its operations in autumn 2019.

In the print sector, the situation with ownership of the major media outlets is clear and transparent, since most of them are obliged to register with the Agency for Audio and Audiovisual Media Services. In 2018, the regulator's Report on Media Ownership pointed to the fact that Nova Makedonija daily and Kapital magazine are both owned by one company, Repro One Limited, which, however, does not represent a violation of the regulation on ownership.²¹

Online media is the segment of the media industry where there are the biggest ambiguities in ownership structure. Online media are not covered by regulation, but there are a dozen serious news portals that publish data on ownership, thereby demonstrating their credibility and professionalism (Plusinfo.mk, SDK.mk, MKD.mk, Makfax.mk, A1on.mk, Novatv.mk, etc). Over the past decade, however, tax havens have become the registered address for publishers of a dozen media outlets, mainly online media. One of them was the company Prva Republika DOOEL, which published the weekly Republika and the internet portal Republika.mk. The company was established in 2012 and initially was registered in Belize. The Adinamik company (whose owners are Hungarian citizens) later bought 51% of the shares.²² The Republika web portal is among several media outlets involved in Hungarian investments in media in North Macedonia. Two former senior executives of Hungarian Public television network Magyar Televizio (MTV), Peter Schatz and Agnes Adamik, set up companies in North Macedonia. Ownership of commercial terrestrial TV station TV Alfa, which broadcasts nationally, leads to Peter Schatz.²³ Agnes Adamik established the company Adinamik Media, in 2017, and bought shares in three media publishers in North Macedonia: Prva Republika (which publishes the news web-

21 AVMU 2017, <https://avmu.mk/wp-content/uploads/2017/06/ИЗВЕШТАЈ-ЗА-МЕДИУМСКАТА-СОПСТВЕНОСТ.pdf>. p.36.

22 Media Pedia, <http://mediapedia.tamijov.webfactional.com/mediumi/republika>; Istraživačka Reporterska Laboratorija Makedonija, <https://irl.mk/mediumite-na-ungarskata-desnitsa-se-pr/>.

23 TV Alfa is 100% owned by Alfa SKOP DOO Skopje. The owners of Alfa SKOP are Makoshped (17%), Tehnometal Vardar (15%), Evropa (11%), and CHS Invest Group (57%). The latter company is majority owned (90%) by Target Media, while Goran Balac from Serbia owns 10%. In turn, Target Media is owned by Peter Schatz from Hungary and was established in April 2017. AVMU 2017, <https://avmu.mk/wp-content/uploads/2017/06/ИЗВЕШТАЈ-ЗА-МЕДИУМСКАТА-СОПСТВЕНОСТ.pdf>. p.9, and OCCRP, <https://www.occrp.org/en/spooksandspin/right-wing-hungarian-media-moves-into-the-balkans>.



site Republika Online and published a weekly magazine, Republika, closed in 2017); majority shares in EM Media (which publishes the online news sites Kurir.mk, Lider.mk, Denesen.mk, Ekonomski.mk, and Vistina.mk); and a majority share in LD Press Media (which runs the website NetPress.mk). Adamik and Schatz are reported by investigative media as investors closely tied with the Hungarian Prime Minister Viktor Orbán, and indirectly with his political partners in Macedonia, i.e., the party VMRO-DPMNE.²⁴

Another case of foreign ownership in media is TV 24 Vesti, a national satellite broadcaster, whose owner is the company Cable 24 Linz, Austria (100%). The owner of this company is JM Data Ltd. in Linz, Austria.²⁵

Table MKD 3. Ownership of major media per type (with audience reach)

Type of media	Media outlet	Audience/ Circulation	Owner(s) and their ownership shares
Print ²⁶	Sloboden pečat daily	12,000-13,000 printed copies	Aleksandar Rodić, Belgrade, Serbia (50%), and Miroslav Jovanović, Skopje (50%)
	Independent Balkan News Agency (IBNA) <i>Note: Nezavisen daily ceased publishing in November 2019</i>	7,000 printed copies	Spiridon Sideris, Athens, Greece (95%), and Nikolaos Fragopulos (5%)
	Koha daily	5,000 printed copies	Lirim Dulovi (60%) and Arben Ratkoceri (40%)
	Fokus (weekly magazine)	8,400 printed copies	Jadranka Kostova (100%) ²⁷
	Kapital (weekly magazine)	3,000-4,000 printed copies	Ljupčo Zikov (6,09%) Društvo za proizvodstvo, trgovija i usluzi KAMBURIS I BARBA DOO export-import Skopje – 41,39% Repro One Limited AD Tortola, British Virgin Islands – 51% Gordana Stojanovska-Icevska, Skopje – 1,52%
Radio	RA Antena 5	Weekly reach 11.4% ²⁸	Zoran Petrov 33,3% Marjan Gushev 33,3% Kosta Janevski 33,3%
	Radio Kanal 77 (national level, informative format)	Weekly reach 6.2%	Društvo za trgovija, usluzi, marketing i informacii GBC KOMUNIKACII DOOEL, Stip (100%), which is owned by Viktor Gavrilov
	Macedonian radio 1 (PSB)	Weekly reach 1.5%	Public service broadcaster



24 Prizma, <https://prizma.mk/propagandnata-mashinerija-na-orban-vleze-vo-makedonija/>.

25 The company is owned by Jürgen Meixner from Austria. AVMU, <https://avmu.mk/wp-content/uploads/2017/06/ИЗВЕШТАЈ-ЗА-МЕДИУМСКАТА-СОПСТВЕНОСТ.pdf>, p.12.

26 The data about ownership of print media is taken from the media regulator’s Report on Media Ownership in 2018. Data about print circulation is published in the masthead of the newspapers.

27 The representatives of the magazine mentioned that there is a change in the ownership since 2019.

28 The data for the radio stations are obtained via IPSOS Nielsen TAM and IPSOS MediaPuls.



Type of media	Media outlet	Audience/ Circulation	Owner(s) and their ownership shares
TV channels	MTV 1	Share (SHR) – 2.70% ²⁹	Public service broadcaster
	TV Sitel (commercial terrestrial TV station on national level)	SHR – 24.12%	MONTEKO AD Skopje (100%), which is in ownership of Goran Ivanovski (100%) ³⁰
	TV Kanal 5 (commercial terrestrial TV channel on national level)	SHR – 12.80%	Emil Stojmenov (100%)
	TV Telma (commercial terrestrial TV station on national level)	SHR – 4.55%	Makpetrol AD Skopje company (100%). The company is in ownership of OILKO (22,87%) and Andreja Josifovski (14,98%)
	TV Alsat-M (commercial terrestrial TV channel on national level)	SHR – 5.07%	Ferik Velija (0,07%) Imihane Velija (0,07%) VEVE Group DOOEL Skopje (99,86%)
	TV Alfa (commercial terrestrial TV station on national level)	SHR – 2.54%	Alfa SKOP DOO Skopje (100%). Owners of the company are Makoshped (17%), Tehnometal Vardar (15%) and Evropa (11%) and CHS Invest Group (10% Goran Balac and 90% Target Media Skopje). Founder of Target Media is Peter Schatz from Hungary
	TV 24 Vesti (on national level via satellite)	SHR – 2.48%	Cable 24 Linz, Austria (100%). The owner of this company is JM Data GmbH, Linz, Austria, which is owned by Jürgen Meixner from Austria
Online media	Sdk.mk	16 th place among top-50 sites in the country	SDK Mihajlovski DOOEL company (owner Goran Mihajlovski)
	Plusinfo.mk	43 rd place among top 50 sites in NMK	Association of Citizens “Article 16” *Data from central registry
	Makfax.mk Online news agency (Klip Media Group: other portals: a1on.mk, grid.mk, reporter.mk)	N/A	Klip Media Group *Data from central registry

Source: Data from the Central Registry, and previous sources already footnoted.

29 The data about SHR% of the PSB MTV1 and commercial terrestrial TV stations are obtained via IPSOS Nielsen TAM and IPSOS MediaPuls.

30 Data about the ownership of the TV channels is taken from the regulator’s Report on Media Ownership for 2018, <https://avmu.mk/wp-content/uploads/2017/06/ИЗВЕШТАЈ-ЗА-МЕДИУМСКАТА-СОПСТВЕНОСТ.pdf>.



Table MKD 4. Main media owners and what they own

Owner/ ownership structures and holdings in media	Companies in non-media sectors
<p>Goran Ivanovski owns: - Monteko (100%). Monteko owns: - TRD Sitel (100%) TRD Sitel owns: - TRD Sitel 2 (100%)</p>	<p>Monteko DOOEL company (production of soft drinks and mineral water) MAGRONI DOO Skopje (soft drink production) Društvo za trgovija i usluga FG DOO (trade and services, wholesale trading in textiles) Pharmacy HERBAL MEDIKA, Skopje</p>
<p>Emil Stojmenov owns TV Kanal 5</p>	<p>Finansiski krediten centar BS DOO Skopje (monetary mediation) Tourist agency NET-BAJ DOO Skopje Finansisko društvo EURO MK DOO (monetary mediation)</p>
<p>Peter Schatz, founder and owner of: - Target Media DOOEL Skopje, advisory services (100%) (established 2017) Target Media owns: - 90% share in Macedonian holding company CHS Invest Group CHS Invest Group owns: - 57% share of ALFA SKOP DOO Alfa SKOP owns: - TV Alfa</p>	<p>No other businesses in North Macedonia</p>
<p>Abroad: - Co-owner and director of Website Repost, Hungary. - Repost is one of the three companies to buy into to Slovenia's NOVA24TV. - In 2017, Repost bought a majority stake in the publisher of Slovenian political magazine Demokracija and the tabloid Skandal24.</p>	
<p>Agnes Adamik founded Adinamik Media in North Macedonia. Adinamik Media bought: - majority share in Prva Republika, which publishes the news website Republika online (and published Republika weekly, until recently); - shares in EM Media, which publishes online news sites Kurir.mk, Lider.mk, Denesen.mk, Ekonomski.mk, Vistina.mk; - an unspecified shareholding in LD Press Media, owner of Netpress.mk.</p>	<p>No other businesses in North Macedonia</p>

Sources: Data from Central Registry; OCCRP.31

31 OCCRP article available at: <https://www.occrp.org/en/spooksandspin/right-wing-hungarian-media-moves-into-the-balkans> and <https://irl.mk/mediumite-na-ungarskata-desnitsa-se-pr/>.



1.3. Media funding

The media regulator’s annual Analysis of the Media Market for 2018 shows that the total revenues of PSB, commercial TV channels, and commercial radio stations amounted to €39.86 million, which is a decrease from the €42.4 million in 2017.³² The fall of advertising revenues has been reported by AVMU for years, mainly resulting from the discontinuation of government advertising since 2015, as well as from the reduced overall advertising spending due to the ongoing political turmoil. The overall advertising revenues of commercial TV channels amounted to €19.57 million, which is the lowest amount since 2014. The five major commercial terrestrial TV channels that broadcast on national level attract the majority of advertising spending. In 2018, their combined total revenues were around €17.3 million.

1.3.1. Advertising

Advertising is regulated by the Law on Audio and Audiovisual Media Services, which stipulates the terms and conditions for advertising in the media, duration, restrictions on advertising content, etc. In order to prevent state advertising, the law stipulates that state bodies, public companies, entities of local government, and public institutions should not make any budget available for advertising in commercial broadcasters (Article 102). However, municipalities continued to invest in advertising, with reportedly two thirds of municipalities spending around half a million euro for advertising in 2018.³³

All estimates indicate that the TV sector is attracting the biggest advertising share, followed by internet, radio, and print. The annual advertising spending in 2018 for all media segments (TV, radio, print, OOH, online) was estimated at €34 million, which was 3% higher than in 2017 (€33 million).³⁴

Table MKD 5. Advertising spending per media type, 2018 and 2017 (in million euro)

Media	2017	2018
TV	18.48	20.06
Print	2.97	1.70
OOH	5.61	5.44
Radio	1.98	2.04
Online	3.96	4.76
Total	€33 million	€34 million

Source: IPSOS, North Macedonia Media Landscape, 2018.

By contrast, the annual Analysis of the Audio and Audiovisual Market of the Agency for Audio and Audiovisual Media Services for 2018 shows that the advertising revenues in the broadcasting sector have been generally decreasing over the past five years, reaching their lowest level

32 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>, pp. 5-7.

33 Nebiu, B. et al., 2018.

34 Direct Media in IPSOS Analysis, North Macedonia Media Landscape 2018.



in 2018. The biggest portion of the revenues in the broadcasting industry came from advertising, and overall revenues amounted to €21.88 million.³⁵

Table MKD 6. Total revenues in the broadcast industry, 2014-2018

Year	Total revenues (in million euro)	Revenues from advertising (in million euro)	Advertising revenues (percent of total revenues)
2014	51.65	28.50	55.19%
2015	44	27.50	54.52%
2016	47.32	24.51	51.80%
2017	42.42	22.49	53.04%
2018	39.86	21.88	54.91%

Source: AVMU 2019.³⁶

In 2018, as was the case in previous years, the biggest share of advertising revenues went to commercial TV channels. The revenues generated from the sale of advertising time represented 92% of the total revenues of the five TV channels last year. The most-viewed TV channel, TV Sitel, made the biggest revenues from advertising (41%). “Other revenues” (exchange rate differences, interests, lease, etc.) represent the second largest source of income of the five commercial terrestrial TV stations, totalling €1.04 million, followed, finally, by sales of content, which represented an insignificant share of total revenues.³⁷

Table MKD 7. Share of advertising revenues of the terrestrial commercial TV channels

TV channel	Share of advertising revenues
TV Sitel	41%
TV Kanal 5	18%
TV Alsat-M	14%
TV Telma	12%
TV Alfa	12%

Source: AVMU 2019.³⁸

1.3.2. The role of government in media funding

From 2014-2018, the law required TV channels to fill a quota for domestic programming, and the state subsidised 50% of the production costs. A total of €1,351,735 over three years was allocated for this purpose. With the changes in the Law on Audio and Audiovisual Media Services, at the end of 2018, the production and broadcasting obligations – covering domestic film and documentary programmes – for national commercial TV channels and PSB MTV were

35 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>, pp.5-7. The IPSOS estimates are similar, with broadcasting revenues estimated at €22.1 million.

36 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>, p.8.

37 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>, p.19.

38 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>, p.19.



abolished. This model of state subsidies to media had several weaknesses, including lack of transparency. In practice, it resulted in the production of content of limited quality.

Table MKD 8. State subsidies to five commercial terrestrial TV channels and PSB MRT– support for domestic production of film and documentary (in euro)

Year	Allocation to 5 commercial terrestrial TV stations and MRT (total)	Allocation to MRT (Public Service Broadcasting)
2015	490,804	36,573
2016	488,815	N/A
2017	372,116	102,196
Total	1,351,735	138,769

Source: Reply from the Ministry of Information Society and Administration to the Macedonian Institute for Media (MIM) request for free access to public information, 28 August 2019.

The public service broadcaster MRT is predominantly funded directly from the state budget, and there are rising concerns about its sustainability.

Table MKD 9. Revenues of MRT allocated from the State Budget, 2017 and 2018 (in euro)

	2017	2018
MRT revenues	€16.8 million	€15.44 million

The circulation of all print publications has been decreasing dramatically over the past 10 years. These media outlets do not sell enough advertising space to be self-sustaining, while circulation sales are an insignificant source of income and cover prices have remained the same. Because of the difficulties faced by the print industry, in 2019 the government adopted a decision to provide subsidies in the amount of €692,000 from the state budget (out of a total budget of €810,000 allocated for this purpose) to 11 newspapers, which would cover costs of printing and distribution.³⁹

39 TV Telma, <https://telma.com.mk/vladata-ufarli-pari-vo-vesnitsite-isplateni-okolu-700-iljadi-evra-najmnogu-za-sloboden-pechat/>.



Table MKD 10. State subsidies to 11 newspapers (in euro)

Newspaper	Circulation	Subsidies
Sloboden pečat	12,000-13,000	232,160
Večer	7,900	117,968
Nova Makedonija	7,000	100,536
Koha	5,000	80,197
Fokus	8,400	75,194
Kapital	3,000-4,000	34,400
Lajm	4,000-5,000	16,974
Zaman	N/A (Zaman stopped publishing in print in April 2019 and continued publishing online only)	14,684 (returned the subsidies) ⁴⁰
Ekonomija i biznis	1,000	11,400
Zenit	2,400	4,672
Bitolski vesnik	2,100	3,975

Source: Newspapers' own printed circulation data.

Following the blatant misuse of state advertising in the period 2008-2015, the new government took a decision in September 2017 to stop the state advertising in commercial TV, print media, and PSB, with an exception for social media. Still, the Media Pluralism Monitor Report for 2017 stresses that:

“...several municipalities and public enterprises on local level continued allocating funds from their budgets to some of the local TV stations which were considered as politically close to the local politicians.”⁴¹

The government led by SDSM informed the public, at a news conference in 2017,⁴² that in the period between 2008 and 2015 the previous government spent €38 million in total for what could be called government advertising. That includes €23 million for advertising time in the broadcast media, €15 million for production of campaigns paid to several marketing agencies, and €200,000 for public opinion surveys. There were no clear criteria for the allocation of these funds.⁴³

40 MKD, <https://www.mkd.mk/makedonija/politika/vesnikot-zaman-se-otkazha-od-vladinite-subvencii-turskata-ambasada-gi-ob-vinuva>.

41 Trepevska and Micevski, 2018: 8.

42 The Government of North Macedonia, <https://vlada.mk/node/13464>.

43 Government of North Macedonia, <https://vlada.mk/node/13464>.



Table MKD 11. State advertising, 2008-2016 (in euro)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Campaigns, print media, ads	1,079,194	1,797,011	971,478	3,614,711	2,176,522	2,771,091	1,371,480	1,154,824	7,952
Survey/ Research	-	-	-	9,674	141,688	49,686	-	-	-
Media, TV stations	7,361,219	1,509,270	474,398	1,028,296	2,109,411	1,621,840	5,185,315	3,439,115	-
PR contracts	-	-	-	-	-	-	-	-	219,356
Total	8,440,413	3,306,282	1,445,876	4,652,682	4,427,622	4,442,618	6,556,796	4,593,939	227,309

Source: Document issued by the government at the request of MIM.

As an indirect measure of support for the media sector, there is a preferential value added tax rate of 5% on print editions, compared to the regular VAT rate of 18%.⁴⁴ The preferential value added tax is applied in relation to turnover and import of publications, including newspapers and periodicals.

1.3.3. Donor funding

The international donor community provides funds for media development in North Macedonia, focusing on enhancing professionalism and support to investigative journalism, supporting media associations, financing independent media in producing high-quality content, creating an enabling environment for media, etc. The largest funds from the international community in North Macedonia come from the Delegation of the European Union, USAID, the Swiss Agency for Development Cooperation (SDC), and the Foundation Open Society Macedonia (FOSM).

In the period 2008-2017, the Delegation of the European Union allocated around €3 million to different CSOs and media organisations under the Civil Society Facility and Media Programme, IPA, EIDHR, and Information and Communication Programmes.⁴⁵ FOSM supported over 60 projects in the period 2008-2018 totalling over €1 million.⁴⁶ Through the SDC's CIVICA Mobilias Programme, about half a million euro were allocated to media-related projects in the period 2015-2018. In 2012, USAID supported several media-related projects aiming to assist the independent media in North Macedonia, amounting to around US\$1.1 million.⁴⁷ The USAID- funded Balkan Media Assistance Programme in 2018 had two grant lines. The first

⁴⁴ Law on Value Added Tax, 2016, Art. 30, para 1, item 3.

⁴⁵ Data available on EU Delegation's website.

⁴⁶ The FOSM Annual Reports only provide overall figures for media and freedom of expression programmes and projects (ranging from around €300,000 to €600,000 annually) in 2011-2016; the amounts of grants for media organisations are not available. See: <https://fosm.mk/za-nas/izvestai-za-rabota/>.

⁴⁷ USAID, Fact sheets, <https://www.usaid.gov/km/news-information/fact-sheets?page=160>, p.161.



grant line “Technology Investment Grant (TIG)” was awarded exclusively to two key partners: “360 Degrees” (a production broadcast on TV Alsat-M) and the daily Sloboden pečat. Each partner received a grant of US\$25,000 and will receive another grant of the same amount in 2019/2020. The second grant line, “Engaging Content Grant”, supports the production of content, with each of six beneficiaries in 2018 (including key partners “360 Degrees” and Sloboden pečat) receiving up to US\$20,000.



Table MKD 12. Donor funding (main examples or data extracted/aggregated)

Donor	Title of media-support programme (duration of programme)	Recent grants, topic of grant	Implementer, budget
EU Delegation	IPA/2017/38961 - Civil Society Facility and Media Programme for the years 2014-2015 and 2016-2017	Topics: media literacy, critical thinking, media reforms, media production	23 CSOs received grants in the range of €19,990.00 to €372,898.52
USAID	Strengthening Independent Media in Macedonia 2012 -2015	Topics: Investigative Journalism and Cooperation between Media and Civil Society, Media Legal Reform and Responsible Media	3 CSOs received grants in the range of US\$198,089 to US\$488,268
FOSM	Citizen participation for social cohesion – 2018	Topics: Support of web portal, education of people with disabilities, development of social responsibility;	8 CSO organisations received grants in the range of €4,168 to €16,674
FOSM	Mobilisation of local organisations and activism in the community (2017)	Topics: publishing investigative stories that address issues of interest to local communities, Media monitoring 2017	6 journalists were awarded grants in the range of US\$7,970; and NGO Infocenter - US\$21.960
FOSM	Media programme 2008-2016	Topics: Media reforms observatory; free and open internet; hate speech, development of online media; various products (media monitoring, investigative stories, media production, etc.)	Grants to media outlets, journalists, and NGOs; Individual grants N/A, except for the period 2008-2010 when they ranged from several thousands to €50,000.
Civica Mobilitas	Ad-hoc grants 2016-2017	Topics: The prison - place where dignity can be lost most quickly; Media reporting on cases prosecuted by the Special Public Prosecutor's Office	Two CSOs were awarded grants in the amount of €6,505 and €29,356.18
Civica Mobilitas	Action grants 2015-2018	Topics: New media and communication, Encouraging citizens to actively participate in democratic reforms, Empowering local correspondents to form critical and constructive partnerships with local institutions; Reporting about CS and its impact on achieving societal changes	6 CSOs received grants in the range of €29,105.34 to €32,527.62
Civica Mobilitas	Institutional grants (2016-2018)	Five organisations	Range of €40,658.54 to €81,319.45
Civica Mobilitas	Small action grants (2016-2018)	The grants referred to the following topics: Promotion of future steps in media reforms, Photo Voltaic Technology - Solution for the Energy Future	4 CSOs received grants in the range of €4,444.90 to €6,505.52
Civica Mobilitas	Specific action grants (2017-2018)	Reporting about civil society and its impact in achieving societal changes	One organisation received a grant in the amount of €56,923.34



1.3.4. New alternative sources of media funding

One of the goals of the Regulatory Strategy for 2019-2023⁴⁸ is “enhancing the development of the market and competition, and especially the possibilities for new sources of revenues that are enabled by the digital environment”. However, an analysis shows that for the time being, “there are no viable initiatives of developing alternative sources of revenues in the media sectors.”⁴⁹

Interviewees in this research argued that new media initiatives need to follow and introduce innovations in order to increase their chances of survival. These include digital journalism, digital reporting, taking up new trends and forms of reporting and of investigative journalism. One of our interviewees also considers that the smaller initiatives dedicated to niche journalism which are not aimed at mass audiences have a more promising future in terms of sustainability.⁵⁰ Offering unique content, these media can potentially rely on funding from subscriptions or from cooperation with larger mainstream media that would carry their content. Some new business models have been tested, such as citizens’ support (for example by Investigative Reporting Lab – IRL). In order to raise its profile among potential audiences and attract citizens’ support, IRL organised a media stand (in one city) to introduce people to its mission and work. Interlocutors think that the conditions of the media market in North Macedonia are not favourable for introducing subscription or crowdfunding yet, but believe that the market in North Macedonia will change in a few years.

1.4. Consumer base/audiences

The IPSOS data shows that the reach of TV in 2018 was 1,305,432, while the reach of the internet was 1,425,681. Other media, such as radio, print dailies, and magazines had a low reach. Recent research by the Institute of Communication Studies showed that television is the dominant source of information for domestic news in North Macedonia (60%), followed by social media (27.3%), online media (5.7%), print media (2.1%), and radio (1.4%).⁵¹

Table MKD 13. Reach by media type, 2014-2018 (percent of total universe)

Media type	2014	2015	2016	2017	2018
TV	63.2	65.2	64.8	64.2	68.5
Radio	48.4	42.2	39.9	34.2	30.0
Daily print	10.4	6.9	5.9	3.2	2.0
Magazines	11.8	8.2	8.9	6.0	4.7
Internet	71.58	75.86	82.75	82.63	85.28

Source: IPSOS Nielsen team & MediaPuls.

48 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/03/Регулаторната-стратегија-за-периодот-од-2019-до-2023-година.pdf>.

49 Trpevska and Micevski, 2018: 7.

50 Aleksandar Manasiev from Vidi Vaka, interview, 23 June 2019.

51 Stop dezinformacii, <https://stopdezinformacii.mk/2018/09/26/od-kade-najcesto-se-informirate-za-slucuvanjata-vo-zemjata/>.



Table MKD 14. Daily newspapers and circulation, 2019

Dailies	Circulation
Sloboden pečat	12,000-13,000
Nezavisen*	7,000
Nova Makedonija	7,000
Večer	7,900
Koha	5,000
Lajm	4,000-5,000

Source: Newspapers' own printed circulation data.

* Closed in November 2019.

According to the Monitoring report of the “EU Guidelines for Media Freedom and Media Integrity 2014-2020” for 2017, 48% of the population mainly trust and 14% completely trust (a total of 62%) the media (newspapers, TV, radio, or online news sources) when it comes to reporting domestic news in a comprehensive, accurate, and fair manner. A total of 36% said that information about relevant issues, events, and developments is accessible through the media to citizens (23% saying “to a large degree” and 13% “completely”). A further 54% thought it was accessible to a lesser degree.⁵²

The 2019 MSI Analysis says that “figures on audience shares and ratings, circulation numbers of print media, and statistics for online media are considered inconsistent and unreliable”,⁵³ which is why media companies cannot rely on them in their business planning. In order to obtain a credible and trustworthy audience measurement, a Joint Industry Committee (JIC) was created under AVMU’s lead in 2017. It selected HGB Nielsen to conduct audience measurements. However, it is worth noting that the JIC includes only the national terrestrial broadcasters.

Panellists in the IREX MSI stated that the ratings or online statistics seemed to have little impact on the decisions of advertisers as to where to do their media buying.⁵⁴ According to the same study, the advertising industry favours the big national outlets, marginalising smaller media, especially those on the local and regional levels.

52 Monitoring report of the EU Guidelines for Media Freedom and Media Integrity 2017-2020 for 2017, p.8.

53 IREX, 2019: 85.

54 IREX, 2019: 85.



1.5. Competition, dominant position and its implications

Media concentration is not a major issue in North Macedonia. The Agency for Audio and Audiovisual Media Services closely monitors ownership and concentration issues. Broadcasters are obliged to inform the Agency, which must approve any changes in media ownership and prevent illegal media concentration. The Law on Audio and Audiovisual Media Services contains provisions for restrictions on ownership, transparency of information on ownership, etc. In practice, however, “false” or “hidden” ownership remains a burning issue, i.e., when one person is formally the owner, but there are indications that someone else is the real owner, thus circumventing the Law. Although it cooperates with the Central Registry, in practice the Agency does not have the means to uncover the real owners.⁵⁵

In 2018, the Agency initiated five investigations on suspicion of illegal media concentration. In four cases the procedure was stopped, since the broadcasters settled the problems after having received a warning from the Agency. In the fifth case, the national Network Kanal 77 Radio reported to the Agency that TV 24 Vesti (one of the media on our list of independent media) was allegedly connected with the cable operator ROBI DOOEL from Stip (Telekabel, one of the biggest cable operators in the country). The Agency initiated a legal procedure, requesting documents from the media outlet and cable operator, from the Public Revenue Office, and the Central Registry. On this basis the regulator ultimately determined that the owners were not the same.

Regarding media concentration, the regulator in its Strategy for 2019-2023⁵⁶ stresses a “real need for reassessing whether the current legislative provisions for determining the limitations for media ownership serve their purpose”. Research should be conducted to provide answers as to whether a relaxation of the existing limitations on ownership are needed,⁵⁷ since the provisions in the current law were taken from an older law from 2005, and since then many changes have taken place in the media market.

Regarding online media, our interviewees and many media professionals called for introducing the registration of portals, especially because many of them lack transparent ownership, do not publish information on the persons responsible for the content of a media outlet (“impresum”), and do not sign articles. This is important for the professional online media investing in professional newsrooms and expecting to compete in the market based on their original journalistic content.⁵⁸

The cable operators distribute foreign TV channels with subtitles and advertisements aimed at

55 AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/03/Регулаторната-стратегија-за-периодот-од-2019-до-2023-година.pdf>, p.37.

56 Ibid., p.35.

57 Ibid., p.37.

58 Interviews with three representatives of Fokus magazine, 24 July 2019.



audiences in North Macedonia, influencing ratings and revenues of domestic TV channels. This is particularly the case with the distribution of premium sports programmes (via major sport channels such as Arena Sport, Sport Klub, or Eurosport). In 2018, TV Telma filed a suit against cable operator One Vip, which had been re-broadcasting sports events (boxing matches) for which TV Telma had acquired broadcasting rights for North Macedonia.⁵⁹

Table MKD 15. Main holders of sports broadcasting rights

Sports events on TV channels with national coverage	TV channel
Grand Slam Tennis Tournament Wimbledon 2019	1TV
2019 Formula One World Championship	TV 24
2019 Handball World Cup	MTV 1 (PBS)
2018 FIFA World Cup Russia	MTV 1 (PBS)
Winter Olympics 2018	MTV 1 (PBS)
Boxing matches 2018 /2019	TV Telma
2018 Formula One World Championship	TV 24
Bundesliga 2018 (Football League in Germany)	TV 24

Source: Broadcasters' websites.

⁵⁹ Telma, <https://telma.com.mk/natsionalnite-televizii-vo-pravna-bitka-protiv-piraterijata-i-povreda-na-avtorski-prava/>. There was no progress in this case as of the beginning of 2020 (Source: Atanas Kirovski, director of TV Telma, phone conversation of 15 January 2020).



1.6. Media industry associations

The Macedonian Media Association, the Association for Print Media, and the Joint Industry Committee are examples of active media industry associations. They have initiated several policy changes, including subsidies to media and improvement of audience measurement.

Table MKD 16. Media industry associations

Association	Established	Details
Macedonian Media Association (MMA) gathering five commercial terrestrial TV stations	2014	Development of the media, professional standards in media work, improvement of working conditions of media, identifying problems in the legislation and pursuing changes; changes in the Law on Audio and Audiovisual Media Services, cable operators, competition, copyright, etc.
Association of Local and Regional TV stations “Media Objektif”	2017	In 2019, the Association advocated for the establishment of a mechanism for state subsidies to local and regional broadcasters (Fund for Media).
Association of Print Media	Restarted in 2018	Restarted in 2018 (established in early 2000, but in the last 10 years it was not active), when it opened negotiations with the government for introducing subsidies for print media. Subsidies were allocated to 11 print media in 2019.
Joint Industry Committee (JIC)	2017	JIC’s purpose is to provide the media industry with relevant, accurate, and precise TV audience measurement data. JIC was established and HGB Nielsen was selected to conduct audience measurements. JIC gathers 5 commercial terrestrial TV stations at national level.
The Association of Private Electronic Media of Macedonia	2012	Pursuing several initiatives regarding the audiovisual law; committed to defend and promote interests of its members.
Association for enhancing digital marketing Macedonia	2012	In 2018, the Association adopted a Self-regulatory Ethical Code of good professional practices in digital publishing. The Association’s activities concern the development of digital marketing. It published advertising standards, a tender for selection of official measurement of the digital media, etc. (https://www.iab.mk/education/).

There is no specific body that deals with advertising spending, advertising practices, state advertising, and audience measurement, nor is there a particular ethical code for advertising agencies. The larger marketing agencies, which are branch offices of international and Balkan-wide agencies, usually respect the standards and principles of these companies.

In the sphere of digital marketing, there is an Association for enhancing digital marketing – Macedonia, which includes web portals and marketing and PR agencies. The Association adopted a Self-regulatory Ethical Code of good professional practices in digital publishing in 2018. The purpose of the Code is to strengthen the digital market, also covering questions of advertising sales and commercial announcements.⁶⁰

⁶⁰ Interactive Advertising Bureau (IAB), <https://www.iab.mk/soopshtenie-za-javnost-iab-makedonija-usvoi-samoregulatoren-etichki-kodeks-na-onlajn-izdavachite-vo-makedonija/>



2. ECONOMIC SITUATION AND NEEDS OF INDEPENDENT MEDIA



Commercial TV channels in Macedonia, even some of the biggest national ones, do not have sufficient financial, production, and managerial capacities for content production. Almost all newsrooms in North Macedonia, be they in the largest commercial national TV stations or in regional, print, or online media, lack specialised human resources (journalists, camera operators, editors, etc.) and modern, up-to-date equipment in order to produce diverse, professional, and high-quality media content. This deficit is exacerbated by the development of new media and social platforms. Technology is changing fast, so also an investment in new equipment is always an issue without a satisfactory and immediate solution.

Besides improved funding that would enable media to address these needs, there is also a need for the government and regulatory authorities to create an enabling environment for the free and independent functioning of the media.

2.1. Who they are

This part of the overview is based on an examination of the economic situation of selected independent media outlets. Examples of such media are provided in the table below.

Table MKD 17. Selected independent media outlets

Media outlet	Main features
TV Telma -Commercial terrestrial TV station on national level -Private, for profit -Independent	<p><u>Transparent ownership:</u> The information is available in the analyses for 2018 by the media regulator.</p> <p><u>Professional, quality journalism:</u> Has been adhering to professional and ethical standards and has adopted a consistent media policy in recent years. It produces professional and quality journalism content. TV Telma adopted a neutral/critical reporting stance during the rule of the previous government.</p> <p><u>Valuable contribution to media pluralism:</u> Comprehensive, professional, and neutral approach in its informative programmes; journalists show initiative and journalistic engagement in initiating new topics. For ten years TV Telma has been running an investigative journalism programme (“KOD”) and a daily debate programme “Top tema na vaša strana” comprising a variety of voices from society.</p> <p><u>Respect for professional standards:</u> Employs credible and professional editors and journalists who abide by journalistic and ethical standards. Publishes contact information for its staff.</p>
Fokus magazine -Weekly magazine -National coverage -Private, for profit -Independent	<p><u>Transparent ownership:</u> Information is reported to the media regulator, which prepared and published an annual report about ownership in 2018.</p> <p><u>Professional, quality journalism:</u> Has the highest circulation in the market. It employs some editors with extensive professional experience, as well as investigative journalists. It publishes professional, credible and quality content, as well as in-depth investigative stories.</p> <p><u>Valuable contribution to media pluralism:</u> Publishes credible investigative stories, which is unusual among print media in North Macedonia.</p> <p><u>Respect for professional standards:</u> Respects professional and ethical standards. Its editors and journalists are members of AJM. It has received a number of journalistic awards from the Macedonian Institute for Media (MIM) and the Association of Journalists of Macedonia (AJM).</p>





Media outlet	Main features
<p>Nezavisen vesnik -Daily newspaper⁶¹ -National coverage -Private, for profit -Independent</p> <p><i>Note: Nezavisen was closed in November 2019.</i></p>	<p><u>Transparent ownership</u>: The information about ownership is reported in the media regulator’s 2018 report.</p> <p><u>Professional, quality journalism</u>: Publishes professional and quality content on daily basis (daily affairs, analyses, comments, different topics).</p> <p><u>Valuable contribution to media pluralism</u>: Publishes information on a variety of political camps and actors. On its website edition it has sections in Albanian and English as well.</p> <p><u>Respect for professional standards</u>: Respects professional and ethical standards in its investigative journalism. Its editors and journalists are members of AJM.</p>
<p>Prizma/BIRN -Online media -Non-profit -Independent</p>	<p><u>Transparent ownership</u>: Information about Prizma is published on the website.</p> <p><u>Professional, quality journalism</u>: Prizma provides news coverage only of certain major events and is mostly focused on in-depth reporting, exploring new angles to different stories and uncovering corruption and abuses of power.</p> <p><u>Valuable contribution to media pluralism</u>: Prizma is devoted to the production of investigative journalism stories. It provides audiences with unique quality content, offering more detailed elaboration compared to standard reporting (i.e., “narrative journalism”), profile interviews, weekly opinion pieces by established authors; its features and reportage stories cover various topics, from election coverage to cultural heritage.</p> <p><u>Respect for professional standards</u>: Produces content that is in line with the journalistic Code of Ethics and international standards of journalism. Its investigative stories have received many awards in contests organised by media and journalistic organisations.</p>
<p>Koha daily -Daily newspaper -National coverage -Private, for profit -Independent</p>	<p><u>Transparent ownership</u>: Information about ownership is reported to the media regulator, which published its annual report about media ownership in 2018.</p> <p><u>Professional, quality journalism</u>: Koha publishes professional and quality content (news, analyses, investigative stories) on a regular basis.</p> <p><u>Valuable contribution to media pluralism</u>: Published in the Albanian language, it is the longest-running outlet providing information for the Albanian-speaking public. It publishes information on the whole political spectrum and its actors.</p> <p><u>Respect for professional standards</u>: Adheres to professional and ethical standards. Has received a number of journalistic awards from MIM and AJM. Its editor was a member of the Programming Council of the PSB MTV, while its owner Lirim Dulovi is a representative in the Association of Printed Media. Koha is a member of the Council of Media Ethics of Macedonia and AJM.</p>
<p>Plusinfo.mk -News website -National coverage -Private, for profit -Independent</p>	<p><u>Transparent ownership</u>: Data about ownership and the publisher is available on the website Plusinfo.mk.</p> <p><u>Production of professional, quality journalism</u>: Publishes professional and quality content (news, analyses, comments). It is one of the most serious news portals in North Macedonia.</p> <p><u>Valuable contribution to media pluralism</u>: Reports on the whole political spectrum and its actors. Takes a critical position towards all political parties and governments.</p> <p><u>Respect for professional standards</u>: Respects professional and ethical standards.</p>

61 Information on the financial situation of individual newspapers is not publicly available. The annual advertising revenue in the print media sector is estimated at 2.8% of a total estimated €31.5 million (MSI IREX 2019).



Table MKD 18. Examples of new media initiatives

Media outlet	Main features
<p>Vidivaka.mk -Online platform -National coverage -Non-profit -Independent</p>	<p><u>Transparent ownership</u>: Information about Vidi Vaka (editor, journalists, cameraman, video editors, founders and producers) is published in the legal notice (“impressum”) section of the Vidi Vaka Facebook page.</p> <p><u>Professional, quality journalism</u>: Produces video content that can be adapted for use on different social media platforms.</p> <p><u>Valuable contribution to media pluralism</u>: Produces content in a format of short videos tailored to mobile devices and social networks, focusing on alternative aspects of stories of public interest.</p> <p><u>Respect for professional standards</u>: On the Facebook page of Vidi Vaka there is a section called “Editorial policy” containing the main principles of its professional work, values it adheres to, structure and the working practices of the team. The document was developed with support of external consultants from Slovakia and the United States.</p>
<p>Samoprasaj.mk -Interactive online platform -Non-profit, established by private research and educational institution -National coverage -Independent</p>	<p><u>Transparent ownership</u>: The information about establishment of the website is available at samoprasaj.mk.</p> <p><u>Professional, quality journalism</u>: Produces at least 5 journalism stories, articles, video material and analytical articles per week in different formats adjusted to different media platforms.</p> <p><u>Valuable contribution to media pluralism</u>: Samoprasaj.mk is a platform for exchange of ideas and opinions related to public policies. Citizens can ask questions and comment, as well as receive answers from CSOs and institutions. Samoprasaj.mk regularly reports on societal issues (except for day-to-day political stories): electoral reform, education, health issues, diversity and social cohesion, environment, economy, construction, judicial reforms and rule of law, youth issues, human rights and discrimination.</p> <p><u>Respect for professional standards</u>: Engages professional, experienced journalists for content production. There are editors who check and verify the content before publishing. The content follows the professional and ethical standards stipulated in the Code of journalists of Macedonia.</p>

2.2. The economic situation and needs of the selected examples of independent media

The number of employees per major independent TV station is around 100, and their annual revenues range from €1.4 million to €2.5 million per channel. The amounts are, in some cases, insufficient to cover operational costs. Some independent broadcasters operate with annual losses ranging from tens of thousands to hundreds of thousands of euros.⁶²

The number of employees per major independent print outlet is much lower compared to broadcasters – around a dozen people – and their revenues and expenses reach up to several thousand euros. The financial difficulties faced in particular by print media outlets, were the

⁶² AVMU 2019, <https://avmu.mk/wp-content/uploads/2019/07/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2018-година.docx.pdf>.



reasons for the recent shut-down of daily Nezavisen, published by Independent Balkan News Agency. The identified needs of the selected media and new initiatives are presented in the table below.

Table MKD 19. Needs of the selected examples of independent media and new initiatives

Media outlet	Needs	Details/Comment
TV Alsat M	<ol style="list-style-type: none"> 1. Staff 2. Staff training 3. Equipment 4. Own programming 5. Archiving 	<ol style="list-style-type: none"> 1. Economic constraints of the media market prevent development 2. Specific training tailored to the needs of TV 3. Technical equipment (cameras, cranes) 4. Production of domestic entertainment and economics programmes, strengthening existing brands, general improvement of content quality, etc. 5. Archiving material
Fokus magazine	<ol style="list-style-type: none"> 1. Staff 2. Support for investigative journalism 3. Support for the web platform 4. Direct support for the media <p><u>External:</u></p> <ol style="list-style-type: none"> 5. Problem with delayed remuneration for delivered services 6. Problems with financial discipline 	<ol style="list-style-type: none"> 1. Employing investigative journalists 2. Financial support for development of investigative journalism 3. Producing short videos and interviews for the web portal; further upgrading of the web portal 5. Magazine has a problem with collecting receivables, impacting on reinvestment 6. Companies do not pay for published advertising, while the media outlet still must pay a tax for it
Sdk.mk	<ol style="list-style-type: none"> 1. Support for digital newsroom 2. Support for production of journalism content 3. Training for journalists in new media and social media 4. Investment in latest professional tools for distribution of news on social networks 5. Staff with new media and social network skills 	<ol style="list-style-type: none"> 1. New generations of journalists with new media and social network skills
Investigative Reporting Laboratory (IRL)	<ol style="list-style-type: none"> 1. Staff (investigative editors, copy editors, journalists specialised in storytelling) 2. Equipment 3. Professional administration, marketing agent 4. Support in providing international expertise 5. Support for investigative journalism 6. Self-marketing – presentations outside Skopje <p><u>External:</u></p> <ol style="list-style-type: none"> 7. EU financing cross-border projects for investigative journalism, corruption, etc. 	<ol style="list-style-type: none"> 1. Trained and educated journalists, having a balanced proficiency in theory and practice 2. Production of video content, for development of web-portal, software, security 4. EU could provide support in administrative work 6. Developing a profitable financing model by 2021 that will provide one third of the finances (€80,000) from the public; continue working as a small team.
Vidivaka.mk	<ol style="list-style-type: none"> 1. Staff 2. Development of digital journalism and digital reporting 3. Assistance in writing applications (especially for EU funds) 3. Production of documentary series 4. Development of production available for TV in the country, regionally, and beyond 5. Investment in equipment, software, visualisation applications 6. Subscription 	<ol style="list-style-type: none"> 1. Development of a highly skilled team (Mainly by employing new staff with specific skills, but also by organising trainings for the existing staff) 6. It is early and not yet appropriate to introduce a subscription, but the market may change in the coming years.



2.3. Opportunities for growth (new approaches)

Table MKD 20. Initiatives and ideas for growth

Media outlet	Initiatives/ideas for growth	Details/Comment
Vidivaka.mk	<ol style="list-style-type: none"> 1. Digital journalism (digital reporting), which implies the adoption of some new trends and forms of reporting or investigative journalism 2. Niche journalism 3. Introducing a subscription scheme for 1,000-2,000 subscribers, as a pilot 4. Production of documentary series 5. Development of content suitable for broadcast on TV in the country, regionally, and beyond 	<ol style="list-style-type: none"> 1. Media who try to find some form of innovation, such as digital journalism, have the best chance of survival. 2. Smaller initiatives that are niche journalism and are not aimed at the mass market have better prospects for sustainability, since small media have an incentive to protect their independence. 3. Subscriptions can generate revenues to finance the production of high-quality videos.
Investigative Reporting Laboratory (IRL)	Development of a model that will enable IRL to obtain at least 30% of the resources through public support	The goal is not just fundraising, but awareness-raising: members of the public must understand that the demand for professional media must come from them.
Sdk.mk	Support for digital newsroom and non-profit journalism	Need for professional staff and digital equipment (software) that will facilitate operating a digital newsroom.
Alsat-M	Diversifying content and production of a variety of high-quality programmes on different topics	TV wants to increase original domestic production on different topics (economy, children, education, entertainment, documentary, debate, etc.).
Fokus magazine	Support for investigative journalism and an online platform	Production of text, video, and multimedia content for the online platform. Support for investigative journalism (journalists, training, etc.).



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LIST OF INTERVIEWS

Aleksandar Manasiev, editor of the online platform "Vidi vaka" (vidivaka.mk), North Macedonia, 23 June 2019.

Biljana Trošanovska, responsible for financial segment (Fokus magazine), North Macedonia, 24 June 2019.

Lirim Hajredini, Operations Director of TV Alsat-M, 24 June 2019.

Jadranka Kostova, Coordinator of the project (Fokus magazine), 24 June 2019.

Biljana Mladenova, responsible for marketing (Fokus magazine), 24 June 2019.

Sashka Cvetkovska, Journalist and editor in Investigative Reporting Lab (irl.mk), North Macedonia, 23 June 2019.

Atanas Kirovski, director of TV Telma, phone conversation, 15 January 2020.



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