



South East European Network
for Professionalization of Media

DEPRIVED MEDIA MARKET, LOW ETHICAL STANDARDS, NEED FOR EFFECTIVE LEGISLATION

The Future of the Media in North Macedonia – Facts and Trends

Vesna Nikodinoska

Tamara Chausidis

OUR MEDIA:

A civil society action to generate media literacy and activism,
counter polarisation and promote dialogue



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EXECUTIVE SUMMARY

This analysis presents the situation in the media field, the new trends, and the critical areas that can affect the development of the media sphere in North Macedonia as well as democracy. The poor media market, disinformation, ineffective regulation, and growing dependence of media on state funds are some of the key challenges that can hinder the development of the media industry in the country.

The economic potential of the market cannot ensure the development of the audiovisual sphere and long-term sustainability of media. However, increasing institutional mechanisms are making the media more and more financially dependent on the state budget and increase the possibility of media clientelism and political influences. Disinformation and disregard of ethical standards, especially in the digital environment, bring a need for fundamental basic regulation in this segment. Additionally, in terms of the broader socio-political framework, systemic corruption and non-transparency of institutions reduce trust in institutions, including the media.

As a result, the state shows a weak democratic capacity to effectively deal with the above-mentioned negative practices and lack of support for the development of the media sphere. These issues limit citizens' access to quality information and control over institutions.

The following conclusions can be drawn from the data analysis:

- The socio-economic status of journalists should be continuously advanced via improvement of working conditions in newsrooms and greater acknowledgement of labour rights on the part of media owners and the state.
- Rapid technological and information changes impose the need for adapting the ethical and professional standards to the new digital environment, as well as creating specific guidelines for the media and journalists in terms of the use of artificial intelligence.
- The interest of young people in studies in journalism, communications, and media is drastically decreasing due to the weak link between studies with the labour market, the poor economic situation in media, and the inherent risks to this profession. It is necessary to modernize the study programmes and curricula which should be in line with the newly emerging environment, as well as making it possible to interlink with the media industry.

- Disinformation and non-compliance with ethical standards are often evident in online media, thus there is already a wide discussion in the media community about the legal definition of the status and functioning of the online media.
- Ownership transparency in broadcast media is at a high level, which is not the case in internet media, as the latter are outside the legal scope. The legal solution for pluralism in media ownership does not correspond to the new digital environment, therefore changes are needed that will enable development of the media market and industry consolidation.
- Funds from the state budget for paid political advertising during elections and public interest campaigns have increased in recent years and represent a significant source of funding for many media outlets. The above increases media dependence on state funds, as well as the possibility of corruption and media clientelism.
- Professional media organizations and the civil sector support the idea of establishing a fund for the development of media pluralism, to serve as an independent mechanism for developing projects and contents of public interest. Such approach will encourage diversity, quality, and independence in the media industry.
- In the media landscape, there are not enough media and/or programmes that represent ethnic groups, marginalized groups, and persons with disabilities, while non-profit media is one of the most underdeveloped segments therein. Trust in institutions, including in the media, is very low, due to the high level of systemic corruption, disinformation, non-transparency, and weak effectiveness of institutions.
- Media literacy is included in formal education as a systemic approach to teaching, but awareness of its importance should be promoted more among all age groups and segments of society.
- Transparent and efficient policies, comprehensive analyses, and overarching strategies are needed to cover all segments of the media market, including the digital sphere. The limited media market adversely affects the economic situation of the media, resulting in a lack of evident development of pluralism, diversity, and independence of the media in the audiovisual media sphere.

I.

INTRODUCTION

This report examines the topic of the future of media in North Macedonia in terms of their sustainability and resistance to political, economic, and other influences. The goal is to determine the current situation in the media sphere and to identify new trends in media development. It should provide guidance on how media policies can encourage the media to serve the public interest and democracy.

Despite the favourable socio-political climate for media work, disinformation and the low professional level, especially online, reduce trust in the media (Reporters Without Borders, 2024). The process of harmonizing media legislation with European standards began in 2023 and aims at creating conditions for competitiveness and pluralism, upgrading the socio-economic status of journalists, and improving the legal framework for the public broadcast service. However, reinstating the financing of public campaigns with budget funds brings a potential risk of corruption and clientelism for the media. Although lawsuits and attacks on media have decreased, threats and pressure coming from politicians and public figures remain present.

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The analysis includes desk research and interviews with media professionals, in which data were collected on four indicators: the future of journalism, the future of media, the future of media use, and trust in media, as well as the future of democracy. Most of the data were collected from open-source data, thus out of a total of 230 questions in the database for North Macedonia, about 30 questions remained unanswered.

The research on future of the media was conducted simultaneously in all countries of the Western Balkans and in Turkey, aiming to identify and analyze the current state of play and emerging trends in media, journalism, and democracy. In the first part of the research, carried out between April and September 2024, a large set of data on journalism, media landscape, ownership and finances, media representation and participation, media use, media trust, and democracy was gathered and analyzed on the country level. The identified trends, risks, and opportunities will be further analyzed through interviews and focus groups with different stakeholders in the second part of the research in 2025, resulting in recommendations for safeguarding journalism, media, and democracy. The research is a part of the regional project "Our Media: A Civil

Society Action to Generate Media Literacy and Activism, Counter Polarization and Promote Dialogue”, implemented by nine media organizations from the Western Balkans, Turkey, and Slovenia in the period 2023–2026.

The factual data presented in the tables in this report are only the part of the extensive data collection presented in the separate data report, available at the web site of the Our media project.¹

1 Here is link to the Our media project web site: <https://seenpm.org/our-media-publications/>

II.

GENERAL COUNTRY DATA

North Macedonia has 1,836,713 inhabitants, of which young people (age 15–29) account for 18% of the population, which is above the European average. Compared to the 2002 Census, there has been a decrease in this age group of 6% which reflects the ongoing trend of emigration due to economic and educational reasons (Westminster Foundation for Democracy, 2021).

The literacy rate (95.8%) has been increasing since 1994 (State Statistics Office, 2021). Most citizens (45%) have completed secondary education, while about 20% have completed tertiary education. With high inflation rates and low living standards, the economy of North Macedonia noted slow economic growth in 2023 (World Bank Group, 2024). The gross domestic product (GDP) per capita has shown a slight increase in the past three years, while the average salary amounts to app. EUR 600, which is among the lowest salaries in the region. Still, compared to 2021, the GDP per capita has increased by EUR 130.

Table 1: **GENERAL COUNTRY DATA**

| | |
|--|---|
| Total population of the country in 2023 | Total population: 2,085,679 Residential population: 1,836,713 (Census 2021) |
| Population literacy rate in 2023 | 95.8% (Census 2021) |
| GDP per capita in the country in 2023 (based on purchasing power) | app. EUR 7,480 |
| Average salary in the country in 2023 | app. EUR 595 (MKD 36,614) |

Source: State Statistics Office (2021); World Bank Group (2024).

The country has limited economic capacities, resulting in growing migration trends, especially among young people. In this context, it is difficult for the media to attract and keep engaged prospective young professionals, which is also due to the salaries for this profession with amounts below the national average. However, the growing educational level of the population brings the potential for enhancing the critical public view of the institutions.

III.

THE FUTURE OF JOURNALISM

The overall environment remains favourable to press freedom, but disinformation and low professional standards undermine trust in media in North Macedonia. The attacks against journalists while performing their work and online are declining, but are still present (Reporters Without Borders, 2023). The unstable socio-economic status makes journalists vulnerable and susceptible to influences (Trpevska, 2024).

It is estimated that 1,000 to 1,200 journalists were employed in the media industry in 2023 and 2024 (AJM' estimations), half of whom were female journalists (Trpevska, 2024). The above trend has been present in the course of the past ten years.

One of the biggest issues related to the socio-economic status of journalists is short-term employment contracts in media (Trpevska, 2024), which is the usual practice in online media. About two-thirds (71%) of the journalists had permanent employment (full time), seven per cent were unemployed (hired on work contracts or temporary service contracts), while only 1% were freelancers (Trpevska, 2024). There has been a decrease in the number of employees in both local and regional media – in 2024 an average of 1.6 journalists were employed in the above. This sector is functioning in very difficult conditions, bringing many risks for journalists' status and labour rights (Trpevska, 2024).

The journalism profession has become less attractive for the young generations, thus in the past ten years, the interest of students in enrolling in media, journalism and communications studies has decreased drastically – from 220 students enrolled 10 years ago to about 30 students in 2023.² Apart from the weak interlink of journalism studies with the labour market, the work stress and the low salaries in the profession contribute to this decline.³

The journalism profession is poorly paid, as indicated by data showing that half of the employees (55%) received incomes lower than EUR 600 per month, which is the amount of the average salary in the country. At the same time,

One of the biggest issues related to the socio-economic status of journalists is short-term employment contracts in media, which is the usual practice in online media.

2 Data is provided by the faculties offering studies in journalism, media, and communications.

3 At the time of preparation of this report, the journalism studies at the University Ss. Cyril and Methodius are being modernized and a journalism laboratory was established.

the salaries of journalists in the public service were higher than those in the private media. Two thirds of the journalists who were employed in the public service media received income of EUR 490 to 650 per month, while about 40% of journalists employed by private TV broadcasters had a salary lower than EUR 490 (Trpevska, 2024).

Although the goal of the collective agreement for the media industry is to contribute to finding solutions of the majority of the issues of media workers, only two of the media with state shareholding capital – the Media Information Agency (MIA) and the Public Broadcasting Service Macedonian Radio Television (PBS MRT) – have acknowledged the abovementioned document. There are no collective agreements in the private media, in which, in certain instances, private media owners perceive union organizing as “a hostile activity”.

The professional associations, such as the Association of Journalists of Macedonia (AJM) and the Council of Media Ethics of Macedonia (CMEM), are very active in the media sector.⁴ They implement numerous activities for increasing professionalism and promotion of the profession, which are intended for all media workers at different levels of career development.

In principle, the ethical and professional standards contained in the Journalists’ Code of Ethics (2001) are applicable to all journalists at the national level. In 2021, the Guidelines for Ethical Reporting of Online Media were adopted, including provisions that address ethical dilemmas in online media work. Due to rapid technological and informational changes, media experts recommend making addenda to this document. The rise of artificial intelligence brings a need for additional and specific guidelines for the media and journalists in this area.

Due to rapid technological and informational changes, media experts recommend making addenda to the the Journalists’ Code of Ethics (2001) and the Guidelines for Ethical Reporting of Online Media (2021).

The awareness and acknowledgement of the existence of self-regulatory mechanisms is growing, which is indicated by the continuous increase in the number of complaints submitted to the Complaints Commission at the CMEM and the Council of Honour at AJM. Most of the complaints submitted in 2023 were related to violations of the articles of the Code of Ethics that refer to the publication of accurate, verified, and balanced information, distinguishing between facts and comments, and the right to correction or response to published information.⁵

Other frequent violations of ethical and professional standards in online media are related to not disclosing the impressum and author of contents, as well as

4 There is also the Association of Regional Media “Medium Objective” and the Association of Professional Online Media “Promedia”, but their activities are limited.

5 Articles 1, 3, and 13 relate to the publication of disinformation.

unsigned “copy-paste” texts (Council for Media Ethics in Macedonia, 2022). In order to improve the standards in their work, the professional online media established a Register (www.promedia.mk), which has around 120 members.

Attacks targeting journalists note a decline in the past three years (Association of Journalists of Macedonia, 2024), as well as the number of lawsuits. However, SLAPPs against journalists, although few in number, are on the rise. They serve as instruments of intimidation and putting pressure on independent media.

Access to public information and protection against surveillance are regulated in general laws that apply to all citizens, including journalists (Law on Free Access to Public Information, 2019; Criminal Code, 2023) while the protection of information sources is a legally and constitutionally guaranteed right.

Table 2: **DATA ON JOURNALISTS AND JOURNALISM**

| | |
|---|---|
| Overall number of journalists in 2023 | Est. 1,694 (56% female journalists) |
| TREND in the past 3 years: Is the overall number of journalists growing, declining, or remaining the same? | Remaining the same |
| Number of students of journalism (and communication and media studies) in 2023/2024 | 25 students |
| TREND in the past 3 years: Is the number of students of journalism growing, declining, or remaining the same? | Trend: Declining 2022/23 - 33 students 2021/22 - 35 students 2020/21 - 49 students |
| Average salary of journalists in 2023 | Between EUR 488-650 (MKD30-40,000 for 41% of surveyed journalists) |
| Number of attacks on journalists (and media) in the country in 2023 (including threats, intimidation, smear campaigns, physical attacks) | 2023 - 5 attacks |

| | |
|--|---|
| TREND in the past 3 years: Is the number of attacks on journalists growing, declining, or remaining the same? | Trend: Declining 2023 - 5 attacks 2022 - 7 attacks 2021 - 5 attacks 2020 - 14 attacks |
| TREND in the past 3 years: Is the number of complaints to the relevant national-level self-regulatory body growing, declining, or remaining the same? | Trend: Growing 2023 - 132 2022 - 78 2021 - 109 |

Sources: Trpevska (2024); Council of Media Ethics of Macedonia (2021-2023); Association of Journalists of Macedonia (2023); Faculties offering studies in journalism, communications, and media (2021-2023).

The data indicate the presence of serious challenges for the future of journalism considering the low salaries, lack of respect for basic labour rights, and poor working conditions in some media. The efforts of the professional associations to increase professionalization and enhancement of the ethical standards are significant. Still, there is a growing need to develop efficient policies for improving the professional and technological capacities of newsrooms, especially local and non-profit ones.

IV.

THE FUTURE OF MEDIA

The perspectives of media functioning in the country are endangered in several key areas: rapid growth of online media, lack of legal regulation and application of self-regulation in this segment; limited economic potential of the media market that does not encourage pluralism and fair competition; and growing dependence of media on state funds.

4.1. THE CONCEPT OF MEDIA

The legally defined concept of media includes television, radio, and print media, but not online media (Media Law, 2013, Art. 2). Despite ongoing discussions in the media industry about the need to update the definition in order to comply with digital trends, no changes have been made to date.⁶ A group of thirty influential online media established the association “Onlinemedia” which advocates for the inclusion of online media in the legal definition.⁷

The Law on Audio and Audiovisual Media Services (AAVMS) (2013) regulates only the broadcasting sector and partly print media, while online media are outside its scope. This regulatory gap creates inconsistencies: on the one hand, online media are treated as media in certain cases – for example, during political advertising and allocation of budget funds during elections,⁸ and on the other hand, they are not recognized as media entities in court cases.

6 The law was amended in 2014 and in 2024, however the definition remains unchanged (Law on Amendments to the Law on Media, 2014/2024); At the time of preparation of this report, the government submitted an initiative for amendments to the Law on Media, so that the definition of media should include online media – internet portals (Ministry of Digital Transformation, 2024).

7 Onlinemedia.mk. (2023). <https://onlinemedia.mk/>

8 Online media are mentioned under the term “electronic publications” or as “information transmitted through a computer system” in the Criminal Code (Art. 318, 319 and 417), as well as in the Civil Liability for Insult and Defamation Act (Art. 6, 8 and 18), the Law on Copyright and Related Rights (Articles 52 and 120), the Law on Protection of Personal Data, the Law on Free Access to Information of Public Character, the Law on Protection Against Discrimination, etc.

Table 3: **DATA ON CONCEPT OF MEDIA**

| | |
|--|-----|
| Is the definition of media established in national regulation? YES/NO | YES |
| Has the definition/concept of media and legal obligations arising from the legal definition of media been the subject of public debate and contesting arguments? YES/NO | YES |

Sources: Law on Media (2013); Law on Audio and Audiovisual Media Services (2013).

The current legal framework proved to be inefficient for solving the problems of online media, which are becoming an influential segment. Apart from the fact that they employ 20% of the journalists in the media industry, their readership is growing, as well as advertisers' interest. Keeping the above out of the legal definition would mean maintaining a "grey zone" for their functioning with regard to their professionalism, spread of disinformation, transparency of ownership, and financing.

4.2. MEDIA LANDSCAPE

The media landscape in North Macedonia is seeing a decline in the number of traditional media and a rapid growth of online platforms. There is no established entity in the country that has an insight into the existence of online media, which leads to confusion in terms of their total number, currently estimated at around 300.

In terms of broadcasting activity, there is a disproportionately large number of operating broadcasters compared to the size of the country and the financial power of the media market (Agency for Audio and Audiovisual Media Services, 2024). Still, the numbers are declining: in 2023, there were 100 broadcast media,⁹ 13 less than three years earlier (Agency for Audio and Audiovisual Media Services, 2021-2023; 2021-2023d). The most common reasons for permit revocation were financial difficulties: non-functioning of the broadcaster, non-payment of fees, or non-fulfilment of the terms and conditions for the minimum number of staff (Agency for Audio and Audiovisual Media Services, 2024a).

The rise of pluralism, diversity, and independence in the audiovisual media sphere are some of the strategic goals of the regulatory policy and the regulatory

The unfavourable economic situation of the broadcasters results in a lack of professional staff, diversity of the programme, and domestic production.

⁹ This figure includes the public service (Macedonian Radio and Macedonian Television), 98 commercial broadcasters (40 TV stations, 58 radio stations), and 23 printed publications.

authority, but the unfavourable economic situation of the broadcasters results in a lack of professional staff, diversity of the programme, and domestic production. The number of media that produce their own news programme is limited, especially in the case of radio channels.

At the same time, the number of online media is growing, which is evident in the register of the State Election Commission (State Election Commission, 2024), where 251 online media applied for paid political advertising for the 2024 elections, compared to 191 for coverage of the local elections in 2021 (State Election Commission, 2021). The number of members in the Register of Professional Online Media “Promedia” is also growing; there were 102 media registered in 2020 (Association of Journalists of Macedonia, 2020), while in 2024 this number increased to 126.¹⁰ It is difficult to estimate the number of professional online media that offer news content.

Table 4: **DATA ON THE MEDIA LANDSCAPE**

| | |
|---|---------------------------|
| Total number of media in the country in 2023 | App. 300 |
| TREND in the past 3 years: Is the number of media growing, declining, or remaining the same? | Declining |
| Total number of public service media in the country (national, local) in the country in 2023 | 1 |
| Total number of private, commercial media in the country in 2023 | 123 |
| Total number of private, non-profit media in the country in 2023 | >10 |
| Total number of daily newspapers in the country in 2023 | 4 |
| TREND in the past 3 years: Is the number of daily newspapers in the country growing, declining, or remaining the same? | Trend: Remaining the same |
| Total number of national TV channels with news content in the country in 2023 | 40 |

10 Promedia.mk. (2024). <https://promedia.mk/>.

| | |
|---|------------------|
| TREND in the past 3 years: Is the number of national TV channels with news content in the country growing, declining, or remaining the same? | Trend: Declining |
| Total number of online news media in the country in 2023 | App. 100 |
| TREND in the past 3 years: Is the number of online news media in the country growing, declining, or remaining the same? | Trend: Growing |

Sources: Agency for Audio and Audiovisual Media Services (2021-2023); State Election Commission (2024); Promedia.mk (2023-2024).

The non-profit media sector is underdeveloped with only four non-profit radio stations operating – three for the student population and one covering religious content (Agency for Audio and Audiovisual Media Services, 2024b). This sector also covers certain number of non-profit online media which are recognized as relevant and professional newsrooms.

The print media face the most challenges, both in terms of funding as well as readership. The existing four daily newspapers and one weekly newspaper have very low circulation.

The media landscape is undergoing a transition phase characterized by huge market fragmentation additionally amplified by the rise of online media. The consequences are seen in financial disturbances on the market and decline of the effective pluralism, related to scarce diversity and low-quality content (Research Institute on Social Development, 2023).

The media landscape is undergoing a transition phase characterized by huge market fragmentation additionally amplified by the rise of online media.

4.3. MEDIA OWNERSHIP

In the past three years no significant changes have been detected in the ownership structure of the country’s leading media. According to the regulator, in general, the transparency of data on ownership of broadcasting media in 2019 is at a high level (Agency for Audio and Audiovisual Media Services, 2024).

The regulation of media ownership is determined by the Law on AAVMS (Art. 37, 38, 39, 41 and 61) which is applicable only to broadcasters. As is the case with print media, they are obliged to report the ownership structure to the AAVMS, which then discloses such data publicly and regularly updates it. In contrast, ownership of online media is not regulated and limited data is available via corporate laws in case such media are registered as businesses.

Media experts indicate that the current legal framework related to protection of pluralism of media ownership is outdated and does not correspond to the new digital environment. The suggested changes refer to regulation of ownership concentration in order to enable development of the media market and to provide for industry consolidation (Furnémont and Trpevska, 2020).

Table 5: **DATA ON MEDIA OWNERSHIP**

| | |
|---|---|
| <p>Name the 3 biggest media owners in the country (owners of the biggest number of media and/or with the biggest audience reach and/or biggest share in the advertising market).</p> <p>Add information about the country of origin for each of the 3 biggest media owners.</p> | <p>Goran Ivanovski (North Macedonia), owner of TV SITEL Emil Stojmenov (North Macedonia), owner of KANAL 5 Velija family (North Macedonia), owner of TV ALSAT-M</p> |
| <p>TREND in the past 3 years: Has the list of the top 3 media owners in the country changed? YES/NO</p> | <p>NO</p> |
| <p>Is media ownership concentration regulated in the country? YES/NO</p> | <p>Partly</p> |
| <p>Is transparency of media ownership regulated by law? YES/NO</p> | <p>Partly</p> |
| <p>Is media ownership transparent in the country (credible information about who owns media is published)? YES/NO/PARTIALLY</p> | <p>Partly (only for broadcasters and print media, but not for online media)</p> |

Sources: Agency for Audio and Audiovisual Media Services (2021-2023); Pikasa Analytics (2023).

Although ownership of broadcasters is considered transparent, experts point to hidden ownership and ties to ruling elites in practice (Furnémont and Trpevska, 2020). Ownership transparency is most problematic in online media; there are concerns about the connections of entire groups of portals with political parties. These practices threaten the professionalism of journalism and create unfair market competition (Trpevska, Mitrevski and Micevski, 2020).

4.4. MEDIA FINANCING

The funding of media mainly comes from advertising, for which there is precise data only for broadcasters which yield an income of approximately EUR 20 million annually (Agency for Audio and Audiovisual Media Services, 2021-2023). In a highly fragmented market, just a small number of broadcasters generate significant revenues. The total advertising market, including online media, social media, and outdoor advertising is estimated at EUR 40 million and is approximately the same as in the past three years.¹¹ Although there is no transparent data, estimates indicate an increase in advertising in online media and a decline in advertising income in print media (Pikasa Analytics, 2021-2023).

The state subsidies are limited and mainly intended for printing and distribution of newspapers since they are in the most disadvantaged position.¹² In recent years, the amounts are constantly falling – from EUR 700,000 in 2018 to EUR 163,000 in 2023 (Trpkovski, 2023; Ministry of Finance, 2023).

Table 6: **DATA ON MEDIA FINANCING**

| | |
|--|--|
| Total value of the national advertising market (including all types of media) in 2023 in EUR | App. EUR 40 million |
| TREND in the past 3 years: Is the total value of the national advertising market growing, declining, or remaining the same? | Remaining approximately the same |
| Share of TV in the value of the national advertising market in 2023 | Share of TV in the broadcasters' advertising market is 88.3% |
| TREND in the past 3 years: Is the share of TV in the value of the national advertising market growing, declining or remaining the same? | Remaining the same |
| Total budget of the national public service broadcaster in 2023, in EUR | EUR 16,248,844 |

11 There are no precise data on the total advertising market including online, social media, and outdoor advertising. We refer to Pikasa Analytics estimates.

12 With the amendments to the Law on Media of 2024 subsidies became legally regulated. It is the same solution as previously, i.e. covering the costs of printing and distribution, while the government still has the last say on determining what amount will be set aside for funding; Law on Amendments to the Law on Media (2024), Art. 28 a, b, c.

| | |
|---|--|
| TREND in the past 3 years: Is the total budget of the public service broadcaster growing, declining, or remaining the same? | Trend: Declining 2023 - EUR 16,248,844 2022 - EUR 17,935,698 2021 - EUR 15,922,439 |
| Share of total budget of the national public service broadcaster in 2023 received from the state budget | 97% |
| Total amount of public funding (grants and subsidies) from the national government and local governments to media in the country in 2023 | EUR 240,000 (Subsidies for print media: EUR 163,000 and AAAMS subsidies for IRL: EUR 80,000) |
| TREND in the past 3 years: Is the total amount of public funding (grants and subsidies) to the media in the country growing, declining, or remaining the same? | Subsidies are declining. The amount for political advertising during elections is growing. |
| Are the obligations of public bodies, institutions, and companies to publish data on funding to media regulated by law? YES/NO/PARTLY | NO |
| Data on allocated amounts of public funding to media outlets are published. YES/NO/PARTLY | YES |
| Total amount of state advertising (advertising of state bodies, institutions, and state-owned companies) in the media in the country in 2023 | > EUR 10,600,000 (2024) |
| TREND in the past 3 years: Is the total amount of state advertising in the media in the country growing, declining, or remaining the same? | Trend: Growing |
| Total amount of international donor funding to the media in the country in 2023 | app. EUR 6.5 mill. in the period 2020-2024 for media development and journalism support programmes |
| TREND in the past 3 years: Is the total amount of international donor funding to the media in the country growing, declining, or remaining the same? | N/D |

Sources: Agency for Audio and Audiovisual Media Services (2021-2023); Ministry of Finance (2023); Apostolov (2024); Pikasa Analytics (2021-2023); Global Forum for Media Development (2024).

The most important form of funding support for the media is paid political advertising during elections and public campaigns (Law on Amendments to the Law on Audio and Audiovisual Media Services, 2024, Art. 101). For the past six years, political parties were allowed to allocate funds for political advertising during elections which were paid to the media from the state budget (Electoral Code, 2024). These funds have been increasing in each subsequent election cycle and reached EUR 10.6 million during the 2024 elections (Apostolov, 2024). The above model will be valid until January 2025, when the amendments to the Law on AAVMS will come into effect, according to which the state and local authorities will have the opportunity to conduct public awareness campaigns for which 0.1% of the budget will be allocated. Media organizations regard the above decision as a backwards step in ensuring media independence, considering the fact that in 2017 the government banned state advertising due to the possibility of abuse and media clientelism.

The most important form of funding support for the media is paid political advertising during elections and public campaigns.

The small economic potential of the market limits the capacity of media to enable financial stability and independence. The increase in public financing funds compromises media, jeopardizing their critical and “watchdog” role over institutions in a democratic society. A few of the investigative media are mainly financed by foreign donations, which does not guarantee sustainability in the long run.

4.5. MEDIA REPRESENTATION

Due to the overall economic situation in the media, there is a lack of staff and professional and production capacities in newsrooms. This affects representation in media in terms of gender equality, minority communities, and existence of local and regional media. In these areas, there is a medium risk of deterioration of the situation which may negatively impact pluralism and diversity in society (Micevski and Trpevska, 2024). The marginalized groups (women, LGBTQ, persons with disabilities, and ethnic minorities) are not represented enough, while accessibility to the media of persons with disabilities is assessed as high risk (Micevski and Trpevska, 2024).

Half of the total number of journalists in North Macedonia are women (Trpevska, 2024). However, they are rarely holding editorial and managerial positions, except in print media and non-profit media. On the other hand, the share of journalists from ethnic communities’ is 22% to 28% of the total journalist population, of which the greatest share comprises Albanian journalists (17%) (Trpevska, 2024), while the other minorities are represented with 1% to 3%. Thus, for example, the representation of ethnic minorities in

governing bodies in the five leading television channels is about 20%.¹³ The percentage of national TV channels owned by individuals of Albanian ethnicity is the same (Agency for Audio and Audiovisual Media Services, 2021-2023b). Across all media sectors, two prominent media outlets are owned by foreign citizens – TV Alfa and Sloboden Pecat.

Table 7: **DATA ON MEDIA REPRESENTATION**

| | |
|---|---------|
| Share of female journalists in the country in 2023 | 56% |
| Share of journalists with an ethnic minority background in the country in 2023 | 22%–28% |
| Share of women among news programme editors-in-chief and managers of the top 5 TV channels with news content in the country in 2023 | 60% |
| Share of persons under the age of 40 among news programme editors-in chief and managers of the top 5 TV channels with news content in the country in 2023 | 0 |
| Share of persons with an ethnic minority background among news programme editors-in-chief and managers of the top 5 TV channels with news content in the country in 2023 | 20% |
| Share of women on the board of the national regulatory authority for media in 2023 | 16% |
| Share of persons with an ethnic minority background on the board of the national regulatory authority for media in 2023 | 32% |

13 One in five of the editors-in-chief at the five most watched TV stations – TV Sitel, TV Kanal 5, TV Alfa, TV Telma, and TV Alsat-M – is of Albanian ethnicity. This percentage does not include data from the public TV stations. Including the above, the percentage would be app. 30% higher.

| | |
|--|---------------------------|
| TREND in the past 3 years: Is the number of minority media in the country growing, declining, or remaining the same? | Trend: Remaining the same |
| Minority media were supported by public funding in 2023. YES/NO/PARTLY | NO |
| Which minority communities are not served by own media or minority programming in national public service broadcasting? | All are represented. |

Sources: Council of Media Ethics of Macedonia (2021-2023); Agency for Audio and Audiovisual Media Services (2023); Macedonian Radio Television (2024); Trpevska (2024); Micevski and Trpevska (2024).

Only the PBS MRT within its channels produces content in the languages of all ethnic communities. However, throughout the overall media landscape, there are not enough programmes aimed at different ethnic groups.¹⁴

14 MRT broadcasts in all languages of the communities listed in the Constitution (Albanian, Turkish, Vlach, Serbian, and Romani, as well as Bulgarian and Greek for Macedonian citizens who live in the neighbouring countries). With the exception of Albanian, this broadcasting is time-limited, with most languages being covered only by 30-minute programmes (Macedonian Radio Television, 2024).

4.6. MEDIA PARTICIPATION

A very small number of media have developed mechanisms for enabling audience participation in the creation of their programmes. The media often use social media profiles for posting contents. In this way they avoid comments on their websites because they do not have enough capacity for administration and moderation thereof.

Table 8: **DATA ON MEDIA PARTICIPATION**

| | |
|--|--|
| <p>The majority of the media in the country commonly provide mechanisms for participation and interaction with citizens/ readers, listeners, viewers (comment sections, letters to the editor, forums, blogs, readers' editor, ombudsman, other type of complaint mechanism, membership, internship, focus groups,...). YES/NO/ PARTLY</p> | <p>Partly</p> |
| <p>TREND in the past 3 years: Is the number of mechanisms for participation in the media in the country growing, declining, or remaining the same (e.g. comment sections closing down or opening, ombudsman established or shut down etc.)?</p> | <p>Trend: Increasing</p> |
| <p>3 most common mechanisms of (citizen) participation in media in the country</p> | <ol style="list-style-type: none"> 1. Comments on social media 2. Citizens calls in contact programmes 3. Letters to the editor |

Sources: Council of Media Ethics of Macedonia (2021-2023); Association of Journalists of Macedonia; Agency for Audio and Audiovisual Media Services (2021-2023c); Investigative Reporting Laboratory Macedonia (2024); social media (2023).

However, a growing trend of audience participation is noticeable. Live shows with enabled audience participation are broadcast on almost all leading television channels. They are very popular and are the most common way of communicating with the public. Complaints submitted to the self-regulatory and regulatory bodies are available to citizens if they want to react to violations of ethical standards by journalists and the media.

Investigative and non-profit online media initiate efforts to involve citizens in their work through calls to report corruption or problems at the local level. Still, such attempts are very limited.

V.

THE FUTURE OF MEDIA USE AND TRUST

The online media and social media are changing the information habits of the audience, with the use of online media growing at the expense of traditional media. This is especially evident among young people, while older generations are still predominantly using the traditional media. However, the trust in media is low, which is especially noticeable in case of online media and social networks.

5.1. MEDIA USE

The new digital environment influences the change in the audiences' habits related to use of media and media content. Despite the fact that the use of internet media and social networks is increasing, television remains the main source of information for citizens (International Republican Institute, 2023). On the other hand, more frequent use of social media for information is evident among younger generations, followed by family, friends, and colleagues (Institute of Communications Studies, 2024).

There were 1.20 million users of social networks in the country (DataReportal, 2021-2023), mostly on Facebook (around 900,000) and Instagram (700,000). Young people (age 15–29) mostly used Instagram (74%) and Facebook (61.7%). Citizens spent on average 2 hours and 29 minutes on social networks. There is no data on young people's behaviour in 2023.

Although the country ranks low on the Media Literacy Index, there is a significant improvement in the level and awareness in institutions and citizens about its importance. In 2021, media literacy was included in formal education, with related content represented in various subjects for grades 1–9 of elementary school (Education Development Bureau, 2021-2024). The Media Literacy Network is actively functioning in the country, with about 80 members – civic organizations, media, institutions, and educational institutions.¹⁵

Television remains the main source of information for citizens. However, more frequent use of social media for information is evident among younger generations.

15 Media Literacy Network. <https://mediumskapismenost.mk/>.

Table 9: **DATA ON MEDIA USE**

| | |
|--|--|
| Media type that is the most often used source of news and information for citizens in the country in 2023 | Television |
| TREND in the past 3 years: Has the media type that is the most often used source of news and information for citizens in the country changed? YES/NO If yes, from which type to which type? | Trend: NO change, TV remains the most often used source of information 2023 - 73% 2022 - 71% 2021 - 82% |
| Which media type was the most often used source of news and information for youth (age between 15 and 29) in the country in 2023? | Social media (Facebook, Instagram, TikTok, Twitter, YouTube...) |
| Audience reach of the media type "Television" in the country in 2023 | 66.3% |
| Top 3 most popular (most used, visited) social media in the country in 2023 | Facebook – 914,200 users Instagram – 711,500 users LinkedIn - 320,000 users |
| Top 3 most popular (most used, visited) social media among youth (age between 15 and 29) in the country in 2023 | Instagram - 73.8% Facebook – 61.7% YouTube – 45.2% |
| Top 3 most popular (most watched) TV news shows in the country in 2023 | N/D |
| Media Literacy Index for the country in 2023 | 39/47 |
| TREND in the past 3 years: Is the Media Literacy Index growing, declining, or remaining the same? | Trend: Growing 2023 - 39/47 2022 - 40/41 2021 - 35/35 |
| Media literacy is a separate subject in elementary or secondary schools. YES/NO/ PARTLY | No. Media literacy is integrated as cross-curricula content, in several different subjects. |

Sources: International Republican Institute (2021-2023); Institute of Communications Studies (2021-2023); Agency for Audio and Audiovisual Media Services (2023); BIRN (2023); DataReportal (2021-2023); Education Development Bureau (2021-2024).

The trends indicate that, in order to adapt to the new digital environment, traditional media should modernize their business models and diversify their contents for the purpose of reaching all segments of the public. In addition, new challenges are created for journalism, especially in terms of maintaining professional and ethical standards in online media. On the other hand, many initiatives to promote media literacy in the country increase citizens' capacity for critical thinking, which is one of the mechanisms for combating disinformation in the online space.

5.2. MEDIA TRUST

Trust in the institutions, including media, is at a low level in the past years due to the complex political developments in the country, the high level of corruption and the non-transparency of institutions. This weakens the capacity of journalism and the media to play a key role in democracy.

In the past three years, citizens have expressed approximately the same level of trust in the media, i.e. 6–7% stated that they had great trust, while 41–48% had some trust (International Republican Institute, 2023; 2022; 2021). In 2023, the media was ranked second on the list of the most trusted institutions, which is an improvement from the previous two years in which the above was ranked in ninth place.

Audiences, including young people, had the highest trust in television (62%) and online media (32%) in 2021 (South East European Network for Professionalization of Media, 2021). Citizens had the least trust in the radio, social networks, and print media.

Audiences, including young people, had the highest trust in television and online media in 2021.

The most watched commercial TV channels at the national level that enjoyed the greatest trust among the audience are TV Sitel, TV Kanal 5, and TV Alsat-M. However, trends show increased awareness of citizens of the possibilities to react to or report unethical reporting in media. Thus, in 2023, 160 complaints and petitions were submitted to the CMEM, Council of Honour at the AJM, and AAAVMS.

Table 10: **DATA ON MEDIA TRUST**

| | |
|---|---|
| Level of overall trust in media in the country in 2023 (in per cent) | 2023 - 7% trust a great deal and 41% somewhat trust |
| TREND in the past 3 years: Is the level of overall trust in media in the country growing, declining, or remaining the same? | Trend: Remaining the same 2023 - 7% trust a great deal and 41% somewhat trust 2022 - 7% trust a great deal and 42% somewhat trust 2021 - 6% trust a great deal and 48% somewhat trust |
| Top 3 most trusted media types in the country in 2023 | (Data for 2021) TV (62%) Online media (32%) Social networks (31%) |
| TREND in the past 3 years: Has the order of the top 3 most trusted media types in the country changed. YES/NO/PARTLY. Which media types have changed places among the top 3? | N/D |
| In which place do the media stand in the ranking of the most trusted institutions in the country in 2023? | 2nd place (Trust a great deal - 7% and Somewhat trust - 41%) |
| TREND in the past 3 years: Is the ranking (place) of the media among the most trusted institutions in the country growing, declining, or remaining the same? | Trend: Growing 2023 – 2nd place (Trust a great deal - 7% and Somewhat trust - 41%) 2022 – 9th place (Trust a great deal - 7% and Somewhat trust - 42%); 2021- 9th place (Trust a great deal - 6% and Somewhat trust - 44%) |
| TREND in the past 3 years: Is the ranking (place) of the media among the most trusted institutions in the country growing, declining, or remaining the same? | N/D |
| TREND in the past 3 years: Is the ranking (place) of journalists among the most trusted professions in the country growing, declining, or remaining the same? | N/D |

| | |
|--|---|
| Citizens use self-regulatory mechanisms to submit complaints when they observe violations of professional conduct of media and journalists. YES/NO | YES |
| TREND: Is the number of citizens using self-regulatory mechanisms to submit complaints when they observe violations of professional conduct of media and journalists growing, declining, or remaining the same? | Big number (over 100) ¹⁶ These numbers refer to complaints submitted by citizens, media, NGOs, and journalists to the CMEM, AJM and AAVMS. 2023 - 160 2022 - 87 2021 - 136 |

Sources: International Republican Institute (2021-2023); South East European Network for Professionalization of Media (2022); Council of Media Ethics of Macedonia (2021-2023); Association of Journalists of Macedonia (2021-2023); Agency for Audio and Audiovisual Media Services (2021-2023).

Despite the growing use of online media and social networks, trust in them is at a very low level. According to citizens, the main advantages of the portals are fast and timely information and the possibility of commenting on topics of public interest, while the negative reactions refer to the low quality of the information content (Trpevska, Mitrevski and Micevski, 2020). Research shows that citizens in general do not trust the media for several reasons, among which the dominant ones are political influence on editorial policy, disinformation, propaganda, and hate speech (South East European Network for Professionalization of Media, 2022).

¹⁶ The numbers are generated from the available data on the CMEM' and the AAVMS' websites, as well as via consultations with the AJM.

VI.

THE FUTURE OF DEMOCRACY

North Macedonia is facing challenges related to the key democratic parameters, primarily in terms of trust in the judiciary system and the rule of law. The country is ranked as “partly free”, with little progress in the overall ranking of countries in the period 2021–2023 (Freedom House, 2023).

The rule of law shows a decreasing trend: in 2023, the country was ranked in 67th place out of a total of 142 countries, which is four positions lower than in 2022 (World Justice Project, 2023). This trend actually reflects the failure of the country to address the issues that lead to a lack of trust in the institutions, especially in the judiciary system, for which only 1% of the citizens expressed that they fully trust the above, in contrast with 3% and 4% in 2021 and 2022, respectively (International Republican Institute, 2023; 2022; 2021). Citizens also stated that they had low trust in the parliament and the government which were ranked in 11th and 10th place on the list of 15 institutions, respectively (International Republican Institute, 2023; 2022; 2021).

Although the degree of corruption perception shows improvement, it remains one of the key issues in society. The overall anti-corruption framework faces significant challenges, primarily because of the weak and selective implementation of policies and laws (Freedom House, 2023). The state anti-corruption commission, which plays a key role in the fight against corruption, in its past composition took proactive steps to guide the public institutions in the prevention of corruption. It initiated a few cases, but their recommendations were mostly not implemented (European Western Balkans, 2023). In 2023, a new composition of the commission was appointed; however, to date they do not show the same energy and activity.

In 2023, two government officials were sentenced to prison for corruption, but both rulings are still pending at the Court of Appeal. The policy of impunity persists, and it is aided by amendments to the Criminal Code of 2023 by which the government reduced penalties for criminal acts, including “abuse of power” and “criminal association” (Amnesty International, 2023).

Political parties are financed by the state based on their representation in the parliament, thus favouring the large political parties at the expense of the

Although the degree of corruption perception shows improvement, it remains one of the key issues in society. The overall anti-corruption framework faces significant challenges.

smaller ones. Civil organizations and the media criticize the current system for financing political parties, regarding it as unfair because it does not provide equal opportunities for political competition (Foundation Open Society – Macedonia, 2022).¹⁷ Due to the smaller budgets, the small parties and independent candidates do not have equal access to media, which reduces the possibilities for balanced reporting and affects the diversity of information that reaches citizens.

In terms of media freedom as one of the key democratic indicators, the country has shown a positive trend in the past three years. The Constitution guarantees freedom of expression and prohibits censorship, but the issues of non-transparency of institutions (European Commission, 2023),¹⁸ the unregulated media market (BIRN, 2023), and frequent attacks on critical journalism still remain present (Reporters Without Borders, 2023).

Table 11: **DATA ON DEMOCRACY**

| | |
|--|---|
| Democracy Index of the country in 2023 | 68/100 partly free |
| TREND in the past 3 years: Is the Democracy Index of the country growing, declining, or remaining the same? | Trend: Growing 2023 - 68/100 2022 - 67/100 2021 - 66/100 |
| What is the Rule of Law Index of the country in 2023? (according to the World Justice Project) | 67/142 |
| TREND in the past 3 years: Is the Rule of Law Index of the country growing, declining, or remaining the same? | Trend: Declining 2023 - 67/142 2022 - 63/140 2021 - 64/139 |
| Level of the Corruption Perceptions Index for the country in 2023 | 2023 - Rank 76/180; score 42/100 |
| TREND in the past 3 years: Is the Corruption Perceptions Index for the country growing, declining, or remaining the same? | Trend: Growing 2023 - score 42/100, ranking 76/180 2022 - score 40/100, ranking 85/180 2021 - score 39/100, ranking 87/180 |

17 “The funds from the state budget for the parties are increasing, whereat more and more parties receive state financing, but the independents lists and candidates are excluded” (Foundation Open Society – Macedonia, 2022).

18 According to the EU Report for 2023, while citizens’ right to access public information is legally established, there is a need to further promote proactive disclosure of information and datasets on official websites, especially at the local level (European Commission, 2023).

| | |
|---|--------|
| There is transparency and open public access to data about the spending of public funds? YES/NO/PARTLY | Partly |
| The legislation on access to public information follows international standards. YES/NO/PARTLY | YES |
| There is a functional and credible independent institution supervising implementation of the legislation on access to public information, including the administration of complaints regarding denied access. YES/NO/PARTLY | YES |
| Were there government or parliament members under prosecution for charges of corruption or other criminal charges in 2023? YES/NO/PARTLY | YES |
| Does legislation allow political party ownership in the media in the country? YES/NO/PARTLY | NO |
| Is there significant political party ownership (i.e. ownership of a group of media of the same or different types, or a media outlet with a large audience or market share or strong influence on public opinion) in the media in the country? YES/NO/PARTLY | NO |

Sources: Freedom House (2021-2023); International Republican Institute (2021-2023); World Justice Project (2021-2023); Reporters Without Borders (2021-2023); Transparency International (2021-2023); European Commission (2023); Agency for Audio and Audiovisual Media Services; Law on Free Access to Public Information (2021); BIRN (2023).

VII.

CONCLUSIONS

The media sector in North Macedonia faces economic challenges, ineffective regulation, and dysfunctional institutions that threaten the independence, sustainability, and pluralism of the media in the long run. The social and political climate is polarized along political and ethnic divisions, which is also reflected in the media eco-system. This weakens the potential of journalism to serve as a control mechanism of the power-holding institutions in a democratic society.

In terms of the socio-economic state of journalists, low wages, insecure work contracts, and disregard for basic labour rights remain the main factors of instability in the profession. This encourages self-censorship and opens up opportunities for owners to influence editorial policy.

The poor media market is characterized by a large fragmentation of the media, in which a contributing factor is the rising number of online media. In such conditions, only the big national commercial televisions yield significant revenues, while the regional, local, non-profit broadcasters, as well as newspapers, remain economically unstable and lack the staff and professional and technical capacities needed to be able to produce quality content. This results in ineffective pluralism, insufficient diversity, and the very low quality content that is offered to the audience.

The increase in funds to the media from the state budget is a serious cause for concern because this can threaten media independence and fair market competition. The idea of establishing a fund to support pluralism for the purpose of financing projects of public interest has been present for several years, but has not been accepted by the governing structures. Instead, the political parties voted for reinstating the controversial provision that allows reintroduction of state advertising. This opens the possibility for emerging media clientelism and for political influences on editorial policies, which can undermine media freedoms and independence.

The increase in funds to the media from the state budget is a serious cause for concern because this can threaten media independence and fair market competition.

The rapid development of online media and social networks as a global trend has brought many challenges related to disinformation, hate speech, and copyright infringement online. Due to the lack of legislation for online media, they operate in the so-called grey zone in terms of legal status, ownership transparency, and financing, as well as professionalism. Media reforms for harmonization of the national legislation with the European standards is expected to address some of the problems in the online sphere.

Young people are increasingly receiving information through online media and social networks in which the presence of disinformation is significant. One of the mechanisms for dealing with this phenomenon is increasing media literacy. It has become part of formal education in North Macedonia since 2021. This is an important step in developing critical thinking and building society's resistance to disinformation.

The weak democratic capacities of the state are particularly noticeable in the area of the rule of law, trust in the judiciary, and transparency of institutions.

There is a slow, yet positive trend regarding the democratic capacities of the state. Freedom of media shows "progress on thin ice" (Association of Journalists of Macedonia, 2023). However, the biggest problem of society is systemic corruption that undermines trust in the institutions. The weak democratic capacities of the state are particularly noticeable in the area of the rule of law, trust in the judiciary, and transparency of institutions. The above are some of the factors that limit the effective work of journalists and production of quality content of public interest. This also limits citizens' access to credible information based on which they can make informed choices.

Without the establishment of effective regulation and transparent policies in all segments of the media industry, free from political interference, as well as further strengthening of media self-regulatory mechanisms, there are no good prospects for professional journalism, media pluralism, and media development in the country. Consistent application of good legal solutions aligned with the best EU standards and effective self-regulation thereof remains a guarantee for mitigating challenges in the media sphere that will have the capacities to support the country's democratic development.

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DEPRIVED MEDIA MARKET, LOW ETHICAL STANDARDS, NEED FOR EFFECTIVE LEGISLATION

The Future of the Media in North Macedonia – Facts and Trends

This publication is the result of research undertaken as part of the project **“Our Media: A civil society action to generate media literacy and activism, counter polarisation and promote dialogue”**. The second research series was conducted in the thematic framework titled **“The Future of the Media in the Western Balkans and Turkey”**, focusing, in 2024, on collecting and analysing the facts and trends on media and democracy in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia, and Turkey.

The project **“Our Media: A civil society action to generate media literacy and activism, counter polarisation and promote dialogue”** is jointly implemented by nine media development organisations from the Western Balkans and Turkey with the financial support of the European Union. The coordinator of the three-year project is the Foundation Mediacentar Sarajevo. Partners in the project are the Albanian Media Institute in Tirana; Bianet in Istanbul; the Macedonian Institute for Media in Skopje; the Montenegro Media Institute in Podgorica; the Novi Sad School of Journalism; the Peace Institute in Ljubljana; the Press Council of Kosovo in Pristina; and the South East European Network for Professionalization of Media (SEENPM).