

MONITORING MEDIA PLURALISM IN THE DIGITAL ERA

APPLICATION OF THE MEDIA PLURALISM MONITOR IN THE EUROPEAN UNION, ALBANIA, MONTENEGRO, THE REPUBLIC OF NORTH MACEDONIA, SERBIA & TURKEY IN THE YEAR 2021

Country report: The Republic of North Macedonia

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Research Project Report

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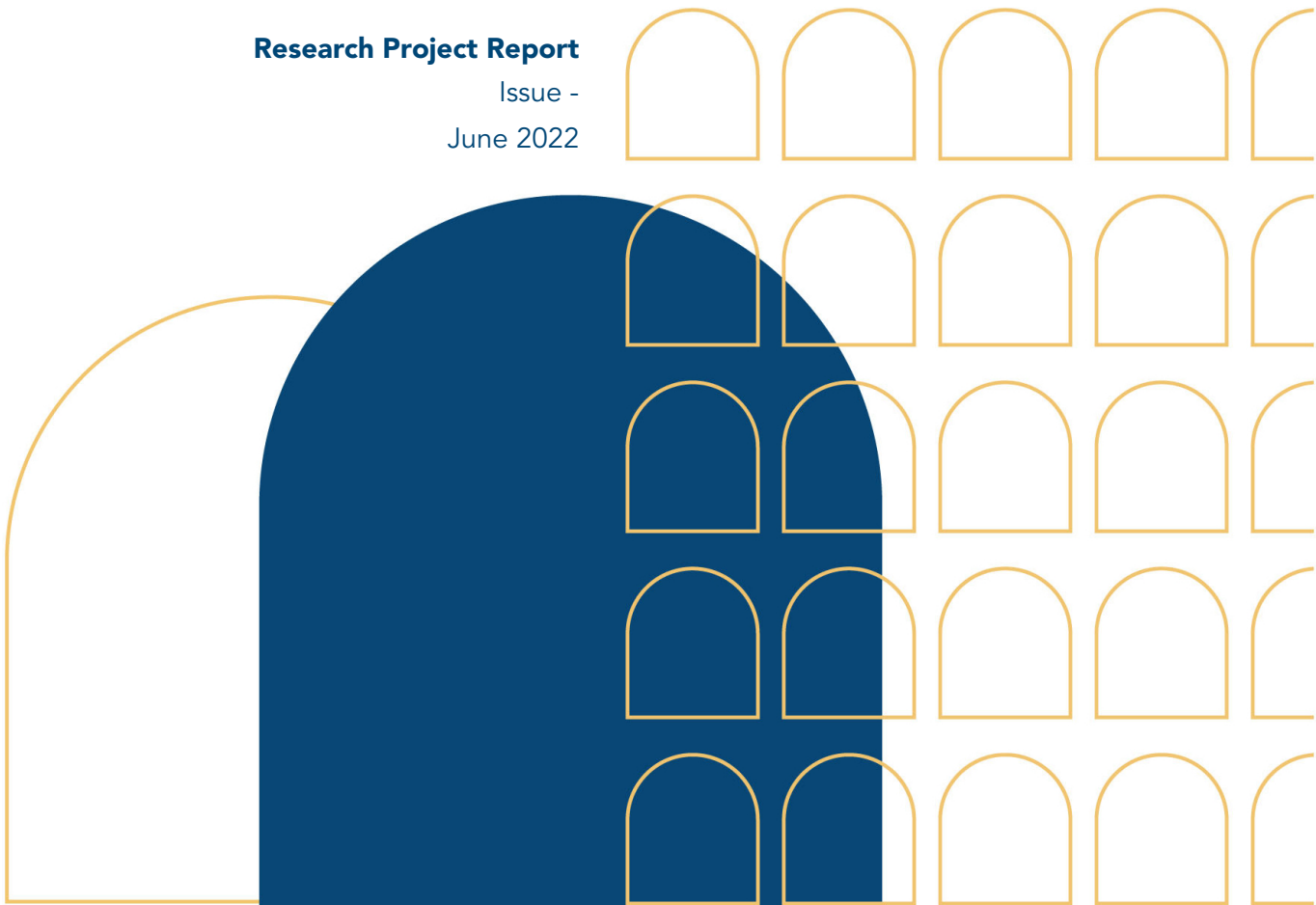


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1. About the project

1.1. Overview of the Project

The Media Pluralism Monitor (MPM) is a research tool designed to identify potential risks to media pluralism in the Member States of the European Union and in candidate countries. This narrative report has been produced on the basis of the implementation of the MPM carried out in 2021. The implementation was conducted in 27 EU Member States, as well as in Albania, Montenegro, The Republic of North Macedonia, Serbia and Turkey. This project, under a preparatory action of the European Parliament, was supported by a grant awarded by the European Commission to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute.

1.2. Methodological notes

Authorship and review

The CMPF partners with experienced, independent national researchers to carry out the data collection and to author the narrative reports, except in the case of Italy where data collection is carried out centrally by the CMPF team. The research is based on a standardised questionnaire that was developed by the CMPF.

In The Republic of North Macedonia the CMPF partnered with Igor Micevski and Snezana Trpevska (Research Institute on Social Development - RESIS), who conducted the data collection, scored and commented on the variables in the questionnaire and interviewed experts. The report was reviewed by the CMPF staff. Moreover, to ensure accurate and reliable findings, a group of national experts in each country reviewed the answers to particularly evaluative questions (see Annexe II for the list of experts). For a list of selected countries, the final country report was peer-reviewed by an independent country expert.

Risks to media pluralism are examined in four main thematic areas: Fundamental Protection, Market Plurality, Political Independence and Social Inclusiveness. The results are based on the assessment of a number of indicators for each thematic area (see Table 1).

Fundamental Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political independence of media	Access to media for minorities
Protection of right to information	News media concentration	Editorial autonomy	Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Online platforms concentration and competition enforcement	Audiovisual media, online platforms and elections	Access to media for women
Independence and effectiveness of the media authority	Media viability	State regulation of resources and support to media sector	Media Literacy
Universal reach of traditional media and access to the Internet	Commercial & owner influence over editorial content	Independence of PSM governance and funding	Protection against illegal and harmful speech

Table 1: Areas and Indicators of the Media Pluralism Monitor

The digital dimension

The Monitor does not consider the digital dimension to be an isolated area but, rather, as being intertwined with the traditional media and the existing principles of media pluralism and freedom of expression. Nevertheless, the Monitor also extracts digital-specific risk scores, and the report contains a specific analysis of risks related to the digital news environment.

The calculation of risk

The results for each thematic area and indicator are presented on a scale from 0 to 100%.

Scores between 0 and 33%: low risk

Scores between 34 and 66%: medium risk

Scores between 67 and 100%: high risk

With regard to indicators, scores of 0 are rated 3% while scores of 100 are rated 97% by default, in order to avoid an assessment of total absence, or certainty, of risk.

Disclaimer: The content of the report does not necessarily reflect the views of the CMPF, nor the position of the members composing the Group of Experts. It represents the views of the national country team that carried out the data collection and authored the report. Due to updates and refinements in the questionnaire, MPM2022 scores may not be fully comparable with those in the previous editions of the MPM. For more details regarding the project, see the CMPF report on MPM2022, available on: <http://cmpf.eui.eu/media-pluralism-monitor/>.

2. Introduction

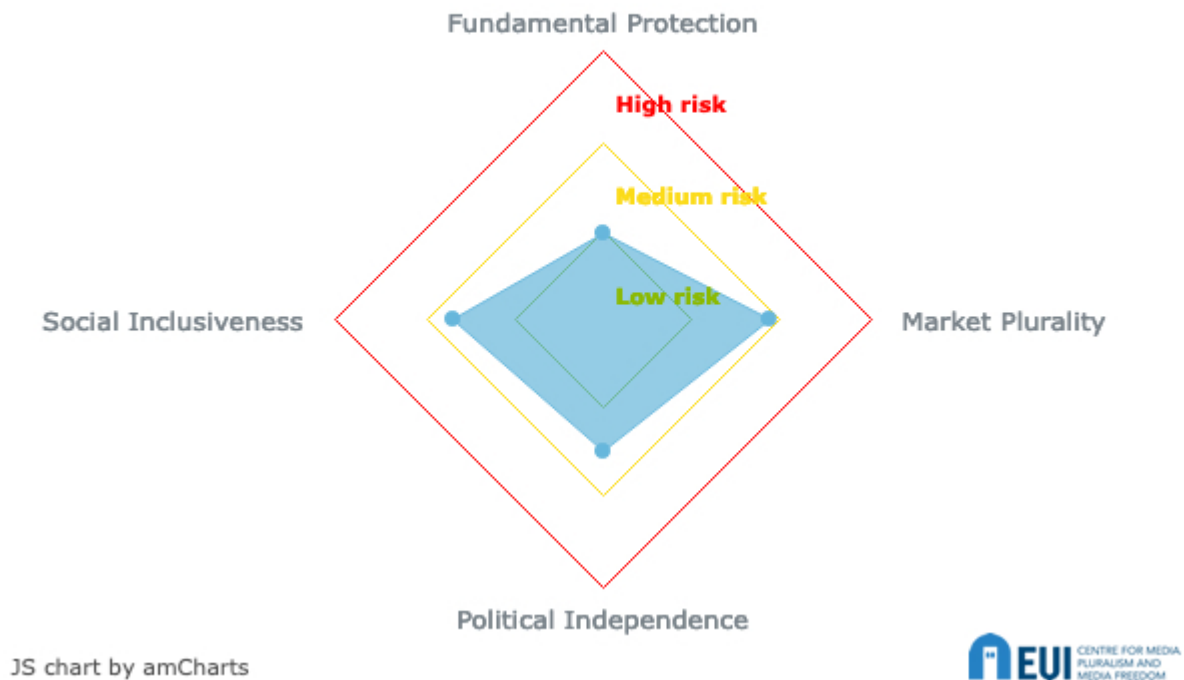
- **Country overview, minorities, languages:** The country covers a territory of 25,713 square kilometres. According to the results of the latest Census in the Republic of North Macedonia conducted in 2021, the resident population in the country is 1,836,713 inhabitants^[1]. The ethnicity of the resident population in the country is as follows: 58.44% of the population declared themselves as Macedonians, 24.30% as Albanians, 3.86% as Turks, 2.53% as Roma, 0.47% as Vlachs, 1.30% as Serbs, 0.87% as Bosniaks, 7.2% did not declare themselves according to ethnicity^[2] and the remaining 0.26% are of other ethnic affiliation. Macedonian is the official language of the entire territory, while Albanian is also the official language in the central level institutions and in 25 out of 80 municipalities and in the capital Skopje.
- **Economic situation:** In its regular Economic Report for the Western Balkans, the World Bank emphasized that the whole region, including North Macedonia, “was rebounding from the COVID-19-induced recession of 2020, thanks to a faster-than-expected recovery in 2021”^[3]. The economic growth of North Macedonia was projected with 4.6 percent for 2021, but the recovery was still assessed as slow and fragile. The recession in 2020 and its aftermath caused many distortions in the labor market. Youth unemployment rose to 37.7 percent in 2021, up 5.4 percentage points from June 2020, further worsening youth employment prospects. Continued government support measures have helped mitigate the impact of the crisis on households and firms but have further increased public debt. North Macedonia improved its position in the Corruption Perception Index for 2021 – while in 2020 it was ranked on the bottom of the Western Balkans list, in 2021 it was ranked with Kosovo (in 87th place with 39 points) behind Montenegro as the highest-ranked WB country (in 64th place, with 46 points). Serbia was ranked in 96th place with 38 points, and Albania and Bosnia and Herzegovina in 110th place with 35 points.^[4]
- **Political situation:** In September, the overdue Census of the population was eventually conducted, after almost two decades of politicisation of the process for ethno-political purposes. The local elections held in October resulted in a huge defeat for the ruling Social Democratic Union of Macedonia (SDSM) which urged the resignation of the prime minister Zaev and created political uncertainty and controversies over the creation of new coalition government. The unprepared healthcare system, the high mortality rate of Covid-19, the corruption scandals with senior government officials, the fire at the modular Covid-19 hospital in Tetovo and the subsequent refusal of the Prime Minister Zaev to accept the resignation of the Minister of Health were probably accumulated reasons that led to a drastically reduced support for the SDSM in the local elections. In addition, another postponement of the EU decision to open accession negotiations for North Macedonia resulted in a further decline of EU credibility among the population. Earlier, in March 2020, the EU Council decided to open the long-awaited accession negotiations, but just before the first intergovernmental conference planned for November 2020, Bulgaria blocked the adoption of the Negotiating framework over issues related to identity and history.
- **Media market:** Although the country is small and its economy quite weak, the media market is very fragmented in terms of the number of players. In the *television* market, the public service broadcasts programs on 5 TV services, while there are also 44 private TV stations at various levels: 5 terrestrial TVs at state level, 4 cable TVs at state level, 2 satellite TVs at state level, 6 terrestrial TVs at regional level, 12 cable TVs at regional level and 15 local TVs at local level. In total, these are 44 private TV stations. The *radio market* is also very fragmented: in addition to public service broadcaster with 3 radio

services, radio programs are broadcasted by 62 commercial and 4 non-profit radio stations. In the commercial radio sector, there are 4 stations at state level, 17 at regional and 42 at local level. In the *print* media sector, there are: 5 daily newspapers, 2 weeklies and at least 10 other periodicals. In the *online* media sector, there are no precise data, but the number of digital native news media is estimated between 150 and 200. According to the Agency for Electronic Communications, the total number of subscribers to various TV platforms in the third quarter of 2021 was 423.915, out of which: 49.28% are subscribed to a cable platform, 35.03% to the IPTV platform, 9.97% to a DVBT platform, and 5.72% to a satellite platform. No new surveys of audience information habits were conducted in 2021, The published data from the end of 2020 on the audience news consumption, show that the younger age groups (15-18, 19-29 and 30-39) are predominantly (80-85%) informed from the internet. The sources from which they search for daily information are: 89% from social networks, 55% from news aggregators, 48% from the web sites of digital native news media and 37% from the web sites of domestic TV stations.^[5]

- **Regulatory environment:** There were no changes in the legislation during 2021. The procedures for appointing the new members of the Council of the Agency for Audio and Audiovisual Media Services and the Council of MRT (Public Broadcasting Service) were not implemented in the Parliament, although they were one of the preconditions for continuing the media reforms. Also, by the end of the year, neither the expected amendments to the Criminal Code, nor the amendments to the Law on Civil Liability for Defamation and Insult were adopted by the Parliament. The changes in the Criminal Code are aimed to increase the safety of journalists in the country, while the amendments of the Law on Civil Liability for Defamation and Insult make the provisions of this law more favorable to journalists, in terms of reducing penalties for non-pecuniary damage. In addition, the relevant ministry has not started yet the procedure for aligning the national legislation with the EU Audiovisual Media Services Directive. The government initiated amendments to the Law on Audio and Audiovisual Media Services in order to reintroduce state advertising, but the proposal was withdrawn following reactions from journalists' associations and experts.

3. Results of the data collection: Assessment of the risks to media pluralism

The Republic of North Macedonia: Media Pluralism Risk Areas



After the rapid undeniable improvement of the state of media pluralism in North Macedonia, induced by the post-2017 overall democratic transformation - it is now evident that reformist processes have become stagnant, and in some segments even in slight decline. Reform fatigue, clientelistic pressures from the political domain towards media (and vice versa) and party-political confrontations, coupled with structural pressures not exclusive to North Macedonia - such as the disinformation and misinformation flooding of the public sphere, exacerbated by health challenges concerning the COVID 19, have all partaken in the assessment that the media system in this country needs a new impetus for constructive change.

Fundamental Protection (32%). Legal safeguards concerning freedom of expression and protection of the right to information are in place. In practice, they are mostly respected – there has been some weakening in practising freedom of expression, but simultaneously there have been improvements in the domain of actual protection of the right to information. The protection of journalistic sources is widely recognised and mainly respected in practice. The media authority enjoys greater independence in comparison to the period prior to 2017. The legal provisions on the universal reach of traditional media and access to the Internet are satisfactory, though North Macedonia needs to do more with respect to its average internet connection speed.

Market Plurality (62%). Ownership concentration and transparency of digital news media is still not regulated, though in reality there has been an actual improvement in this domain because the Central Registry has made the data on real online outlets owners publicly accessible. Vulnerabilities in the domain of online platforms concentration and competition enforcement have witnessed significant increase, due to relevant institution's lack of ability to monitor the online media sector for possible instances of media concentration and to enable enforcing of legally binding competition rules. Viability of media is still fragile, regardless of the slight improvement witnessed.

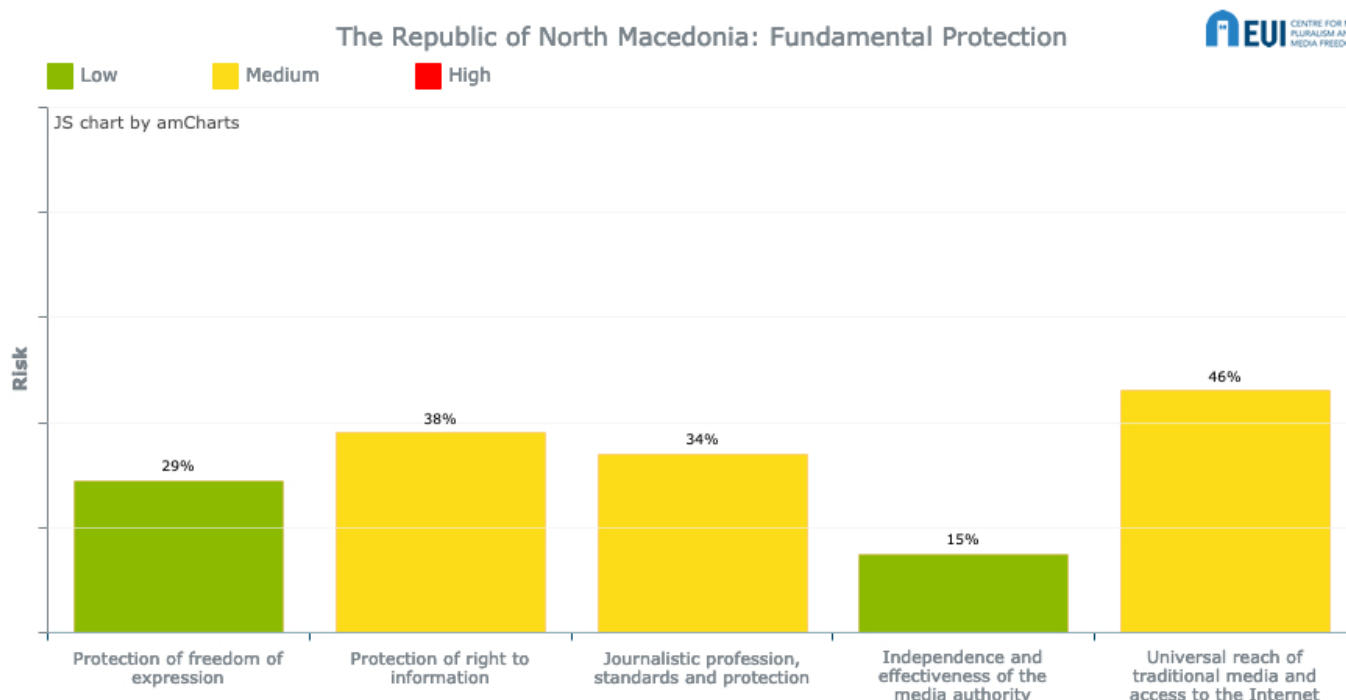
Political Independence (49%). Compared to last year, the risk in this area has decreased by one

percentage point. Some ties between political actors and traditional media are persistent in this clientelistic society, which poses a tangible risk for political independence of media. These informalities persevere, despite the fact that legal safeguards aimed at preserving political independence of print and broadcast media alike, are in place. Existing self-regulation tools are insufficient to counteract clientelistic trends. There are apparent vulnerabilities in the legislation and practice concerning party-political advertising in the media that is paid with funds from the state budget and the lack of transparency of political campaigns party spendings for online platforms. A vulnerability is also exposed concerning the allocation of funds from the municipal budgets in the local media, despite the legal ban for any form of state advertising. The funding of the PSM is not securing its complete stability and independence and the appointment of its supervisory body is clogged in the Parliament due to the lack of 'political' consensus.

Social Inclusiveness (56%). The risk in this area is almost the same as last year when it was 58%. There are some vulnerabilities concerning the access of the smallest cultural minority groups to the media. This concerns both the private and the public broadcast media. Communities outside the capital are also at a higher risk regarding access to quality programmes because community media are underdeveloped, while local and regional private media lack sustainability. The risk is slightly increased in 2021 in terms of access to media for women, due to the lower share of women among executives of private TV companies. Media and digital literacy skills of the entire population are low and media literacy is still not part of the formal curriculum, though some important steps have been made in that direction in the past year.

3.1. Fundamental Protection (32% - low risk)

The Fundamental Protection indicators represent the regulatory backbone of the media sector in every contemporary democracy. They measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for freedom of expression and the right to information; the status of journalists in each country, including their protection and ability to work; the independence and effectiveness of the national regulatory bodies that have the competence to regulate the media sector, and the reach of traditional media and access to the Internet.



The assessment for the **Protection of freedom of expression** indicator points to low risk (29%). However,

the estimated risk had risen in comparison to the 2020 report when it was 18%. The change is mostly due to a few documented infringements over the course of the campaign for the local elections in 2021 and the Public Prosecutor's inability to act in a timely fashion^[6]. Notwithstanding this, the Legal safeguards for the protection of freedom of expression, both offline and online, are incorporated into the Constitution and laws^[7]. The restrictions are clearly defined and pursue a legitimate aim as foreseen in Article 10(2) ECHR. In general, these safeguards were respected in practice as the state consistently refrained from restricting one's right to free speech. Legal remedies which citizens can invoke in cases of infringement of this right are in place. However, some level of vulnerability exists due to the absence of effective mechanisms to monitor and measure the quality of judicial outcomes in this domain^[8]. Online platforms, news aggregators and online news media are insufficiently transparent with respect to their rules on removing and filtering content, which also poses some risks concerning this indicator.

The risk for the **Protection of the right to information** indicator is 38%, which is an improvement in comparison to the 2020 report when it was estimated at 50%. This change is mostly due to the continuous though still small-scaled awareness-raising activities by anti-corruption authorities and civil society organisations (CSOs) on the issue of whistleblowing. The right to information is recognised in the Constitution and in the Law on Free Access to Information of Public Character^[9], the restrictions are clearly defined in accordance with international standards, and there is an appeal mechanism that is generally effective. However, the main risks here arise from the fact that the public administration does not always act according to procedures for providing access to public information^[10], the legal framework for protection of whistle-blowers is still not fully implemented and the number of filed reports to the respective bodies was still very low^[11].

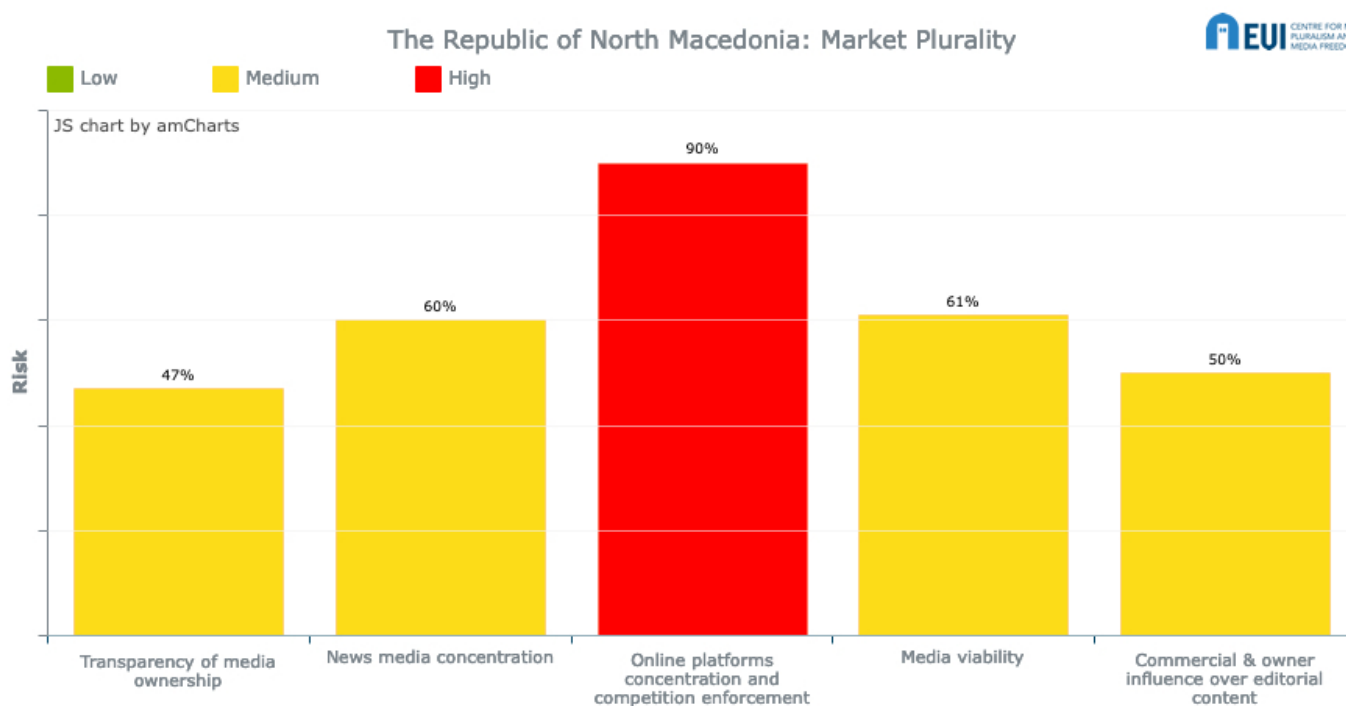
The indicator on **the Journalistic profession, standards, and protection** points to a medium risk of 34% and represents a slight drawback in comparison to the estimated 30% in the 2020 report. This outcome is mostly due to three new reported cases of strategic lawsuits against public participation (SLAPPs)^[12] against journalists – two of which are made by an opposition political party and one by a state institution. Still, an overall assessment stands - the protection of journalistic sources is widely recognised and mainly respected in practice, and the Data protection law^[13] incorporates the derogation regarding freedom of expression and journalistic activities. The main risks arise at the points of persistent weakness: the country has no anti-SLAPP framework, the journalists' working conditions within their newsrooms are largely unfavourable^[14], online harassment against journalists is still present^[15] and redress mechanisms for this problem are weak or inefficient^[16]. Even so, journalists and their associations enjoy much greater freedom in comparison to the period prior to 2016. Also, there are no documented serious physical attacks on journalists and the media, and there were no killings, arbitrary arrests, or imprisonments of journalists.

The estimated risk for the **Independence and effectiveness of the media authority** indicator is low (15%). The member appointment procedures for this body are designed to minimise the risk of interference, its competencies and sanctioning powers are clearly defined in the law^[17], and appeal mechanisms exist and are largely effective. A general assessment is that the regulator used its powers in an independent and transparent manner in 2021. The public body remained open to cooperation with CSOs and other stakeholders, especially in its efforts to increase media literacy among citizens and to improve access to media for people with sensory impairments. Still, risks exist since, beginning from 2018, the government allocates fewer funds to the regulator^[18] than the envisaged percentage in the Law for the work of the regulator and the procedure for appointing new members of the Council is still blocked in the Parliament due to lack of consensus between the main political parties.

The indicator on the **Universal reach of traditional media and access to the Internet** scores at 46%. The universal coverage of the public service media (PSM) services is legally guaranteed, and their transmission is secured through DTT transmitters, cable networks and IPTV platforms. According to the State Statistical Office, broadband internet is widely available. Nearly 80% of the total number of households have access to the internet, while 70% to fixed broadband connections^[19]. However, the average Internet connection speed in North Macedonia is still much lower than in many other countries, which increases the risk measured for this indicator. According to the Worldwide Broadband Speed League 2021, North Macedonia is ranked only slightly better than in 2020 - at the 107th position, with a mean download speed of 15.38Mbps.

3.2. Market Plurality (62% - medium risk)

The Market Plurality area focuses on the economic risks to media pluralism which derive from a lack of transparency and the concentration of ownership, the sustainability of the media industry, the exposure of journalism to commercial interests. The first indicator examines the existence and effectiveness of provisions on the transparency of media ownership. Lack of competition and external pluralism are assessed separately for the news media (production of the news) and for the online platforms (gateways to the news), and we consider separately horizontal and cross-media concentration; the concentration of the online advertising market; and the role of competition enforcement. The indicator on media viability measures the trends in revenues and employment, in relation to GDP trends. The last indicator aims to assess the risks to market plurality that are posed by business interests, in relation to the production of editorial content, both from the influence of commerce and owners.



The **Transparency of media ownership** indicator is estimated at medium risk - 47%, which is an improvement in comparison to the situation in 2020 when the estimated risk was at 59%. The change is mostly due to the increased actual transparency of the ownership of the traditional and digital media in the country^[20]. Notwithstanding this, the media related legal environment is unchanged - although the Law on Media contains obligations for ownership transparency of the audiovisual and print media, there is no legal

obligation for digital news media, which is why this indicator is estimated with medium risk^[21]. Ownership data is regularly published by the audiovisual and print media, and the regulatory body may impose sanctions in case of non-compliance. Also, most of the members of the voluntary Registry of Professional Online Media in the country comply with their ethical obligation to publish such data on their websites.

There is an estimated risk of 60% for the **News media concentration** indicator. A somewhat significant concern remains in this domain, since, in the media legal corpora, provisions that impose restrictions on the concentration of ownership for digital news media outlets do not exist. In addition, there is no relevant oversight body that monitors this issue – the Agency for Audio and Audiovisual Media Services is authorised only for the broadcasting media. The existing Law on Media, however, contains detailed rules for the broadcasting sector and prohibits the concentration between broadcasting and daily newspapers. Nevertheless, these provisions are viewed by media experts as restrictive and obsolete; therefore, they likely present an obstacle to the development of the media sector – in terms of inhibiting its defragmentation and disabling economic sustainability^[22].

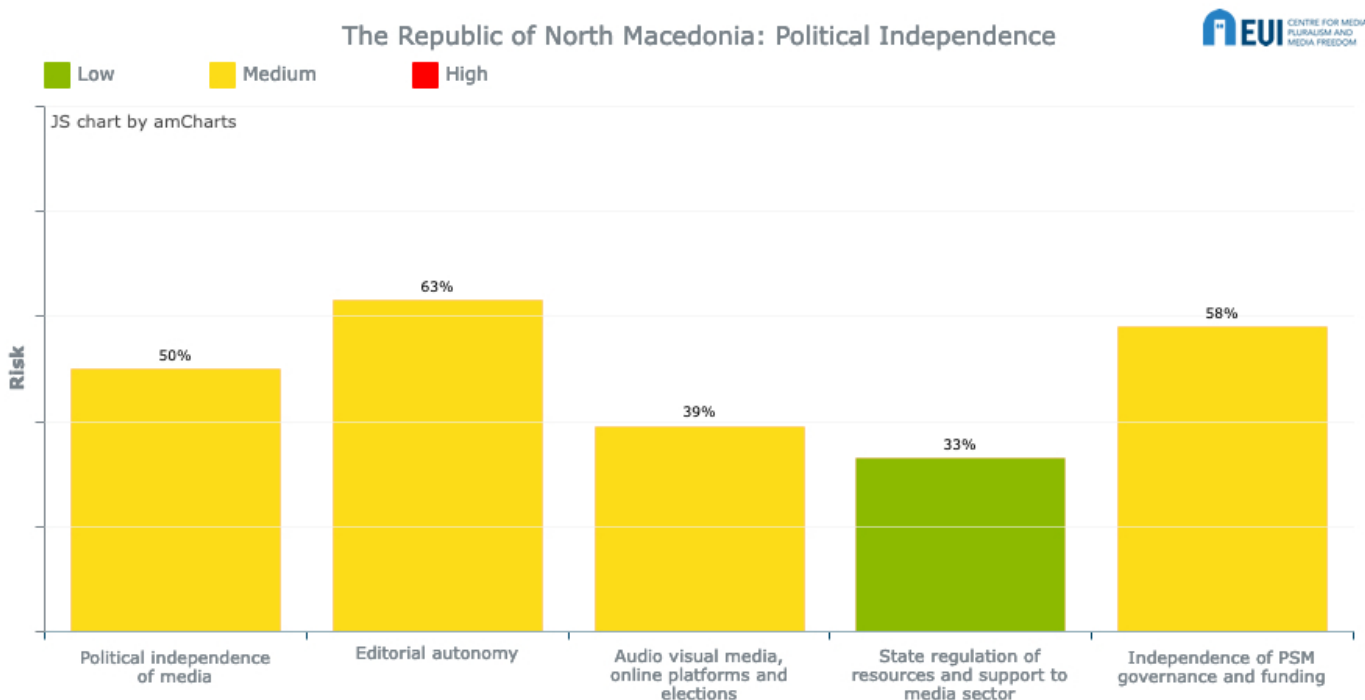
The **Online platforms concentration and competition enforcement** indicator signals an exceptionally high level of vulnerability – the estimated risk in its domain is 90%. This estimation marks a deterioration in comparison to the situation in 2020, when it was projected at 80%. The key point of concern is the lack of capacity and inability of the Commission for protection of competition, the oversight body in this domain, to monitor the possible instances of media concentration in the evolving ecosystem of media providers and digital intermediaries and in the digital advertising market. In general, issues of competition regulated by the Law for protection of competition also encompass the digital media cluster. However, there is a lack of knowledge, reliable data and tools to address this problem^[23]. Digital news media face strong competition from news aggregators and social networks^[24], while there is still no development in the competition and regulation policy to address these challenges. The fact also remains that, the online advertising revenue share of online media is still a big unknown - there has been no scrutiny on the relations on the digital advertising market in terms of competition between the platforms and the digital news media. North Macedonia is yet to transpose the Directive (EU) 2019/790 of the European Parliament, concerning copyrights and related rights, in its national legislation – so publishers are still exposed to vulnerability in terms of lack of practice of remuneration by digital platforms.

The **Media Viability** indicator scores medium on the risk scale (61%). This risk assessment outcome is more optimistic than the one estimated in 2020, when the risk was projected at 77%. This change is documented even though advertising revenues in the audiovisual sector have steadily decreased in the past years, after they were artificially inflated with budget-funded campaigns during the rule of the semi-authoritarian populist government between 2006 -2016^[25]. There is no available fresh data concerning the print and online^[26] media concerning advertising revenues. Local media have also been evidenced as vulnerable concerning advertising revenues^[27]. The effects of the COVID-19 crisis are apparent in the entire economic ecosystem which influences advertising revenues, but it is difficult to assess the exact risks in this domain due to the lack of precise data for the revenues in different media sectors.^[28] What is certainly known, however, is that digital native news media attract less revenues than entertainment digital media, news aggregators and social networks. This has a negative impact on the already poor economic status of journalists^[29]. The situation is unchanged in comparison to 2020 as unions reported about some salary cuts in some media outlets. However, the number of employed journalists in the media outlets remains constant. A financial support scheme (direct subsidies) exists only for the print media^[30], while to mitigate the negative consequences from the pandemic the Government and the media regulator in 2021 also agreed on indirect subsidies to all broadcasters^[31].

The **Commercial & owner influence over editorial content** indicator, scores at 50% in 2021. The existing Law on Media does include provisions for protection of the work position of journalists in their news media organizations ^[32]. However, in practice, most journalists work in insecure and precarious environments. It is not rare for the journalists' professional organisations to document cases of journalists who do not have signed work contracts. By Law, all media were obliged to ask the newsroom for opinion before the appointment of editor-in-chiefs and to adopt a general act which regulates the relations between media publisher, editors, and journalists ^[33]. Only few private media have adopted such general acts and in practice consulted the newsroom about the appointment of editors-in-chief ^[34]. The rules of the Code of Journalists are designed to prevent commercial and business influences on journalists. However, it often happens that, in practice, owners' commercial interests play a decisive role in shaping the editorial policy.

3.3. Political Independence (49% - medium risk)

The *Political Independence indicators assess the existence and effectiveness of regulatory and self-regulatory safeguards against political bias and political influences over news production, distribution and access. More specifically, the area seeks to evaluate the influence of the State and, more generally, of political power over the functioning of the media market and the independence of the public service media. Furthermore, the area is concerned with the existence and effectiveness of (self)regulation in ensuring editorial independence and the availability of plural political information and viewpoints, in particular during electoral periods.*



The estimated risk for the **Political independence of media** indicator is projected at 50%, which marks a slight setback in comparison to 2020 when it was marked at 40%. In effect there were limited changes in this domain over the course of 2021- the difference in the score is mostly due to the re-evaluation of the situation with the independence of the few existing print media and news agencies. Namely, some of the five existing print outlets are under some influence of political centres of power ^[35], and this is reflected in the assessment regardless of the newspapers' insignificant influence on public opinion. In addition, since the safeguards for political independence of news agencies are not incorporated in the specific media

legislation, the risks in this area are visible. This assessment is therefore not due do actual influence, but due to legislative vulnerabilities of the domain. Other issues remain the same as in the last report: legal provisions to prevent a conflict of interest between media owners and state officials, party groups and politicians exist only for the audiovisual media; there are no examples of media owners being members of political parties. However, the owners of some of the most influential (especially broadcast) media outlets have been proactive in their attempts at establishing connections with the ruling political parties to achieve their interests, or even to pressure the government using political leverage in exchange for economic gain. Political parallelism is still a prevailing feature of the media system^[36].

The **Editorial Autonomy** indicator risk remains to be estimated at 63%. Legal safeguards aimed at preventing political influence on the appointment of editors in print media are still in place, but some provisions are ambiguous and not obligatory^[37], while for the audiovisual media the independence of editorial policy is one of the basic principles stipulated in the Law^[38]. However, as a persistent feature of any clientelistic political system, editors-in-chiefs of most influential media, tend to be in close relationship with media owners and use these ties to pursue their political and business interests. The Code of Journalists contains rules according to which the distance from political actors is an imperative for journalists, but this provision is often violated, especially by online media professionals.^[39] Having said this - and in a comparative historical overall perspective - the manifestation of these ties is, at present, still less pronounced than it was the case prior to the political crystallisation of 2017^[40].

The indicator for the **Audiovisual media, online platforms, and elections**, is marked with a medium risk of 39% for 2021. This estimation is slightly higher than the estimation for 2020 because of the assessment that there are apparent vulnerabilities in the legislation and practice concerning transparency of campaign party spendings for online platforms. Political parties are obliged by the Electoral Code and by the Law on the financing of the political parties, to submit transparent reports on their regular and electoral expenditure to relevant institutions and oversight bodies, including their media spending. However, from the last known audits of the State Audit Office for the local elections of 2021, as from previous audits, we know that in practice political parties circumvent legislative obligations, more obviously, by not showing separately the costs for political advertising online, but only as a total amount for renting advertising space paid to marketing agencies^[41]. In addition, vulnerability is exposed by the fact that neither the Electoral Code nor any other cluster of the national legislation, contain provisions on political advertising on social networks. The reason why the risk for this area is not estimated at a higher degree is the existence of legislative safeguards for impartiality of the Public Service Media and since the Public Service Broadcaster is effectively improving its news and current affair programmes in this regard in comparison to 2020^[42]. Overall, however, potentially considerable risk is lurking behind this area because, as smaller political parties regularly complain, the existing legal rules for the allocation of party-political advertising in the private TV and radio broadcasters do not provide equal conditions for all political contenders.^[43]

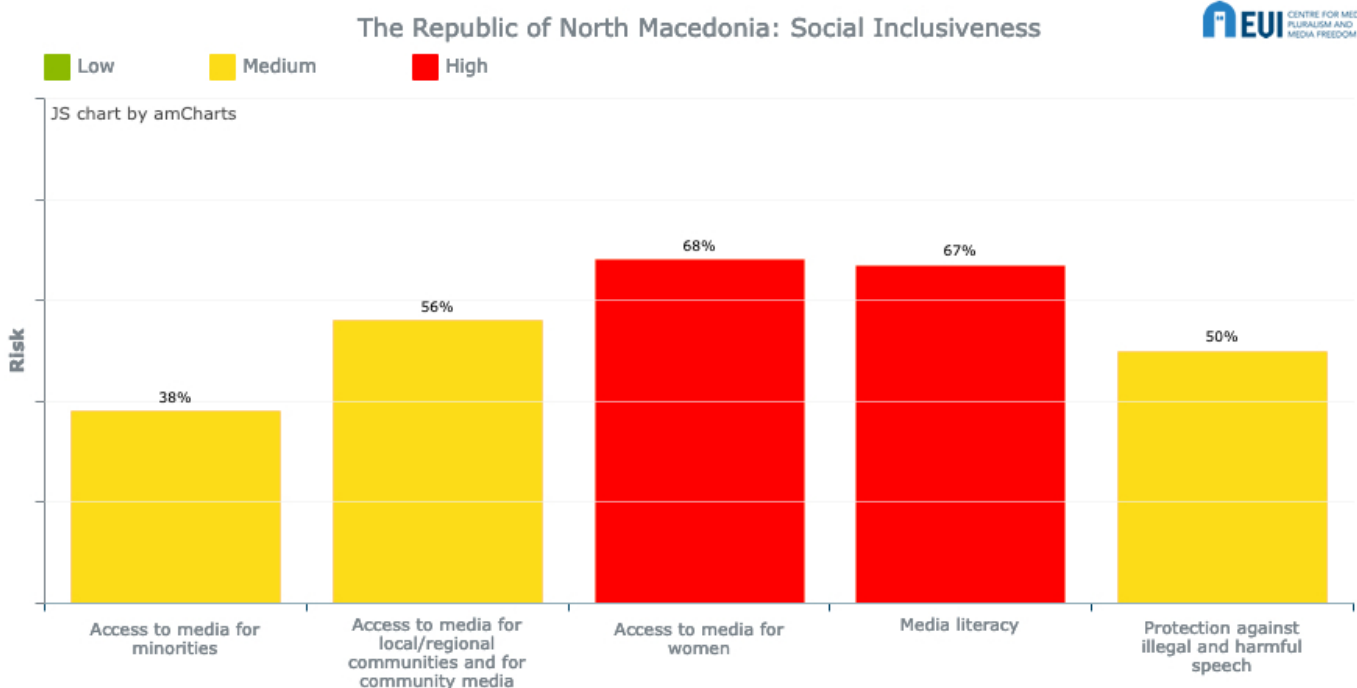
State regulation of resources and support to media sector is assessed with low risk for 2021 - at 33%. This marks an improvement from the medium risk of the year before when it was estimated at 46%. The change is mostly, due to the fact that: direct subsidies for the print media were awarded in 2021 based on fair and transparent criteria and the two measures taken in February of 2021 to provide indirect subsidies to media because of Covid-19 crisis, were adopted and implemented in a fair and transparent fashion^[44]. During the 2020 the process of allocating indirect subsidies was lacking transparency. Having said this, however, a considerable vulnerability is exposed concerning state advertising distribution on the local level media. Although the Law on Audio and Audiovisual media Services contains a provision that bans state advertising in the audiovisual media sector, there is a widely accepted practice at local level where

municipalities and public enterprises allocate some funds from their budgets to the local private media for services. This process is untransparent and it creates clientelistic interconnectedness between the local authorities and private media at local level.^[NOTA_1255]

The **Independence of PSM governance and funding** indicator is at the level of medium risk (58%). Though the legal safeguards concerning the appointment of supervisory and managerial bodies of the Public Service Broadcaster have been visibly strengthened with the amendments of 2018^[45], in practice, the appointments are clogged in the Parliamentary procedures for years, due to the lack of ‘political’ consensus. Since the Council appoints all other managerial and oversight positions within the PSB, these positions are consequently exposed to some level of vulnerability. In addition, the funding of the PBS is still not securing its stability and independence in 2021. The budget allocated to PSB was eventually reduced to around 0,5%, although the necessary amount for its efficient functioning was estimated to be 1% from the State Budget. As a result, the revenues of the public broadcasting service have been declining for the past five years, and in 2020 they were reduced by about 5.7 million euros compared to 2015^[46]. These are the reasons why, in its 2021 Progress Report, the European Commission stressed that “... the Government continued to use its discretionary right in the distribution of state funds to the broadcasting sector, further decreasing the allocations for the public service broadcaster, media regulator and broadcasting public enterprise, contrary to the requirements introduced in the Law on Audio and Audiovisual Media Services.”^[47]”

3.4. Social Inclusiveness (56% - medium risk)

The Social Inclusiveness area focuses on the access to media by specific groups in society: minorities, local and regional communities, women and people with disabilities. It also examines the country’s media literacy environment, including the digital skills of the overall population. Finally, it also includes new challenges arising from the uses of digital technologies, which are linked to the Protection against illegal and harmful speech.



The **Access to media for minorities** indicator is marked with a risk of 38%. The relevant Law guarantees

access to the airtime of the Public Service Broadcaster to recognised cultural minorities^[48] – North Macedonia is by its Constitution a state in which cultural diversity is respected. In 2021, the Macedonian Radio and Television increased the number of its TV channels, and the smaller minority language newsrooms are aired on a separate channel, which gives them more airtime both for news, education and entertainment programs. However, their main problem is the lack of technical and human resources to ensure a decent quality programming. The financing of the MRT is a dominant problem even for the majority Macedonian language and for the largest non-majority Albanian language newsrooms - for the smaller cultural communities (Roma, Vlachs, Serbs, Bosniacs, Turks) the overall problems are more noticeable. In the private broadcasting industry, there are also some vulnerabilities concerning languages of minority vulnerable groups, not stemming from the constitutional or legislative arrangements but rather structural weaknesses concerning the commercial sustainability of media concerning the number of their respective audiences. The smallest language communities are here most vulnerable^[49]. The legislative arrangement encourages media (public and private) to ensure accessibility to audiences with various types of disabilities^[50], however the practice is still lagging behind.

There is a medium risk of 56% for the **Access to media for local/regional communities and for community media** indicator, which marks an overall improvement in comparison to the previous edition of the MPM when the risk was estimated at 63%. This assessment is mostly due to the fact that in this year's index a new variable was added that measures the practice in connection to the existence and number of local correspondents engaged by the Public Service Media. This variable poses a medium risk for North Macedonia's PSM as the Macedonian Radio and Television has managed to renew its local branches in 10 cities and towns throughout the country as the Law obliges^[51]. However, most of the journalists working in these branches are engaged on a part time basis^[52], which makes their work vulnerable. This domain is also marked by other types of vulnerabilities – for example the Laws on Audio and Audiovisual Media Services and on Media do not contain provisions that explicitly guarantee access of regional and local media or to community media, to various media platforms which puts additional pressure on their sustainability. Besides, there are no allocated funds to subsidize local and regional media nor are there funds to subsidize community media.

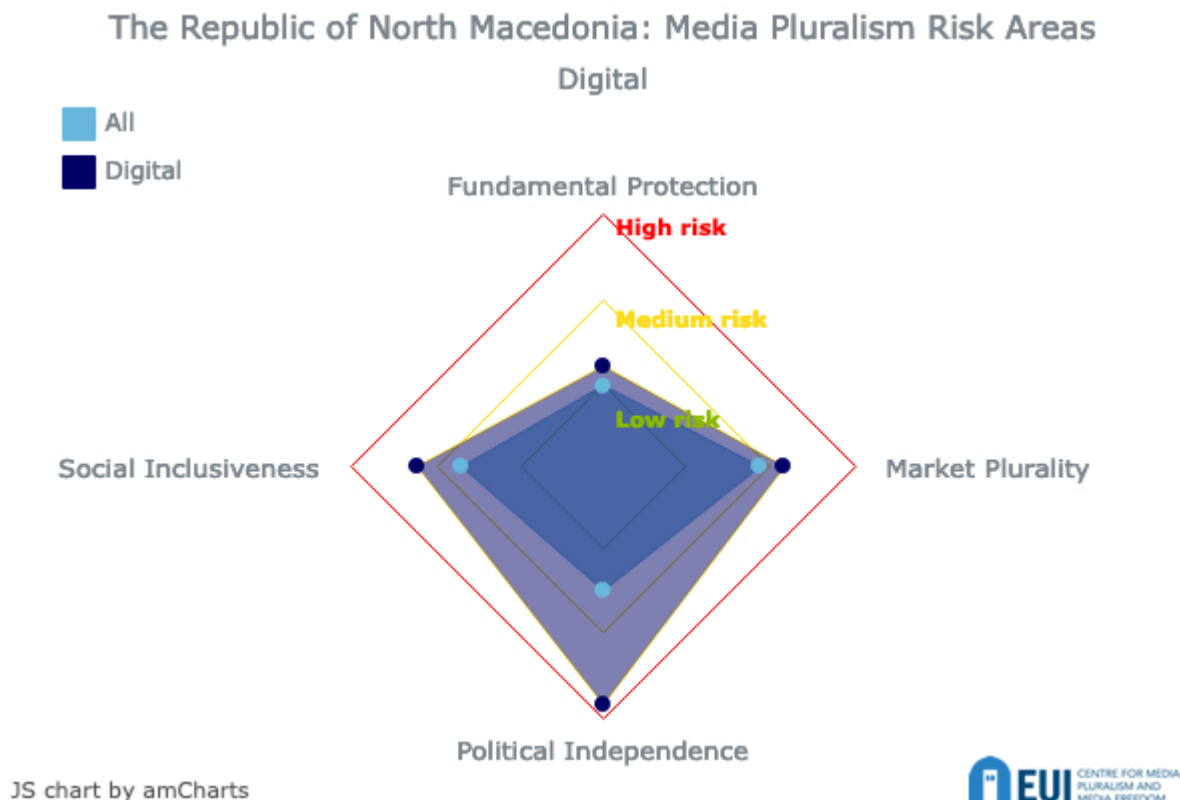
The **Access to media for women** indicator is marked with a relatively high risk of 68%. In the previous edition of the MPM, this risk was slightly lower at 61%. The increased risk estimation is mostly, all else being equal, due to the lower share of women among executives of Public Service Media (it is 20% in the 2021 reports)^[54], and the lower share of women among executives of private TV companies (it is 18% in the 2021 reports)^[55]. The shares in the 2020 reports (for 2019) were 25% and 32% respectively. There is no estimation as to whether these changes were an effect of COVID-19 crisis pressure to the media system. Overall, gender equality in the media sector has not been given enough attention neither in the public broadcasting service nor in the commercial audiovisual sector. There is no recent research data on the representation of women in the news and information programmes. The distribution of the presence of women with respect to types of newsrooms is also unequal – for example in a recent study commissioned by the regulator, there is an insignificant presence of women in sports newsrooms of private and public media. The expectation is that there is a far better representation of women in the current affair newsrooms^[56].

The state of **Media Literacy** still poses a high risk for pluralism in the Macedonian media environment. This indicator for 2021 poses a high risk of 68%, which is still slightly lower than in the 2020 estimation when it was 71%. This adjustment is mostly due to the, not insignificant, attempts by state institutions, media, the broadcast media regulator and the CSO sector alike, to work on programs to increase media literacy amidst

the younger population last year^[57]. However, these programs are at their infancy and there is no tangible proof for their future success or sustainability. Therefore, the assessment remains that there is still no comprehensive media literacy policy at state level; media literacy is still not included in the formal education process and there are no institutional measures aimed at improving the media and digital literacy skills among various segments of the population - the initiatives mentioned are mostly concerned with the younger age groups. The last available research data we have suggests that media and digital literacy skills among the population are at an extremely low level^[58].

The total estimated risk for the indicator **Protection against illegal and harmful speech** is 50% which is a slight improvement in comparison to the 2020 report when it was estimated at 63%. The decrease in the risk assessment does not imply an actual change in circumstances, but rather it is due to the fact that two additional variables were added in the estimation. The first, concerning the effectiveness of regulatory measures against disinformation poses a high risk. The second one, concerning the strength of civil society's push to fight disinformation, poses a low risk. Several CSO initiatives to combat disinformation and hate speech in the country^[59], are a tool to raise awareness but it has been widely acknowledged that a coordinated wider action by variety of state and non-state actors is necessary for visible effects. The spread of disinformation and other harmful content on social networks was still intense in connection to the pandemic. This presumably had consequences on populations' opinions especially concerning the need for vaccination. The legal framework for the prevention of hate speech is comprehensive, but there are many problems in its application in the online sphere, where hate speech and other harmful content is particularly widespread.

4. Pluralism in the online environment: assessment of the risks



The risks to media pluralism in the digital sphere critically affect the overall state of the media system in the Republic of North Macedonia. The development of this domain, as elsewhere in the world, is increasingly capturing diversity of audiences and users, but it has also exposed them to plethora of vulnerabilities – the proliferation of misinformation, disinformation, and harmful content, have not been met with audience’s reciprocal capability to judge and deconstruct. This in turn, has increased the risks of destabilisation of the entire political system in this small, but, politically, economically, and demographically complex society. So far, North Macedonia’s regulatory policies and (critically) its educational system have not created an appropriate response to these changes, and this past year has not seen improvements in this regard. Numerous but only partially effective activities of CSOs in the field of media literacy are insufficient to make a transformative push in legislation and practice to minimise risks.

Fundamental Protection. There has been some weakening in the assessment of the guarantees concerning the freedom of expression online in the past year due to the evaluation that ISPs and online platforms are only partially transparent concerning the filtering, removal or blocking of harmful content online^[60]. There have been no registered restrictive measures by the state in taking actions to filter, monitor, block or remove online content. A change in this area is the slight improvement in the average speed of broadband internet, even though the country is still low on the list^[61]. Most of the issues that were a concern in the last report are constant. The issue of freedom of expression online is not regulated by a separate law in North Macedonia. However, the constitutional guarantees^[62] and the relevant laws (media-related or otherwise) pertaining to rights and freedoms in the online sphere are in alignment with international standards. Legal mechanisms in case of violation of the freedom of expression on the internet are thus in place. Though, there are difficulties to assess the effectiveness of these mechanisms in practice because of the general lack of comprehensive methodology for monitoring and measuring the quality of judicial justice^[63]. The Law on Personal Data Protection, which was adopted in February 2020, is aligned with the

provisions of the General Data Protection Regulation, including the derogation aimed at ensuring the proper exercise of journalistic protection. The Law on Electronic Communications contains clear obligations for Electronic Telecommunications Operators and internet service providers (ISPs) in terms of data retention, and, in practice, there were no cases of interference with the right to private and family life or the right to freedom of expression. Regulatory safeguards regarding net neutrality are in place, and they are effectively implemented in practice by the ISPs. Risks in this domain come from the fact that the Directive (EU) 2016/680^[64] has still not been transposed into the national legislation^[65]; there is a persistent ineffectiveness of the institutions in addressing the cases of online harassment and hate speech against journalists - some cases of online threats against journalists have been registered in the past year, including online threats against women journalists^[66]. Finally, the fact that a significant share of households in the country does not have access to broadband internet at home constitutes a risk for this domain^[67].

Market Plurality. Digital news media are still not legally obliged to disclose information on their ownership structures. Attempts were made in 2013 to regulate the online information domain in general, but it was met with strong opposition, due to journalists' organisations' fear that the then ruling semi- authoritarian government would misuse legal instruments to hinder freedom of expression online. Self-regulatory mechanisms, are in place however, obliging more than 150 members of the voluntary Registry of Professional Online Media to publish such data on their web sites^[68]. Having said that, it's worth noting that many digital news media are not members of this Registry and do not publish ownership data^[69]. In consequence to lack of regulation, restrictions are not imposed on the concentration of ownership of digital media. There is another risk in this area originating from the lack of structural transparency mechanisms – reliable data collection systems on the revenues and audience concentration of the online media sector are not in place. As a result it is not possible to make a reliable estimation of the market share of top online media outlets as well as on cross-media concentration^[70]. The news online domain may still be considered a fragmented and weak, as much of the advertising revenue goes to global social networks and search engines^[72]. A risk in this area is also the fact that intermediaries (news aggregators and social networks) are the main locations where people access news online^[73], hence the news producers (online media) themselves are at risk to attract less revenues than news aggregators and social networks. In addition, and this aggravates the situation further, the competition and regulation policy are not developed to address the problem of unfair competition between different players in the new digital media ecosystem. There are no public support schemes for digital native news media in the country.

Political Independence. The overall risk for political independence of media in this year's report is estimated at 49%, while the digital related risks in this area score at high 91%. The vulnerabilities within the online domain of this area continue to pose a reason for future concern, having in mind the importance of this domain for future political communication and having in mind the deeply rooted clientelistic culture in the country. The currency of information disseminated through online news media, has already attracted some pressure for political control - there is a constant indication of media outlets being connected to political parties which is reflected on their content output^[74]. Legal provisions to prevent a conflict of interest between owners of digital native news media and politicians or party groups are not in place, which poses a visible risk. Not much has changed in terms of self-regulation in comparison to last years report - there are some initiatives in this respect, but as much as they are an extremely important and a positive movement, they are still largely insufficient^[75], which stabilises the estimation of risk in this domain at a medium level. The highest risk in this domain is presented in the legislation concerning political parties and elections. The Electoral Code contains some rules aimed at ensuring transparency of political advertising in digital native media outlets, but there are no explicit and clear provisions for political advertising on social platforms. Furthermore, even though political parties are obliged to keep and submit records on their campaign

spending in general, in practise they do not publish precise disaggregated data on campaign spending on online platforms^[76]. The Law does not contain any provisions related to the fulfilment of the PSM public service mission in the online sphere.

Social Inclusiveness. Vulnerabilities in this area spring from the low levels of media literacy among the population and from the ineffective and legislatively weak mechanism to tackle disinformation, misinformation and harmful content on internet. Media literacy in the overall population is at a low level, and this is especially true concerning the economically and socially deprived segments of society. The last known statistical data concerning levels of media literacy are from 2019. According to this data, the percentage of individuals who have basic or above basic digital skills in North Macedonia that year was 32%, while the percentage of individuals who had low overall digital skills was 50%^[77]. The most recent research study conducted at national level not surprisingly suggests, that the young population possess far greater digital skills and abilities than older groups in society^[78]. However, the results from the Census 2021 show a devastating trend of immigration of that young population, a process that deprives the aging nation from a potential to develop in this domain. Functional literacy skills are lacking in all age groups in North Macedonia. As a result, disinformation and varieties of harmful content are widely spread online – processes exacerbated by the COVID 19 crisis^[79]. The system has a limited efficacy in removing these contents from the internet – this includes a limited effectiveness of removing harmful content aimed against smaller minorities such as the Roma population, sexual minorities, gender minorities and women^[80]. North Macedonia has no special legislation aimed to prevent disinformation spread, and a plan introduced by the Government in 2019 met with some opposition by journalist’s organisations amidst concerns of hindrance of freedom of expression. Having said this, the CSO sector is increasingly active, but their push is frustratingly ineffective in the anti-disinformation fight^[81]. The proposed long overdue education reforms in terms of media literacy education have just begun^[82].

5. Conclusions

The improvement of the state of media pluralism in North Macedonia was evident immediately after the fall of its semi-authoritarian government back in 2017. An important focus of the new political constellation in Skopje was in fact to apply pressure on structures that hitherto infringed media freedoms and created clientelistic (financial) constraints - the 2020 report noted that. However, between 2019 and 2021 two main developments occurred: first, government structures shifted their attention away from systemic media reforms – finally disregarding them altogether and even attempting to themselves harness clientelistic media services, and second, the COVID - 19 crisis has had its impact on variety of economic and social sectors – the media sector included. These factors resulted in either a stalemate in some important areas of the domain of media pluralism, or in a slight deterioration in others, such as the domain of social inclusiveness, as this report demonstrates. With respect to these re-assessed risks, we propose the following general actions:

Fundamental Protection (32%)

- **Coordinated action must be taken by state and non-state actors to improve journalists' working status and to strengthen the autonomy of newsrooms.**
- **Relevant institutions should take measures to prevent online threats and harassment against journalists.**
- **State and non-state stakeholders should work on the development of anti-SLAPP legal framework.**

Market Plurality (62%)

- **State institutions should revise the rules on ownership concentration in order to address the detected risks.**
- **The audiovisual media regulator should continue examining the impact of various factors on the economic vitality and sustainability of audiovisual media sectors and adjusting policy measures accordingly.**
- **New competition and media policies should be developed to address the competition issues in the online media sector.**

Political Independence (49%)

- **Institutions should develop new solutions to the the provisions in the Electoral Code and other laws related to political advertising in the audiovisual media sector and address the absence of transparency of party-political advertising on the online platforms.**
- **Anticorruption related, state and non-state stakeholders should investigate clientelistic ties between power centers and media owners.**

- **To develop a participatory model of the public service and to ensure stability and independence in its funding.**

Social Inclusiveness (56%)

- **To design a comprehensive media literacy policy at state level that would incorporate the aspects of developing critical thinking skills as well as critical consciousness within the formal and non-formal education process and increasing critical awareness of various population groups that are vulnerable to disinformation and other harmful content spread on various platforms.**
- **The efficiency of the competent institutions for investigating and sanctioning extreme cases of hate speech, harassment and other harmful content online should be increased.**
- **To take measures that will ensure greater access to media by various vulnerable and marginalized groups.**

6. Notes

- [1] Compared to the data from the previous Census of 2002, the total resident population decreased by 185,834 persons, or 9.2%. Source: State Statistical Office. Available at: <https://popis2021.stat.gov.mk/default.aspx>
- [2] In the total resident population, there are 132,260 persons who are not registered, ie for whom the data are taken from administrative sources. The reason why these people are not listed is the boycott of the Census called by the main opposition political party VMRO-DPMNE and partly the fear of some citizens of the spread of the Covid 19 virus, although during the Census all precautions were taken.
- [3] World Bank, Western Balkans Regional Economic Report, No. 20, Fall 2021: Greening the Recovery, p.92. Available at: <https://openknowledge.worldbank.org/handle/10986/36402>
- [4] European Western Balkans, Transparency International 2021 CPI: Progress, stagnation and backsliding in the Western Balkan countries, January 27th, 2022. Available at: <https://europeanwesternbalkans.com/2022/01/27/transparency-international-2021-cpi-progress-stagnation-and-backsliding-in-the-western-balkan-countries/>
- [5] The Impact of New Media on the Public Opinion and on the Operation of Traditional media, Agency for Audio and Audiovisual Media Services, 2020, p. 8-9. Available in Macedonian language at: <https://resis.mk/attach/Vlijanieto-na-novite-mediumi-vrz-formiranjeto-na-javnoto-mislenje-2020.pdf>
- [6] The Association of Journalists documented five attacks in 2021, three of which were online threats against women journalists. According to journalists' association, the Public Prosecutor's Office did not take appropriate measures. In addition, during 2021, the Basic Civic Court in Skopje rejected a lawsuit filed by journalists who were reporting from the Parliament riots on 27th of April 2017. The journalists started a legal action against the state for violation of their rights to freedom of expression and they requested compensation for state's failure to guarantee security to the journalists on duty at the Parliament: Based on an Interview with Dragan Sekulovski, Association of Journalists, conducted on 11th January 2022.
- [7] The guarantees incorporated in Article 16 of the Constitution are also contained in Article 3 of the Law on Media (Official Journal of RNM No.184 26.12.2013) and in Article 2 of the Law on Audio and Audiovisual Media Services (Official Journal of RNM No.184 / 2013, 44/2014, 101/2014, 132/2014, 142.2016, 132/2017, 248/2018, 27/2019, 42/2020 and 77/2021.) Available at: <https://avmu.mk/закон-за-аудио-и-аудиовизуелни-медиум/>
- [8] In June 2021, the Center for Legal Research and Analyses published a study that concluded that there is a lack of “[...] clearly defined rules for monitoring and measuring the quality of judicial justice as well as lack of additional tools and data to monitor the outcome and reasons for appealing the decisions of the basic courts.” (p.242). Functional analysis of the basic courts in RNM, p.242. Available at: https://cpia.mk/wp-content/uploads/2021/11/ФУНКЦИОНАЛНА-АНАЛИЗА-ЗА-ОСНОВНИТЕ-СУДОВИ_web.pdf
- [9] Law on Free Access to Information of Public Character (Official Journal of RNM No. 101/2019) Available at: <https://aspi.mk/wp-content/uploads/2020/09/ЗАКОН-ЗА-СПИ-ПДФ.pdf>
- [10] In the course of 2021, the Center for Civil Communications, a think tank CSO, sent formal requests for free access to public information to various local and national institutions, on the same day and with the same request: the municipalities responded within 17 days on average (in 2020 that average was 24 days), and the ministries responded in 16 days on average (in 2020 their average was 26 days). 61% of the institutions responded within the legal deadline of 20 days, while 39% responded later than the legal deadline. Active Transparency Index 2021, p.5. Available at: <https://www.ccc.org.mk/images/stories/akt21.pdf>
- [11] According to data published by the State Commission for Prevention of Corruption (SCPC), in 2021,

this State Commission received only 8 reports from whistle-blowers on suspicion or knowledge of illegal or unlawful conduct in various institutions. On the other hand, the number of submitted reports from other individuals and legal entities related to the existence of corruption, abuse of public position and conflict of interest in 2021 was 704. Infographic SCPC 2021. Available at: <https://dksk.mk/wp-content/uploads/2021/12/DKSK-Infografik-2021-01-scaled.jpg>

- [12] The abbreviation SLAPP comes from the expression Strategic Lawsuits Against Public Participation and is used to denote the practice used by some powerful individuals to discourage whistleblowers, journalists, or other individuals from expressing their critical views on a variety of issues of public interest.
- [13] Law on Personal Data Protection (Official Journal of RNM No. 42/2020 and No. 294/2021) Available at: https://dzlp.mk/mk/domasni_propisi
- [14] In October 2021, the Independent Trade Union of Journalists and Media Workers conducted a survey among 150 journalists and media professionals concerning their working conditions during the COVID-19 pandemic: the survey showed that 42 journalists or other media workers lost their jobs, 62% said the pandemic had a negative effect on their mental health, 69% said their employer did not provide conditions for safe reporting during pandemic, almost as many stated that they were not insured in their workplace. In addition to taking care of their own health, journalists and media workers are also concerned about keeping their jobs and 74% of them do not think that the situation will change after the crisis. "Fear and anxiety is the price journalists pay for reporting on the COVID-19 pandemic.", December 2021. Available at: <https://ssnm.org.mk/komentari/страв-и-анксиозност-е-цената-која-нови>
- [15] Representatives of the Association of Journalists stated that in 2021, they registered 5 threats and attacks on journalists, three of which were threats against woman journalists, all addressed online. The association has information on many more threats, but the problem is that journalists are not encouraged to report them. Therefore, they consider this to be a major problem for journalists' freedom of expression. Interview with Milan Spirovski, representative of the Association of Journalists of Macedonia (12th, January 2022).
- [16] In terms of impunity, the situation has slightly improved compared to 2020. Namely, in 2021 the Basic Court of Radovish, a small town in North Macedonia, passed a verdict against a person who published a post with extreme hate speech against indefinite journalists on the Association of Journalists' Facebook wall. Although this verdict is not yet final, it is of great importance for journalists, because for the first time the relevant institutions (Ministry of Interior, Public Prosecutor's Office and the court) have efficiently identified and sanctioned an offence of this sort.
- [17] Law on Audio and Audiovisual media Services (Official Journal of RNM No.184 / 2013, 44/2014, 101/2014, 132/2014, 142.2016, 132/2017, 248/2018, 27/2019, 42/2020 and 77/2021.) Available at: <https://avmu.mk/закон-за-аудио-и-аудиовизуелни-медиум/>
- [18] In its Progress Report for 2021, the European Commission emphasized that "the Government continued to use its discretionary right in the distribution of state funds to the broadcasting sector, further decreasing the allocations for the public service broadcaster, media regulator and broadcasting public enterprise, contrary to the requirements introduced in the law on Audio and Audiovisual Media Services." COMMISSION STAFF WORKING DOCUMENT North Macedonia 2021 Report, p.80. Available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52021SC0294>
- [19] State Statistical Office, Usage of information and communication technologies in households and by individuals, 2021. Available at: https://www.stat.gov.mk/pdf/2021/8.1.21.38_mk.pdf
- [20] In 2021, the Central Registry has made the information on the real owners of the traditional and online media publicly accessible. A small fee is charged for the requested information per media outlet.

- [21] The first draft-version of the Law on Media from December 2013 also covered online media, but the journalistic and media community took the position that they should not be subject to media legislation due to the possibility for the Government to use the law to put pressure on critical online journalism. Today, online media are subject to strong self-regulation, a Register of Professional Media has been established and guidelines for ethical reporting of online media have been adopted which contain an obligation for transparency of the ownership of online media. In addition, the existing Law on Prevention of Money Laundering and Financing of Terrorism, obligates on transparency of ultimate owners of online media.
- [22] For example, at the television market, in 2020 there were 45 private TV stations plus the TV channels of the public broadcaster, and their total revenues were 2,230.07 million denars. The market share of the Top 4 TV stations amounted to a total of 1,740.37 million denars, which is 73,1% of the total revenues. On the other side, the audience share of the top 4 TV stations in 2020 was 47.9% (Source: Nielsen Audience Measurement). On the radio market, there are 68 radio stations, the total revenues in 2020 were 152.54 million denars, while the market share of the top 4 radio stations was 64.24 million denars, which is 42,1% of the total revenues in the sector. There are no measurements for the radio audience in the country.
- [23] This is elaborated in more details in the Chapter 4. Pluralism in the online environment: assessment of the risks.
- [24] According to a study conducted by the RESIS Institute for the needs of the media regulator, the estimation is "that of the total budget for digital marketing in the country, almost half is distributed among domestic online portals, while the other half flows out to Google and Facebook". The Impact of the new media on the formation of public opinion and on the operation of traditional media, May 2020. Available at: <https://resis.mk/attach/Vlijanieto-na-novite-mediumi-vrz-formiranjeto-na-javnoto-mislenje-2020.pdf>
- [25] Based on the market analysis for 2020, the regulator detected a constant downward trend in revenues from 2016 onwards. The data for 2021 is still not available as the regulator will have published its findings after the publishing of this report. Available at: <https://avmu.mk/wp-content/uploads/2021/09/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2020-година.pdf>
- [26] According to the estimations presented in the Study commissioned by the regulatory body, the online sector in 2018 was the second in terms of advertising revenues. Macedonian online media in 2018 achieved an increase in revenues of about 32% comparing to 2017, which indicates that this media sector is constantly growing. However, there are no new data since then to base a claim on the trends. Available at: <https://avmu.mk/wp-content/uploads/2020/06/ВЛИЈАНИЕТО-НА-НОВИТЕ-МЕДИУМИ-ВРЗ-ФОРМИРАЊЕТО-НА-ЈАВНОТО-МИСЛЕЊЕ.pdf>
- [27] For example, based on the market analysis for 2020, for the local TV sector the regulator also detected a constant downward trend in revenues from 2016 onwards. In 2020 the revenues decreased by 17,64% compared to 2019. Analysis of the audio and audiovisual media services market for 2020 - Agency for Audio and Audiovisual Media Services – 2021. Available at: <https://avmu.mk/wp-content/uploads/2021/09/Анализа-на-пазарот-на-аудио-и-аудиовизуелни-медиумски-услуги-за-2020-година.pdf>
- [28] A study commissioned by the regulator concludes that in 2020 the spread of the COVID-19 pandemic caused significant cuts in advertising budgets and that national television stations themselves stated that advertising revenues in 2020 had decreased by about 30% in relation to 2019. Study to determine the justification for announcing a public competition for granting a license for television broadcasting at the state level through digital terrestrial multiplex, December 2020. Available at: <https://avmu.mk/wp-content/uploads/2020/12/Studija-za-utvrduvanje-na-opravedanosta-za-objavuvanje-javen-konkurs-za-dozvola-za-TV-na-drzavno-nivo.pdf>

- [29] There is no precise data on the total number of employed journalists in the country, but according to the Agency for Audio and Audiovisual Media Services, the audiovisual sector alone employs about 1,061 journalists and editors, so together with those working for various print and online media, the total number is estimated to 1,300 journalists.
- [30] On December 29, 2021, the Government adopted a Decision on approving funds from the Budget for 2021 for the realization of the Support Program for the print media. According to the decision, 30 million denars will be distributed to 11 media companies that have met the conditions of the public call for support of expenses for printing and distribution. The program for support of the print media is implemented for the fourth year in a row.
- [31] In February 2021, two measures were adopted to provide support to media because of Covid-19 crisis: (1) 120 broadcasters were exempted by the media regulator from paying the license fee for 2021 (total amount of MKD 50 million), (2) terrestrial broadcasters were exempted from paying the fee for distribution of their programs through digital multiplex transmitters (the costs of the private operator of digital multiplex for 2021 were covered from the State budget).
- [32] Article 11 of the Law on Media (Official Journal of RNM No.184 26.12.2013) stipulates that the employment contract of the journalist may not be terminated, his/her salary may not be decreased or his/her position in the Editorial Board or Desk may not be changed, or his/her other rights determined in the Labour law may not be reduced due to the expression of his/her position, in case it is in accordance with the professional rules of journalism.
- [33] For example Article 10 of the Law on Media (Official Journal of RNM No.184 26.12.2013) provided that the media publisher was obliged to adopt a general act which would specifically regulate: the composition of the Editorial Board; rights and obligations of the Editor-in-Chief, the editors and the journalists; the mutual rights and obligations between the media publisher, the Editor-in-Chief, the editors and the journalists; the manner and procedure for appointing and dismissing the Editor-in-Chief, and other issues related to the operations of the medium. However, with the changes adopted in January 2014 (Official Journal of RNM No.13 from 23.01.2014) this provision was deleted.
- [34] See: Media Sector Hotspots in North Macedonia: Decisive Reforms Long Overdue, Snezana Trpevska & Igor Micevski – 2021. Available at: https://www.aspeninstitute.de/wp-content/uploads/2021_Aspen-Germany_Media-Freedom-in-the-Western-Balkans.pdf
- [35] For example, editors of formerly notoriously pro-governmental TV station are at present owners and editors of a print outlet.
- [36] The issue of political parallelism has been subject of several studies published over the past years. For example, see more at: Macedonian Institute for Media, Ownership and Financial Models of most Influential TV Channels in Macedonia, Croatia and Slovenia, 2017; Micevski, I. and Trpevska, S. 'What the Macedonian phone-tapping scandal tells us about clientelism in the media', in International Journal of Digital Television, 6(3), 2015; Trpevska, S., 'Country report for Macedonia', in Media Ownership and its Impact on Media Independence and Pluralism, Peace Institute, Ljubljana, 2004.
- [37] Article 10 of the Law on Media (Official Journal of RNM, No.184/2013 and 13/2014) stipulated that the media publisher was obliged to adopt a general act which will specifically regulate: the composition of the Editorial Board; the rights and obligations of the Editor-in-Chief, the editors and the journalists; the mutual rights and obligations between the media publisher, the Editor-in-Chief, the editors and the journalists; the manner and procedure for appointing and dismissing the Editor-in-Chief. In addition, Article 8 of the same Law stipulates that before the appointment or dismissal of the Editor-in-Chief the media publisher may ask the Editorial Board for opinion. However, with the changes adopted in January 2014 (Official Journal of RNM No.13 from 23.01.2014) the obligation under Article 10 was completely deleted.
- [38] Article 61 of the Law on Audio and Audiovisual Media Services (Official Journal of RNM No. 184/2013)

- stipulates that 'autonomy, independence and accountability of editors, journalists and other authors involved in the creation of programmes and editorial policy' is one of the basic principles in conducting broadcasting activity. Available at: <https://avmu.mk/закон-за-аудио-и-аудиовизуелни-медиум/>
- [39] The Complaints Commission of the Council for Media Ethics has received around 140 complaints in 2020, out of which around 10% were related to the violation of Article 14 of the Code which reads: 'Reporting on political processes, especially elections, must be impartial and balanced. The journalist must make professional distance from the political entities.'
- [40] Trpevska, S. & Micevski I., (2016) ASSESSMENT of the state of the media sector in Macedonia in relation to the Recommendations of the Senior Experts' Group on systemic Rule of Law issues relating to the communications interception revealed in spring 2015, Available at: <https://iks.edu.mk/attach/Policy-Brief-ASSESSMENT-of-the-state-of-the-media-sector-in-Macedonia.pdf>
- [41] From the financial reports of the political parties for the parliamentary elections in 2020 and for the local elections in 2021, published on the State Audit Office web site, it can be concluded that the political parties do not show separately the costs for political advertising online, but only as the total amount for renting advertising space paid to marketing agencies. Source: <https://dzt.mk/mk/izvestai-politicki-partii>
- [42] Based on the monitoring of the local elections coverage by the Agency for audio and Audiovisual media published in September of 2021 „...in the TV news bulletins, the First Program Service complied with the guidelines for professional journalists principles, covered by Articles 61 and 111 of the Law on Audio and Audiovisual Media Services, so it ensured a plurality of politically and expertly relevant opinions and views ... ". Available at: <https://avmu.mk/извештаи-од-мониторингот-на-медиумск/>
- [43] The very wording of the provisions of the Electoral Code confirms this conclusion. Namely, Article 75-f paragraph 1 states that "during the election campaign... broadcasters covering the elections may broadcast a total of nine minutes and thirty seconds... intended for paid political advertising, of which for the two largest political parties from the position... maximum four minutes..., for the two largest political parties in opposition... maximum four minutes..., for the other smaller political parties in the Assembly that do not have a parliamentary group... one minute, and for the political parties that are not represented in the Assembly... or candidates... thirty seconds." Available at: <https://avmu.mk/изборен-законик/>
- [44] (1) 120 broadcasters were exempted by the media regulator from paying the license fee for 2021 (total amount of MKD 50 million), (2) terrestrial broadcasters were exempted from paying the fee for distribution of their programs through digital multiplex transmitters (the costs of the private operator of digital multiplex for 2021 were covered from the State budget).
- [45] For example, the 13 members of the Program Council of the PSB are appointed by the Assembly upon a transparent competition and a public hearing of the candidates (Article 117). Article 119 determines detailed incompatibility rules for the members of the Program Council. The Council elects all other positions in the PSB.
- [46] For 2021, the Ministry of Information Society and Administration allocated 670.5 million denars (10.9 million euros) from the state Budget for the Macedonian Radio and Television. This is a decrease of 223.5 million denars (3.6 million euros), compared to 894 million denars (14.5 million euros) which were allocated for the public service media in 2020. Media Reforms Observatory, MRT with reduced 3.6 million euros in the draft budget for 2021, November 24th, 2020. Available at: <https://mediaobservatorium.mk/mrt-so-skrateni-3-6-milioni-evra-vo-predlog-budhetot-za-2021-godina/>
- [47] COMMISSION STAFF WORKING DOCUMENT North Macedonia 2021 Report Accompanying the document Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions 2021 Communication on EU Enlargement Policy. Available at: <https://eur-lex.europa.eu/legal->

- [48] Article 107 of the Law on Audio and Audiovisual Media Services provides that the national public broadcaster shall broadcast at least one television programme service in Macedonian, and one television programme service in the language spoken by at least 20% of the citizens that is different from Macedonian and the languages of the other non-majority communities; and shall broadcast at least two radio programme services in Macedonian, and one radio programme service in the language spoken by at least 20% of the citizens that is different from Macedonian and the languages of the other non-majority communities.
- [49] Even though in the past there were some private TV stations broadcasting in smaller minority languages e.g., Roma language, some of them have been closed due to unsustainability. There are at present a total of 44 private TV and 66 private radio stations in the country. Out of them 19 TV stations and 13 radio stations broadcast programs in some of the languages of the ethnic communities in the country. The Albanian ethnic community has the biggest access to the commercial audiovisual sector.
- [50] Article 26 of the Law on Audio and Audiovisual Media Services obliges the media regulator to undertake activities to encourage the audio or audiovisual media service providers to make their services accessible to hearing and visually impaired persons. Next, Article 61 stipulates that among the basic programming principles are also: fostering and development of humane and moral values of human beings, and protection of the privacy and dignity of each person; equality of freedoms and rights irrespective of the sex, race, national, ethnic or social background, political or religious convictions, wealth and social status of the individual and the citizen. In addition, The access of the vulnerable groups to the programs is a special obligation for the public service - the Macedonian Radio and Television, which is obliged to "create and broadcast programs for the entire public ...", and "... the programs should be intended for all segments of society without discrimination, while taking into account the specific social groups "(Article 110).
- [51] Article 110, paragraph 1, line 8 of the Law on Audio and Audiovisual Media Services obliges the Macedonian Radio and Television to provide information for the public on the regional and local characteristics and events in the Republic of Macedonia and enable open and free debate concerning all issues of public interest.
- [52] Koka, F., (2021) The situation with the correspondents of the Macedonian radio and television, Association of Journalists of Macedonia. Available at: <https://znm.org.mk/wp-content/uploads/2021/04/Состојба-со-дописниците-на-MPT.pdf>
- [53] Koka, F., (2021) The situation with the correspondents of the Macedonian radio and television, Association of Journalists of Macedonia. Available at: znm.org.mk
- [54] Employee structure in audio and audiovisual media industry in 2020 - Agency for Audio and Audiovisual Media Services – 2021. Available at: <https://avmu.mk/wp-content/uploads/2021/09/Struktura-na-vrabotenite-vo-2020-godina.pdf>
- [55] Ibid.
- [56] Micevski, I., Gender representation in the sports programs of national terrestrial broadcasters. Agency for Audio and Audiovisual Media services. Available at: <https://avmu.mk/wp-content/uploads/2022/05/Родот-во-спортската-програма-.pdf>
- [57] For example, the Agency for audio and audiovisual media services has throughout the past year increased activities within the Media Literacy Network for energizing and raising awareness of the projects of the CSO members of this Network. Also, the USAID has funded an IREX led project to increase awareness for media literacy in North Macedonia, and the Ministry of Education has pledged overall education reforms, including infusing the educational system with media literacy curricula.
- [58] According to the data published by Eurostat, the percentage of individuals who had basic or above

basic digital skills in North Macedonia was 32%, in 2019, while the percentage of individuals who had low overall digital skills was 50%. Available at:

https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=isoc_sk_dskl_i&lang=en

- [59] There are several online platforms and fact-checking services (<https://stopdezinformacii.mk/>, <http://proverkanafakti.mk/>, <https://vistinomer.mk/>, <https://truthmeter.mk/> <https://crithink.mk/>), numerous toolkits and guidelines aimed at improving the skills and capacity of the population to recognise disinformation etc.
- [60] YouTube or Facebook give only a brief explanation of why a video or other content has been blocked or removed, so they are transparent to certain extent. However, it is not known whether the news aggregators in the country remove any content because they don't publish any information on content removal. The same refers to online news portals (individual news outlets).
- [61] According to the Worldwide Broadband Speed League 2021, North Macedonia is ranked only slightly better than in 2020- at the 107th position, with a mean download speed of 15.38Mbps.
- [62] Article 16 of the Constitution also refers to and guarantees freedom of expression on internet.
- [63] Zarko Hadzi-Zafirov et al. (2021) Functional Analysis of the Basic Courts in the Republic of North Macedonia, p.242. Available at: https://cpia.mk/wp-content/uploads/2021/11/ФУНКЦИОНАЛНА-АНАЛИЗА-ЗА-ОСНОВНИТЕ-СУДОВИ_web.pdf
- [64] The full name of this act is: Directive (EU) 2016/680 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data by competent authorities for the purposes of prevention, investigation, detection or prosecution of criminal offences or the execution of criminal penalties, and on the free movement of such data, and repealing Council Framework Decision 2008/977/JHA.
- [65] The interviewed expert from the Personal Data Protection Agency stated that the relevant authorities will start the process of harmonization in the course of 2022. Interview with Emilija Ginovska, Public Relations Officer at the Personal Data Protection Agency, conducted by telephone on January 13rd, 2022.
- [66] The Association of Journalists registered five threats and attacks on journalists, of which 3 were threats against woman journalists, all addressed online. Source: <https://safejournalists.net/напади-врз-новинари/?lang=mk>
- [67] According to the data of the State Statistical Office, in the first quarter of 2021, 83.7% of the households had access to the Internet at home. The participation of households with broadband connection in the total number of households was 87.1% in 2021. Source: https://www.stat.gov.mk/pdf/2021/8.1.21.38_mk.pdf
- [68] The Council of Media Ethics has adopted in December 2020 the Guidelines for Ethical Reporting of Online Media which also contain obligations for the disclosure of ownership data. The Guidelines are available at: <https://semm.mk/en/news/press-releases/879-osce-mission-to-skopje-and-council-of-media-ethics-launch-first-ever-ethical-guidelines-for-online-media-in-north-macedonia>
- [69] This risk was overcome in 2021 with the establishment of the Registry of Real Owners at the Central Registry of RNM in which all legal entities, including the digital news media are obliged to submit data on their real owners.
- [70] IPSOS Dotmetrics is an audience measurement system established in 2020, when the system was in a test phase. But after the test period, during 2021, several online news media left the system and are not included in the measurement. As a result, the share of the Top4 online news media in 2021 has grown almost twice compared to the previous year, so it was not possible to make comparisons between 2020 and 2021.
- [71] In the online sector, there are more than 200 media outlets. According to some studies for 2019 the

total revenues in the online sector were estimated at 220 million denars, while the market share of the top 4 digital news was around 92.6 million denars, or 42,1% of the total revenues in the online sector. Source: The Impact of new media on the public opinion and on the operation of traditional media, Agency for Audio and Audiovisual Media Services, 2020. Available at:

- [72] In the online sector, there are more than 200 media outlets. According to some studies for 2019 the total revenues in the online sector were estimated at 220 million denars, while the market share of the top 4 digital news was around 92.6 million denars, or 42,1% of the total revenues in the online sector. Source: The Impact of new media on the public opinion and on the operation of traditional media, Agency for Audio and Audiovisual Media Services, 2020. Available at: <https://resis.mk/attach/Vlijanieto-na-novite-mediumi-vrz-formiranjeto-na-javnoto-mislenje-2020.pdf>
- [73] A telephone survey conducted in January 2020 by the RESIS Institute (for the study commissioned by the media regulator) found that television and the Internet, as sources of information, are equal in terms of frequency of use - both television and the Internet (the previous day) informed 76% of respondents. For the respondents who were informed on the Internet (76% in total): posts on social networks were the main source of information about domestic events (89%), news aggregators are the second online location where the audience goes to be informed (55%), and the websites of domestic online portals provide direct information for 48% of the respondents. For information, the portals of the domestic televisions are visited by 37% of the respondents included in the telephone survey. Source: The Impact of new media on the public opinion and on the operation of traditional media, Agency for Audio and Audiovisual Media Services, 2020. Available at: <https://resis.mk/attach/Vlijanieto-na-novite-mediumi-vrz-formiranjeto-na-javnoto-mislenje-2020.pdf>
- [74] A high risk here continues to pose a problem in 2021 because several analyses and debates have shown that online media is under the strongest political influence, there are even direct links between political parties and some online media outlets. The most prominent example is the group of online media related to the opposition VMRO-DPMNE (Kurir, Republika, Infomax, Leader, Netpress, Express.MK, etc.). The Political and Economic Basis of Media and Communication Models Spreading Disinformation and Hate Speech, Macedonian Institute for Media, 2020. Available at: <https://mim.org.mk/attachments/article/1231/Resilience-research-publication-1-MK-ENG.pdf>
- [75] The Code of Journalists contains provisions according to which the distance from political actors is binding on journalists, but this standard is often violated, especially by online media. The Council of Media Ethics and the Association of Journalists have made efforts to strengthen the implementation of ethical and professional standards in the online media, which is how the Register of Professional Media was established two years ago, that in 2021 had about 150 members. Also, Guidelines for ethical reporting of online media were adopted in December 2020 which contain detailed explanations on how journalists should apply the basic ethical standards in the online environment.
- [76] The Election Code contains a separate chapter on financing the election campaign and transparency of campaign spending (articles 83-87). All political contenders are obliged to keep records and to submit reports with accompanying documentation to the State Electoral Commission, the State Audit Office, and the State Commission for Prevention of Corruption. In the financial reports of the political parties for the local elections in 2021, published on the State Audit Office web site, political parties have not reported separately about funds spent for political advertising on social networks. Source: <https://dzt.mk/mk/izvestai-politicki-partii>
- [77] Eurostat Available at: https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=isoc_sk_dskl_i&lang=en
- [78] Mapping the levels of media literacy in the Republic of North Macedonia, A research study conducted in September 2019 for the Agency for Audio and Audiovisual Media Services by RESIS Institute. Available at: <https://resis.mk/attach/mapiranje-na-nivoata-na-mediumska-pismenost-2019.pdf>

- [79] Media Literacy Index 2021 Double Trouble: Resilience to Fake News at the Time of Covid-19 Infodemic - Open Society Institute Sofia – 2021 Available at: https://osis.bg/wp-content/uploads/2021/03/MediaLiteracyIndex2021_ENG.pdf
- [80] Having said this - it has to be noted that in early 2021 a high profile case of harmful content on internet - the so called Javna soba scandal - was effectively resolved in the courts. Javna soba was a web site that spread intimate nude photos of Macedonian citizens mostly women, as a way of entertainment and sexual revenge.
- [81] Several ongoing projects in the country are aimed at fighting against disinformation spread. A Media Literacy Network is operational (www.mediumskapismenost.mk) consisting of more than 50 members (CSOs, high-education institutions, research institutes, public institutions, private entities etc.) that run public campaigns to raise the level of awareness within the population. There are also several online platforms and fact-checking services (<https://stopdezinformacii.mk/>, <http://proverkanafakti.mk/>, <https://crithink.mk/>), initiative for including media literacy subject in the formal education, numerous toolkits and guidelines for improving the skills and capacity of the population to recognize disinformation etc.
- [82] Ministry of Education and Science, in cooperation with the non-governmental sector (Macedonian Institute for Media), in 2019 announced educational reforms in the country within which media literacy is planned to be an integral part of the formal curriculum in primary and secondary education. In 2021 there is some progress compared to last year. The program for introduction of topics for media literacy in the 1st and 4th grade in primary education has just started. In addition, work has begun on a program to introduce media literacy in the 2nd and 5th grade of primary education. Interview with Vesna Nikodinovska, media expert from the Macedonian Institute for Media, conducted on January 12th, 2022.

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ANNEXE I. COUNTRY TEAM

First name	Last name	Position	Institution	MPM2022 CT Leader
<i>Igor</i>	<i>Micevski</i>	<i>Researcher</i>	<i>Research Institute on Social Development - RESIS</i>	
<i>Snezana</i>	<i>Trpevska</i>	<i>President</i>	<i>Research Institute on Social Development - RESIS</i>	X

ANNEXE II. GROUP OF EXPERTS

The Group of Experts is composed of specialists with a substantial knowledge and recognized experience in the field of media. The role of the Group of Experts was to review the answers of the country team to 16 variables out of the 200 that make up the MPM2022. Consulting the point of view of recognized experts was aimed at maximizing the objectivity of the replies given to variables whose evaluation could be considered as being subjective, and, therefore, to ensure the accuracy of the final results of the MPM. However, it is important to highlight that the final country report does not necessarily reflect the individual views of the experts who participated. It only represents the views of the national country team that carried out the data collection and authored the report.

First name	Last name	Position	Institution
<i>Vesna</i>	<i>Nikodinovska</i>	<i>Academic/NGO researcher</i>	<i>Macedonian Institute for Media</i>
<i>Marina</i>	<i>Tuneva</i>	<i>Representative of a publisher association</i>	<i>Council of Media Ethics</i>
<i>Dragan</i>	<i>Sekulovski</i>	<i>Representative of a journalist association</i>	<i>Association of Journalists of Macedonia</i>
<i>Emilija</i>	<i>Janevska</i>	<i>Representative of media regulator</i>	<i>Agency for Audio and Audiovisual Media Services</i>
<i>Darko</i>	<i>Duridanski</i>	<i>Representative of trade union of journalists</i>	<i>Trade Union of Journalists and Media Workers</i>
<i>Blagoj</i>	<i>Hristov</i>	<i>Representative of an Internet Service Provider</i>	<i>Macedonian Telecom</i>

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