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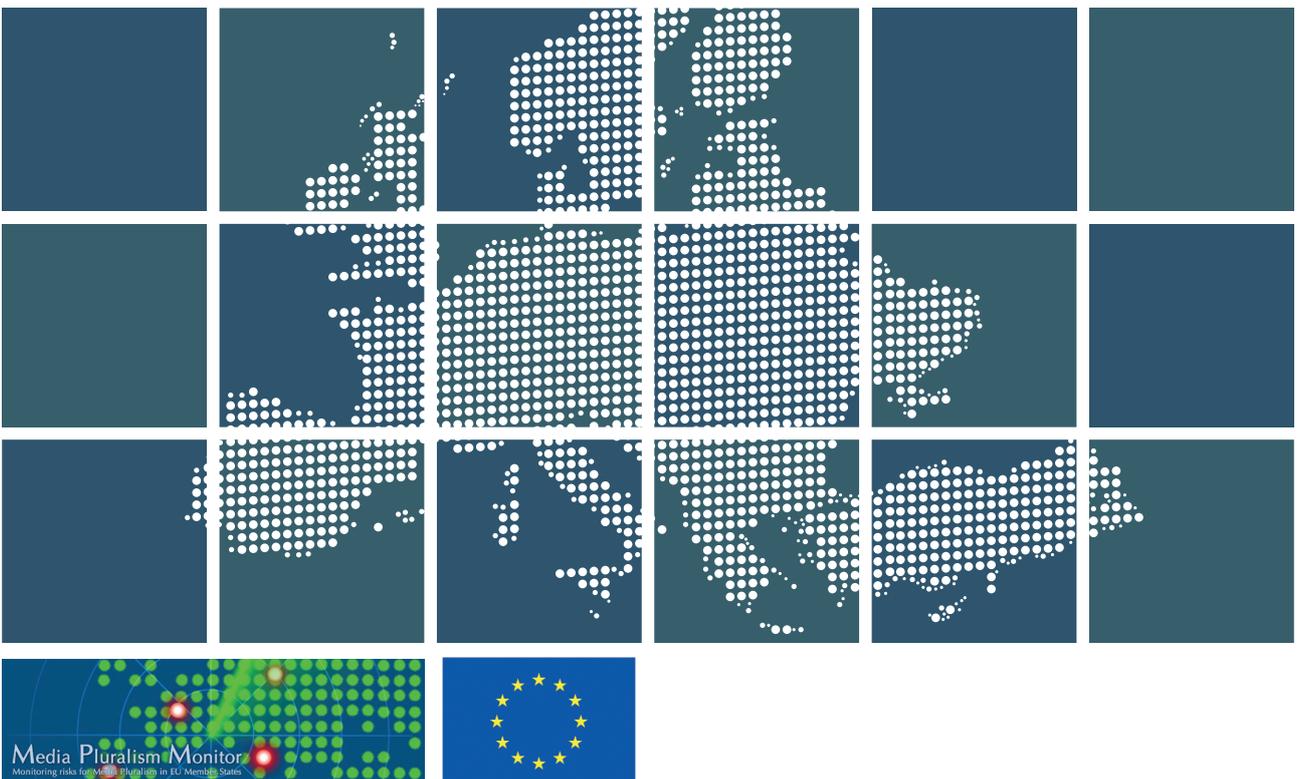
**CMPF**  
Centre for Media Pluralism and Media Freedom

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# Monitoring Media Pluralism in Europe: Application of the Media Pluralism Monitor 2017 in the European Union, FYROM, Serbia & Turkey

## Country Report: Former Yugoslav Republic of Macedonia

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# 1. ABOUT THE PROJECT

## 1.1 OVERVIEW OF THE PROJECT

The Media Pluralism Monitor (MPM) is a research tool that was designed to identify potential risks to media pluralism in the Member States of the European Union. This narrative report has been produced within the framework of the second EU-wide implementation of the MPM, carried out in 2017. The implementation was conducted in 28 EU Member States, Serbia, Former Yugoslav Republic of Macedonia (FYRoM) and Turkey with the support of a grant awarded by the European Union to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute.

## 1.2 METHODOLOGICAL NOTE

The CMPF cooperated with experienced, independent national researchers to carry out the data collection and to author the narrative reports, except in the cases of Malta and Italy where data collection was carried out centrally by the CMPF team. The research is based on a standardised questionnaire and apposite guidelines that were developed by the CMPF. The data collection was carried out between June and December 2017.

In Macedonia, the CMPF partnered with Snezana Trpevska, Igor Micevski and Gjorgi Mitrevski, from the Research Institute on Social Development (RESIS) in Skopje, who conducted the data collection, annotated the variables in the questionnaire and interviewed experts. The scores assessing the risks for media pluralism were provided by the CMPF and calculated according to the algorithm developed by the Centre itself. The national report was reviewed by 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).

To gather the voices of multiple stakeholders, the Macedonian team organized a stakeholder meeting, on May 28th in Skopje. Summary of this meeting and more detailed explanations are given in the Annexe III.

Risks to media pluralism are examined in four main thematic areas, which are considered to capture the main areas of risk for media pluralism and media freedom: Basic 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 Figure 1 below).

Basic Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political control over media outlets	Access to media for minorities
Protection of right to information	Media ownership concentration (horizontal)	Editorial autonomy	Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Cross-media concentration of ownership and competition enforcement	Media and democratic electoral process	Access to media for people with disabilities
Independence and effectiveness of the media authority	Commercial & owner influence over editorial content	State regulation of resources and support to media sector	Access to media for women
Universal reach of traditional media and access to the Internet	Media viability	Independence of PSM governance and funding	Media literacy



The results for each domain and indicator are presented on a scale from 0 to 100%. Scores between 0 and 33% are considered low risk, 34 to 66% are medium risk, while those between 67 and 100% are high risk. On the level of indicators, scores of 0 were rated 3% and scores of 100 were rated 97% by default, to avoid an assessment of a total absence or certainty of risk. For more information on the MPM methodology, see the CMPF report “Monitoring Media Pluralism in Europe: Application of the Media Pluralism Monitor 2016 in EU-28, Montenegro and Turkey”, <http://cadmus.eui.eu/handle/1814/46786>

**Disclaimer:** The content of the report does not necessarily reflect the views of the CMPF or the EC, but 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, the MPM2017 scores may not be fully comparable with those of MPM2016. For more details, see the CMPF report on MPM2017, which will soon be available on <http://cmpf.eui.eu/media-pluralism-monitor/>



## 2. INTRODUCTION

The Republic of Macedonia is a state in the centre of the Balkan Peninsula, bordering Greece, Bulgaria, Serbia, Kosovo and Albania. It gained its independence in 1991 following the collapse of former Socialist Federal Republic of Yugoslavia where, since its formation in 1945, it had a status of a federal republic. Macedonia has little over 2 million inhabitants. It is an ethnically heterogeneous country. Apart from Macedonians who comprise the majority of the population (65%) it has six recognised non-majority ethnic communities: Albanians (25%), Turks (3.8), Roma (2.7%), Serbs (1.8%), Bosniaks (0.84%) and Vlachs (0.5%).

Macedonia is a parliamentary democracy with strong inclinations, in its recent history, towards state capture, clientelism and ethno-politics. There are two main political parties on the political scene: VMRO-DPMNE which is the right-wing populist political party with a strong ethnic-Macedonian nationalist base and SDSM, comprised of the center-left Social Democrats. On the political landscape there are also smaller parties of the non-majority ethnic communities with the Democratic Union for Integration (DUI) being the strongest party of ethnic Albanians – it is a party that participated in almost all successive governments since the Macedonian conflict of 2001. Since mid-2017, a coalition government comprised of SDSM and DUI is in place in Skopje. It was formed after a lengthy political crisis which ended the 11 years long semi-authoritarian rule of VMRO-DPMNE and DUI.

In congruence with the characteristics of the political system, the media system in Macedonia is prone to political influence and clientelism, as a result of which Macedonia especially until the end of 2016 had one of the most apparent forms of media capture of Southeast Europe: the Public Service Media in the country were subject to financial and political pressures, the regulatory authority (Agency for Audio and Audio-Visual Media Services) was under political control, the private media were subjected to a strong government dependency by means of state advertising schemes and a large portion of the journalistic community, either willingly or by means of direct pressures, conformed with the will of the ruling political structure.

The new Social Democrats led government in 2017 had destabilised the previous system of dependencies. It has opened a debate concerning the changes of the relevant laws in the declared direction of de-politicization of the media sectors, it has changed the funding scheme of the PSM, and it has pledged to free the regulator from political pressures. However, it was still unclear in 2017 whether the new government will deliver on its pledges, having in mind that the reforms were moving at an extremely slow pace and that the old structures were still in place in the political system and in the media institutions. In addition, there has been severe criticism on the transparency of the legislative reforms undertaken so far and the real intention of the Government to start thorough reforms of the entire media system.



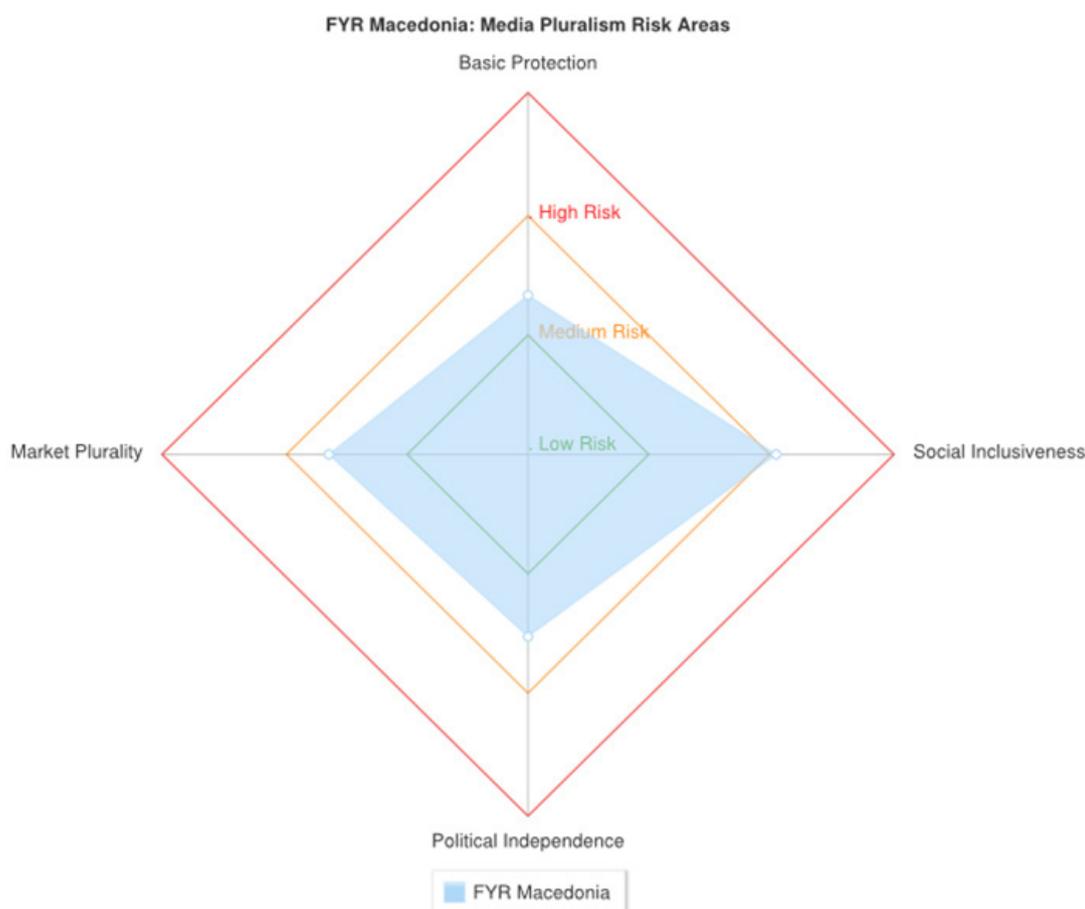
# 3. RESULTS FROM THE DATA COLLECTION: ASSESSMENT OF THE RISKS TO MEDIA PLURALISM

Media Pluralism in Macedonia faces some challenges. Over the past decades, legislation has alternately been changed in order, at least declaratively, to increase media independence, inclusiveness and plurality, but the result of its implementation was the gradual deterioration of the media system. Especially prior to 2016, Macedonia had a captured media system, with a strong political control on media content, engineered through the established political and financial interdependences between power holders, media owners and managing structures in the media. The collapse of the previous rule brought about a period of both uncertainty and a promise of great systemic changes. These changes have brought about a slightly improved assessment of the risks for most indicators of the Media Pluralism Monitor.

There is a medium risk for the basic protection of journalists and of the regulatory environment of the media, but still more needs to be done concerning the protection and the improvement of the socio-economic status and safety of journalists, the financial stability and transformation of the PSM and the independence and effectiveness of the regulator.

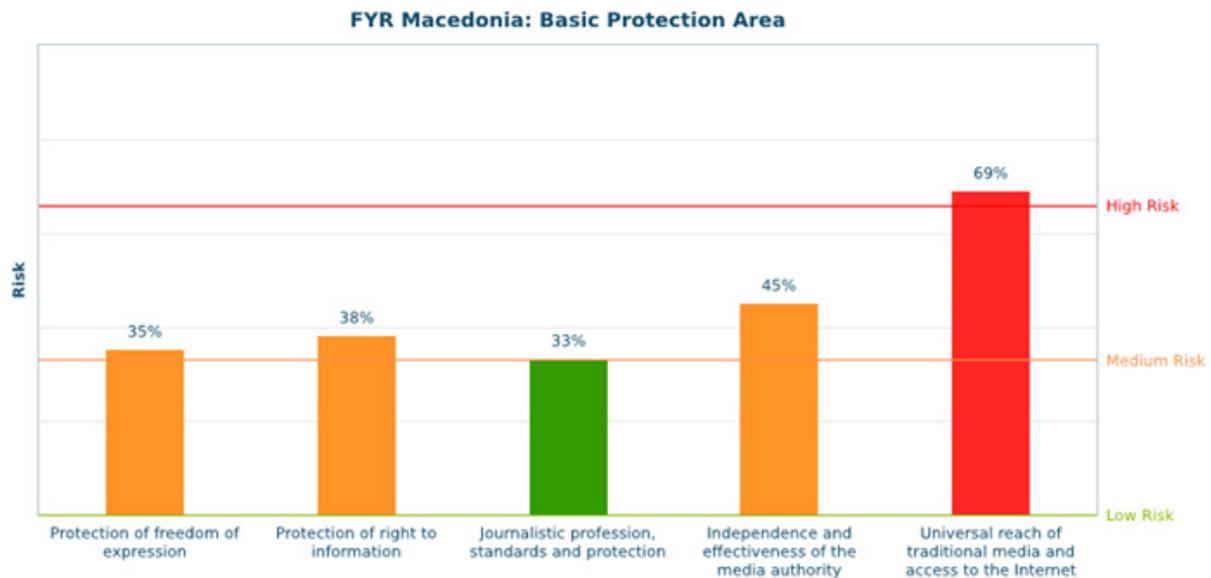
Market plurality and political independence of media are also assessed with a medium risk, with an important remark that the country is still struggling to cut the clientelistic ties between political actors and the media, to ensure financial and political independence of the PSM and to find appropriate solutions to safeguard political pluralism while ensuring sustainability of private media on the highly fragmented media market.

The situation is in even greater predicament when it comes to social inclusiveness of the media system, which is at a high risk (69%) – access to media for people with disabilities, women and marginalized communities, and also the poor state of media literacy, are systemic problems that need to be addressed urgently. The visibly improved political environment in the country, make for a greater likelihood that these issues will be on the top of the political agenda for the 2018 election.



### 3.1 BASIC PROTECTION (44% - MEDIUM RISK)

The Basic 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 indicator on protection of freedom of expression scores a medium risk (35%).** International standards on basic protection of freedom of expression have been incorporated in the national legal system with explicit constitutional guarantees. Even though defamation has been decriminalised, some provisions in the Law on Civil Liability for Defamation and Insult and the Criminal Code are not harmonised with the case law of the European Court of Human Rights, which increases the risk of creating a “chilling effect” for journalists. Widespread state induced violations of freedom of expression reached peak towards the end of the rule of the nationalist-populist government, but the new Government elected in April 2017 announced a change in this tendency.

**There is also a medium risk (38%) for the protection of the right to information.** Constitutional guarantees are in place for the protection of these rights and the Law on Free Access to Public Information is generally harmonized with the basic principles enshrined in the international law. The implementation of these provisions is however, poor, as the public administration tends often to deny access to information that should be open to the public. The Law on Protection of Whistle-blowers has been instated in 2015, but again the public sector lags behind with its implementation.

**The indicator on journalistic profession, standards and protection scores just below the medium risk threshold with 33%,** but in reality journalists in Macedonia still work in precarious conditions and do not feel sufficiently protected from pressures and impunity. Although, the number of reported cases on attacks on journalists in 2017 was lower than in the previous years, impunity persists - none of the court cases concerning violence against journalists from previous years have been resolved<sup>1</sup>. The relatively low risk of this indicator steams predominantly from the legally defined guarantees for journalistic freedoms: access to journalistic profession is not restricted as there are no legal provisions requiring from journalists to be registered or licensed by the state; protection of journalists’ sources is guaranteed in the Constitution and in the relevant Media Law and journalists are represented by a journalists’ association and a union.

**The indicator on the independence and effectiveness of the media authority presents a medium risk (45%).** The Law on Audio and Audio Visual Media Services provides a range of safeguards for its independence. In practice however, in the past decade political power has managed to bypass procedures and politically colonise the regulatory

<sup>1</sup> In effect the risk concerning this indicator would have been higher if one takes into consideration the incidents that happened in the Parliament on the 27<sup>th</sup> April 2017. On that day, in the process of the vote for the inauguration of the new government, supporters of the previous regime stormed the building and attacked the MPs. The journalists who were reporting from the location were put in great physical danger and their right to report was restricted by the mob.

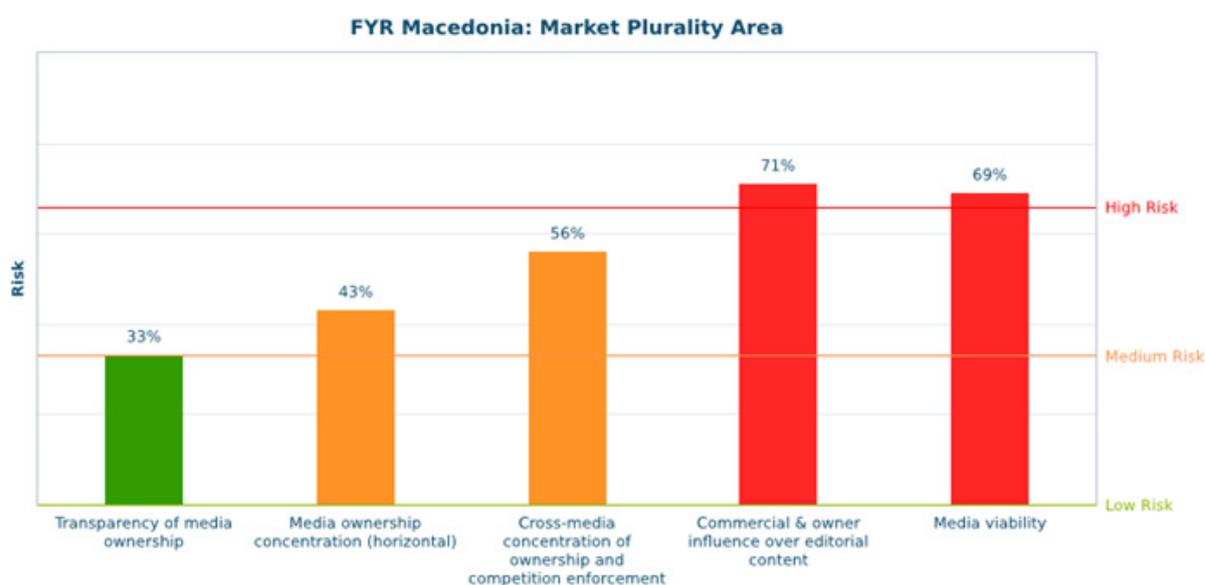


body so the procedures provisioned by Law have not been effective in limiting the risk of political or economic influence. Still, the authority acted more independently in 2016 and 2017, in the course of the collapse of the previous populist regime. Since the abolishment of the broadcasting in September 2017, procedures for allocation of budgetary resources for the media authority have not been transparent and objective which tends to create organisational dependencies.

**The indicator on the universal reach of traditional media and access to internet is at high risk (69%).** Some regulatory safeguards regarding net neutrality are in place - the Law on Electronic Communications which stipulates that the ISPs are obliged to secure access and are prohibited from degrading or blocking traffic, except under clearly defined circumstances. Internet operators are also subject to strengthened transparency obligations. In addition, the Law on Audio and Audio Visual Media Services guarantees universal coverage of the Public Service Media which enables almost entire population to have access to by public TV and radio channels. According to Eurostat, in 2016 only about a half of the households in the country were covered by broadband internet of at least 30Mbps and the average connection speed is 13 MBps.<sup>2</sup>

### 3.2 MARKET PLURALITY (54% - MEDIUM RISK)

The Market Plurality indicators examine the existence and effectiveness of the implementation of transparency and disclosure provisions with regard to media ownership. In addition, they assess the existence and effectiveness of regulatory safeguards to prevent horizontal and cross-media concentration of ownership and the role of competition enforcement and State aid control in protecting media pluralism. Moreover, they seek to evaluate the viability of the media market under examination as well as whether and if so, to what extent commercial forces, including media owners and advertisers, influence editorial decision-making.



**Transparency of media ownership indicator scored just below medium risk at 33%.** Article 15 of the Media Law contains explicit provisions requiring the disclosure of the ownership structure details of media organizations in the audiovisual and print media sectors, both to public bodies and directly to the public. This Law prescribes that the information on media ownership is published yearly by media outlets and that noncompliance with these provisions will be sanctioned by the media authority with corresponding fines. The main problem in this area is the fact that the relevant legislation comes short in its requirements for the disclosure of information about the ultimate (hidden) owners of media outlets, which in effect results in lack of transparency in this area.

**The indicator on the horizontal media ownership concentration scores a medium risk (43%).** The Law on Audio and Audiovisual Media Services contains precise limitations to prevent a high degree of horizontal concentration of ownership in the sector and the media regulatory authority has the oversight capabilities and the power to impose

<sup>2</sup> It is important to highlight that recent data published by the State Statistical Office shows that the participation of households with broadband connection was 67.1% in the first quarter of 2017. See: [http://www.stat.gov.mk/PrikaziSoopstenie\\_en.aspx?rbtxt=77](http://www.stat.gov.mk/PrikaziSoopstenie_en.aspx?rbtxt=77)



sanctions for non-compliance. Nevertheless, in the past several years, the former ruling party was able to exert control on several regional TV broadcasters through few unknown persons who bought these stations. Top four media owners in the audio-visual sector have 64% of the market share.

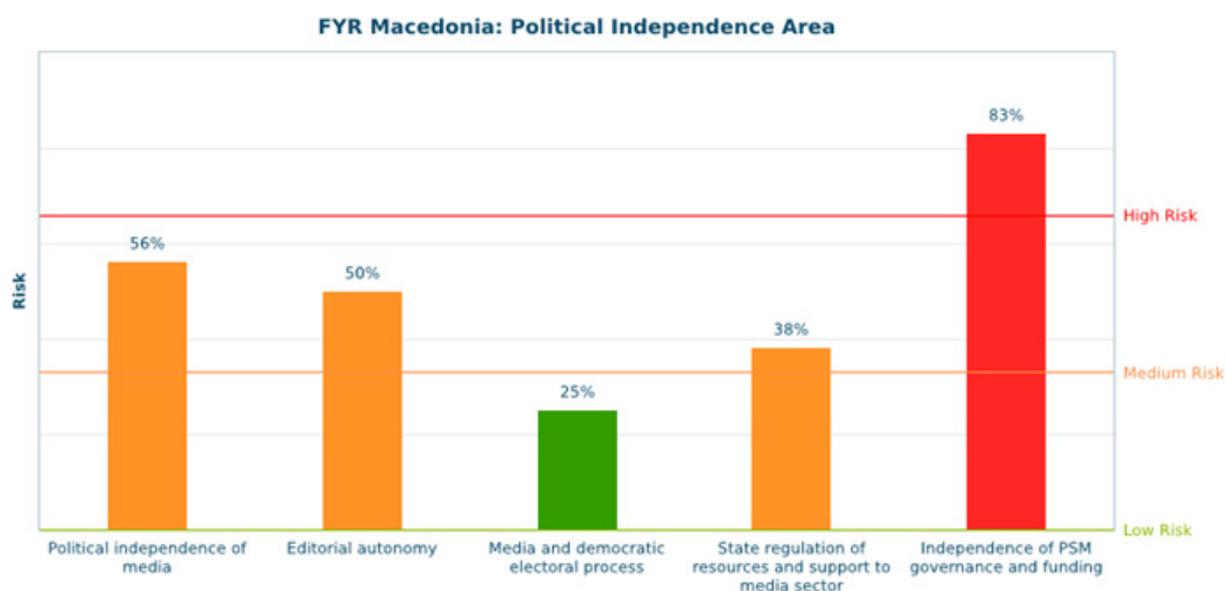
**The indicator on cross-media concentration of ownership and competition enforcement scores a medium risk (56%).** The Law on AVMS regulates ownership concentration between broadcasting and daily newspapers and news agencies, but it does not stipulate an explicit limitation to concentration between television and radio sectors. In addition, though cross-media concentration can be prevented with the Competition Law, this in practice is not the case as the Competition Authority has rarely considered competition issues in the media sector. There are no specific provisions in the Law related to obligations of the public broadcaster to keep separate accounting of the public and commercial revenues.

**The indicator on the commercial and owner influence over editorial content scores a high risk (71%).** Mechanisms granting social protection to journalists in case of changes of ownership or shifts in the editorial line of reporting are not in place and there are no legal safeguards against the influence of commercial actors in the appointments and dismissals of editors-in-chief. Macedonia's relevant legislation does not have safeguards against advertorials. There are provisions both in the relevant laws and in the self-regulatory documents that proscribe autonomy, independence and accountability of editors, journalists and other actors involved in the news production process.

**The media viability indicator scores a high risk (69%).** The total revenues in the audio-visual sector have decreased in 2016 in comparison to the previous year which to a great extent is due to the measures taken in order to stop the money flow from the party captured state to the obedient media. A similar decrease is witnessed in the print media, however additional factors were at play in that sector – the rise of the internet for example resulted in a decreased demand for print by the audience. This resulted in the closure of several of the formerly key influential newspapers in the country. Even though the Law on AVMS proscribes the circumstances under which funds are to be allocated for the support for domestic audio-visual production of national TV broadcasters, this mechanism was criticized as a risk for influence over the editorial policy. In addition, there are no viable initiatives aimed at developing alternative sources of revenue for the media sectors. Several online media are funded by foreign donors, but they couldn't find sufficient local sources to become self-sustainable.

### 3.3 POLITICAL INDEPENDENCE (50% - MEDIUM RISK)

The Political Independence indicators assess the existence and effectiveness of regulatory safeguards against political bias and political control over the media outlets, news agencies and distribution networks. They are also concerned with the existence and effectiveness of self-regulation in ensuring editorial independence. Moreover, they seek to evaluate the influence of the State (and, more generally, of political power) over the functioning of the media market and the independence of public service media.



**The indicator on the political independence of the media scores a medium risk (56%).** The relevant laws prescribe strict rules concerning conflict of interest between owners of audiovisual media and the political parties. In effect, however, the past decade has seen one of the most explicit cases of media capture in the Western Balkans, with most of the audiovisual media under strong political influence of ruling political parties. An effective method of this media capture was the so called ‘state advertising’, hidden behind public and electoral campaigns. The owners of the biggest and most influential TV stations have been political figures close to the hitherto ruling party. In the first half of 2017 three daily newspapers were closed - owned by individuals also close to VMRO-DPMNE.

The indicator on the editorial autonomy scores a medium risk (50%). Though Article 8 of the Law on Media stipulates the paramount value of editorial independence, in effect all types of media organisations were at high risk of political interference in editorial policy, over the timespan of the rule of the previous nationalist-populist government. This was explicitly visible in the media published news content of these media organisations, which was documented by successive relevant media monitoring reports<sup>3</sup>. Since the political change in 2017, there has been a visible relaxation of the political influence over the editorial autonomy.

**The indicator on the media and the democratic electoral process in 2017 scores a low risk (25%)** which seems a bit contradictory to the assessment of the previous two indicators. This assessment is a result of two factors: Firstly, the legal provisions are mostly aligned with the international standards for protecting political pluralism during election periods, and these counts both for PSM and the private media – article 110 of the Law on AVMS and article 76-a of the Electoral code provide guarantees that, however, have not been successfully implemented in the past years. Secondly, the political processes of 2016 and 2017 brought new impetus for improvement of the actual role of media in elections imposed by internal (NGOs, experts) and external (EU) pressures for a reform, whereas the decade before was marked by an extremely high risk for the position of the media in elections.

**The indicator on state regulation of resources and support to media sector scores a medium risk (38%),** and is measured through the following variables: the presence of rules on spectrum allocation, direct and indirect media subsidies and state advertising in the media. There are fair and transparent rules on spectrum allocation and they are effectively implemented. In Macedonia, media legislation has never envisaged state subsidies for different media, while state advertising has been widely used by the Government in the period from 2008 until 2015 as a cover for de facto ensuring political obedience of the media. In 2017 there was no state advertising in the media allocated from the state budget, but several municipalities and public enterprises on local level continued allocating funds from their budgets to some of the local TV stations which were considered as politically close the local politicians.

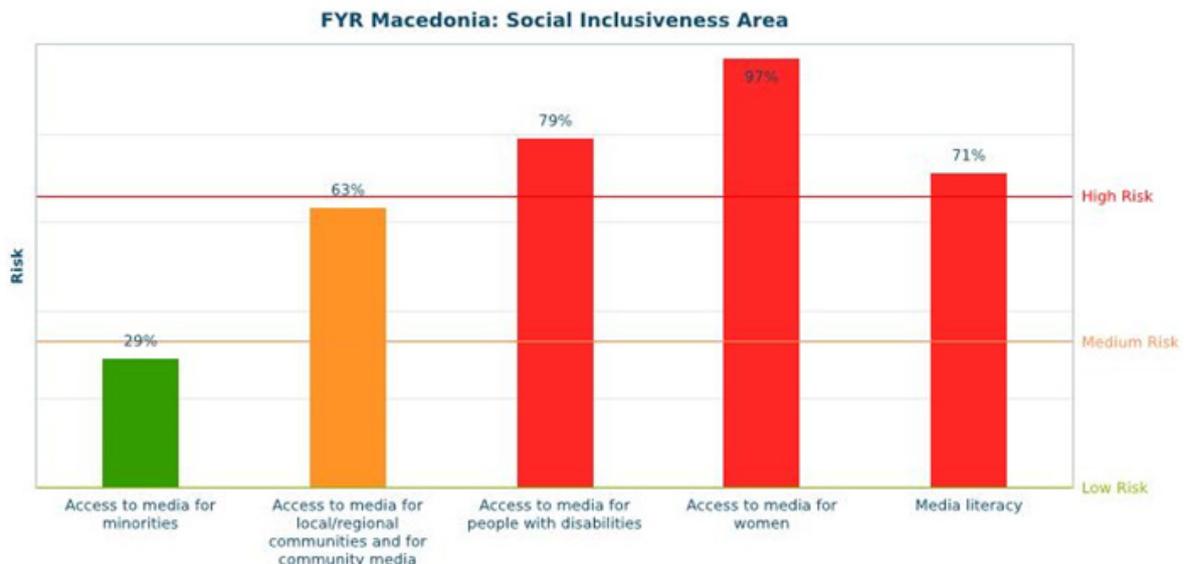
**The indicator on the independence of PSM governance and funding scores a high risk (83%).** The Law only partially provides fair and transparent appointment procedure for the Council of MRT. The actual independence of its governing bodies is consequently not satisfactory - in the past two decades, almost all high positions in the public broadcaster were politically influenced. The Law is more precise when it comes to the transparency of appointment of the Director General of the PSM (Article 130), but in effect, there has also been a high political influence over the appointments of directors general. The funding of the PSM has always been used as a threat by successive governments for the independence of the broadcaster. With the new adjustments of the funding scheme, adopted in September 2017, the public broadcasting tax was abolished as a main source and the PSB will be funded from the state budget. There has been a lot of criticism about whether this funding model will provide sustainability, autonomy and independence of MRT in the future.

### 3.4 SOCIAL INCLUSIVENESS (68% - HIGH RISK)

The Social Inclusiveness indicators are concerned with access to the media by various groups in society. The indicators assess regulatory and policy safeguards for community media, and for access to media by minorities, local and regional communities, women, and people with disabilities. In addition to access to the media by specific groups, the media literacy context is important for the state of media pluralism. The Social Inclusiveness area therefore also examines the country’s media literacy environment, as well as the digital skills of the overall population.

<sup>3</sup> See more: <http://respublica.edu.mk/attach/MODEM/dek/MODEM-izvestaj-dekemvri-ENG.pdf>





**The indicator on the access to media for minorities scores a low risk (29%).** The Law on AVMS provides that PSM broadcasts programme in non-majority languages and these provisions are effective – there is a nationwide coverage of news and culture programmes in minority languages. A problem arises, however, with the organisational structure of the broadcaster – it has separate newsrooms for the non-majority languages and not all of them have adequate human and technical resources to meet the quality criteria of the programmes. The relevant Law allows for minorities to have privately owned media stations that air in the languages of ethnic minorities.

**The indicator on the access to media for local communities and for community media is just below the high risk threshold (63%).** The current legislation does not contain specific provisions guaranteeing access for regional and local media to DTT, cable or IPTV platform, even though, all the regional and local TV channels are in reality distributed through one of these carriers. Must carry rules exist only for the channels of the public broadcaster. There is no obligation in the relevant law for the state to support local or regional media through subsidies. In addition, the state does not subsidise community media and as a result there are only three non-profit radio stations in the country, so this area is underdeveloped.

**The risks concerning access to media for people with disabilities are high (79%).** Though the Agency for AVMS undertakes activities to encourage the audio and audiovisual media service providers to make their services available to persons with hearing and visual impairment, still Macedonia's policies regarding access to media for people with disabilities are underdeveloped. The minimal provisions in the Law are also not respected in effect by broadcasters, even though the Agency has undertaken some measures to improve access to media for people with disabilities – it has conducted a baseline study concerning the state of the issue as a basis for a wider strategy, it has held meetings and discussions with the broadcasters and NGO's concerning the ways of tackling the problems etc.

**The indicator on the access to media for women scores a high risk (97%).** The PSM have no comprehensive gender equality policy. On the highest executive positions in the public broadcaster are men. This is also the case with the private TV stations with national coverage in the country. In total there are at present 56 individuals on managing positions in the private TV companies, out of which only 10 are women, or 17.7%. The top five TV companies do not have women on highest managing positions.

**Media literacy indicator is at a high risk (71%).** Macedonia has not adopted a strategy for the development of media literacy and digital competencies of the population. However the Agency on AVMS has adopted a Programme on media literacy development, created a media literacy network composed of all relevant stakeholders, commissioned research studies on the individual levels of media literacy among population, organized conferences and workshops and run an awareness raising campaign among population. The education system however is lagging far behind – there are no implemented curricula in secondary or high education on media literacy, even though there has been one known project that aimed at improving secondary school curricula with respect to media literacy. The impact of the informal education concerning media literacy has been very limited.

## 4. CONCLUSIONS

In 2017 there has been an overall relaxation of the political pressure on all media sectors. The relaxation was due to the political change that has ended the decade long rule of the semi-authoritarian national-populist government, which tended to capture the media and manipulated the public opinion to achieve wider approval of its policies.

Though the new government has pledged to make thorough systemic changes to depoliticize media and strengthen their democratic role, the structural problems still persist. Among the pressing measures were those that need: to break the tenacious clientelistic ties between media owners, editors and political actors; to tackle the lack of social and economic security of journalists; to resolve the financial instability and lack of editorial independence of the PSM, to strengthen the independence of the regulator; to discontinue the financial dependency of private media on state money; and to enable greater social inclusiveness in the media sector by ensuring greater representation of the economically deprived, of sexual minorities and the persons with special needs.

These measures should be understood as an introduction to greater systemic changes concerning the reform of the media system in the country, and for that, changes need to be made in relevant laws and measures need to be taken to ensure their implementation. The new government has already instated a new scheme for the financing of the PSM – directly from the budget – a measure that has divided the media community, and it has undertaken a consultation on the law on Audio and audio-visual media services. However this has been done without a prior construction of a national strategy which needs to answer the question – what does Macedonia want to achieve with the reforms in the media system. The absence of an answer to this question might pose a problem of policy orientation in the future.



## ANNEXE 1. COUNTRY TEAM

The Country team is composed of one or more national researchers that carried out the data collection and authored the country report.

First name	Last name	Position	Institution	MPM2017 CT Leader (please indicate with X)
Snezana	Trpevska	Lead researcher	Research Institute on Social Development – RESIS, www.resis.mk	x
Igor	Micevski	Researcher	Research Institute on Social Development – RESIS, www.resis.mk	
Gjorgi	Mitrevski	Researcher	Research Institute on Social Development – RESIS, www.resis.mk	

## ANNEXE 2. GROUP OF EXPERTS

First name	Last name	Position	Institution
Vesna	Nikodinovska	NGO researcher	Macedonian Institute for Media
Marina	Tuneva	Expert employed in the self-regulatory body	Council of Media Ethics
Marijana	Loncar Velkova	Representative of the consumers organisation	Association for Consumers Protection
Emilija	Petreska Kamenjarova	Expert employed in the media authority	Agency on Audio and Audiovisual Media Services
Goran	Gavrilov	Representative of a broadcasters' association	Association of Private Broadcasters
Dragan	Sekulovski	Representative of a journalists' association	Association of Journalists of Macedonia
Igor	Micevski	Academic researcher	Research Institute on Social Development - RESIS

## ANNEXE 3. SUMMARY OF STAKEHOLDERS MEETING

The meeting was held on May 28th 2018, in Skopje, at the premises of the Association of Journalists of Macedonia.

### List of participants:

Dejan Georgiev (NGO Media Development Center)

Klime Babunski (independent media expert)

Violeta Gligorovska (NGO Metamorphosis)

Zoran Fidanovski (Agency on Audio and Audiovisual Media Services, member of the Council)

Teofil Blazevski (Council of Media Ethics)

Nikola Naumovski (Association of Journalists of Macedonia)

Emilija Petreska Kamenjarova (expert from the Agency on Audio and Audiovisual Media Services)

Igor Micevski (RESIS Institute)

Snezana Trpevska (RESIS Institute)

**Key topics discussed:** methodology of the Media Pluralism Monitor; discrepancy between the legal guarantees and actual situation in media freedoms and media pluralism; lack of comprehensive media policy in the country.

## Conclusions

The report covers a period of dramatic transformations of the country's political landscape – in other words, a transition from an eleven-year-long semi-authoritarian type of rule, where the media were put under strict government control, to a process of slow democratization in several societal areas. The democratic changes started in May 2017, when the new coalition government was elected in Skopje after a prolonged political upheaval. This means that it was extremely complicated to make clear cut assessments of the risks for freedom of expression and media pluralism for the entire year. The political change, in the second half of the year, brought about a visible overall political relaxation accompanied by liberation of the media sectors from apparent pressures exerted in the previous period. It, however, did not immediately mean that the established political connections and control were diminished. The effects of the state capture were still felt in the media, even though the source of the influence was out of the power.

Several indicators have scored a moderate risk, even though the situation is somewhat more serious in practice. This is largely due to the indicators' evaluation methodology in which each indicator was assessed through a combination of 'normative variables' – those concerning the legislation's standards, and the 'practice variables' – those concerning the implementation of the legislation. Macedonia, like other countries in the Western Balkans, is characterized by a discrepancy between the legal guarantees and their implementation in practice. Consequently, it should be taken into account that 'moderate risk' in this report does not always mean a moderate value in the implementation of legal guarantees. If the implementation was to be evaluated as a separate set of variables from the legal norms, the risks would be greater for practice and lower for the legislation.

An illustrative example of this complexity would be the state of the journalists' profession, the standards and safety of journalists that scored just below the 'moderate risk' threshold, with 33%. In reality, the socio-economic situation of journalists in the newsrooms is still insufficiently safeguarded but the risk still scores 'moderate' due to the fact that legislation incorporates the relevant international standards. In addition, despite the fact that in 2017 there were no registered cases of incarceration or murder of journalists, journalist's safety is still a persisting problem in the country, since some erstwhile cases involving physical violence towards journalists are still unresolved by the courts.

The stakeholders' perception concerning the assessment for the indicator on media's role in the election processes is similar to this. The risk for this indicator scores low at 25% and this is mostly due to the legal protections in the Electoral Code and due to the fact that in the last electoral cycles there was an apparent improvement in the media coverage induced by the close monitoring by the international and national experts. The media consciously tried to make a better impression during the last election campaign, even though their real political alignment was still predominantly present and observable during other periods of reporting.

As a whole, the stakeholders underlined that the report is a good base for further discussion regarding the development of media policy. Macedonia lacks an all-encompassing media strategy which will rely upon real evaluation of the state in all media sectors and that will include the different aspects and dimensions of which media pluralism consists. This report rightly unravels questions and areas of media pluralism where the risks are very high and for which there has been neither a public discussion nor an establishment of visible policies in this country.



