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TV MEDIA IN THE REPUBLIC OF MACEDONIA – CURRENT SITUATION AND PERSPECTIVES

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Abstract: The aim of this paper is to present the situation in the Republic of Macedonia by analyzing the number of TV media, their geographical distribution, current legislative and perspectives in TV media development. There is a general agreement among media experts that the number of registered TV media in the RM (56, out of which 6 operate as national TV media) is quite big, having in mind that in RM live about 2 million inhabitants. Recently a new Law on Broadcasting Activity has come into force in order to ensure better regulation of the requirements and the manner of pursuing broadcasting activity in accordance with the international treaties that RM has ratified or acceded to.

Keywords: national TV media, local TV media, geographic distribution.

1. Media and their role in the society

The term media comprises numerous institutions and individuals who differ in cultural context and have different objectives, scopes and methods. In fact, the term media refers to the group of corporate entities, journalists, publishers and other participants who constitute the communications industry and profession.

Mass media exert great influence on the society but they are under the influence of the society as well. TV in the living room, daily newspapers on the doorstep, radio in the cars, PCs on the working desks, fliers in the mailboxes are just a small part of the available media channels through which lot of news, announcements, ads, opinion, music and other forms of mass communication have been delivered.

Mass media are specific as they are media for one-side communications; the audience has great possibility to choose; they can reach big audience; the objective of the message sent through mass media is attracting as bigger audience as possible.

Anyway, only one thing is for sure, without media, most of the people will be acquainted with events that are happening in their nearest neighborhood. Despite of this situation nowadays, people can simply turn on TV or connect and search the Internet and get the information requested immediately.

2. The situation in TV media industry in the Republic of Macedonia

Media activities in the Republic of Macedonia were previously regulated by the Law on Broadcasting Activity dated back from 1974, 1995 and 1997¹². In November 2005 a new Law on Broadcasting Activity¹³ came into force regulating the conditions for and manner of pursuing broadcasting activity and matters of public interest in the

¹² Official Gazette of SRM No.20/74 and 2/95, Official Gazette of the RM No.20/97

¹³ Official Gazette of the Republic of Macedonia No.100, 21 November 2005

field of broadcasting. The Broadcasting activity is the transmission of radio and/or television program services, regardless of the transmission technology used, in coded or un-coded form, intended for public reception¹⁴. Printed media issues are not regulated by particular law, except the issues pertaining the restrictions of media property that are regulated by articles that refer to broadcasting and printed media as well, which can be found in the Law on Broadcasting Activity.

According to the previous Broadcasting Law, broadcasting media operations are based on concession given to the media companies on the basis of the Broadcasting Law and Law on Telecommunications (Official Gazette of the Republic of Macedonia No.22/98), while according to the new Broadcasting Law the term concession no longer exists and instead of the concession, broadcasting companies work on the basis of the licenses given.

It is important to point out that in the media industry there are widely accepted universal standards (article 10 from the Human rights convention guarantees freedom in expression of thoughts and informing – as one of the basic right for each individual taking into account the principle of media independence). In the Republic of Macedonia article 2 of the Law on Broadcasting Activity clearly states that the main aim of the mentioned law is to provide freedom of expression in the broadcasting activity, in accordance with the Constitution of the Republic of Macedonia and international treaties ratified and acceded to by the Republic of Macedonia.

According to the new Broadcasting Law there are several different broadcasting activities: broadcasting activity on national level (broadcasters that provide coverage in terms of listeners or viewers, of at least 80% of the total population of the Republic of Macedonia), broadcasting activity on regional level (broadcasters that provide coverage in terms of listeners and viewers, for a territory of several municipalities that form a natural geographic or democratic entity with a population from 150,000 to 400,000 citizens) and broadcasting activity on local level (broadcasters that provide coverage in terms of listeners or viewers for the area of a single settlement and its immediate surroundings with population that shall not exceed 150,000 citizens)¹⁵.

Regarding the broadcasters (broadcasting companies or enterprises) there are also several different types of broadcasters: public communications network operator (public broadcasting enterprise) established for the whole territory of the Republic of Macedonia performing a function of a public broadcasting service; commercial broadcasting company; and non-profit broadcasting institution.¹⁶

Above mentioned are the main differences between the new (current) and the old Law on Broadcasting Activity. Namely, the old Law on Broadcasting Activity stated that there were only two types of broadcasters (public broadcasting enterprises and commercial broadcasting enterprises) contrary to the new Law on Broadcasting Activity stating that there are three types of broadcasters (public broadcasting enterprises, commercial broadcasting companies and non-profit broadcasting institutions that can be established by educational, cultural and other institutions and

¹⁴ Official Gazette of the Republic of Macedonia No.100, 2005, article 3

¹⁵ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia, No.100, 2005, article 4

¹⁶ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 7

citizens' associations with the aim to provide for the needs and interests of specific target groups.¹⁷

What is specific for the Republic of Macedonia is that after a relatively long period of 27 years¹⁸ during which the main characteristic was the domination (monopoly) of the state owned public broadcasting enterprise Macedonian radio and television (MTV) (established in 1964 as public broadcasting organization – public service established by the Government of the Republic of Macedonia) and state owned newsletter-publishing house New Macedonia, a new period of existence of numerous private electronic media (radio and television broadcasting companies as well as publishing companies) in the domestic market has begun. In 1995 the number of private companies registered for broadcasting activities substantially increased and till 1997 (when the Law on Broadcasting Activity came into force)¹⁹, the total number of radio and television broadcasting companies in private property in the Republic of Macedonia reached the number of 250.²⁰ In the next period the number of private broadcasting companies started to decrease and in December 2003 there were totaled 126 commercial broadcasting companies out of which 5 with a concession to broadcast nationally (two TV broadcasting companies and three radio broadcasting companies) and 121 broadcasting companies with a concession to broadcast locally (67 for radio broadcasting and 54 for television broadcasting)²¹. Namely, after a period of existing solely of one national radio and television station in the whole country, new changes in current legislative covering the media sphere has happened i.e. a period of media pluralism and liberalization of the Macedonian media market has started meaning that the Republic of Macedonia decided to abandon the broadcasting model with only one television and radio broadcasting company and decided to develop a dual broadcasting model that gave a possibility of parallel existence of private and public sector in media business.

With the recent changes in the Law on Broadcasting Activity, the Republic of Macedonia has started developing triplex broadcasting model (parallel existence of public broadcasting enterprises, commercial broadcasting companies and non-profit broadcasting institutions). It has to be stress out that the private sector operates through concession to pursue broadcasting activity (instead of concession a new Law determines the issuance of licenses which is significant difference between the old and new Law on Broadcasting Activity) issued by the Government of the Republic of Macedonia upon the proposal from the Broadcasting Council. This provision in 1999 was emphasized by the legal experts of the European Council²² as a matter of serious concern for giving the right for making final decisions on the broadcasting licensees' allocation in the field of the government's competence. However as a result of the

¹⁷ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.20,1997, articles 7 and 10

¹⁸ the first private media in the Republic of Macedonia started to work in 1991

¹⁹ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.20, 30.04.1977

²⁰ Macedonian Media Institute, "Media property and its influence on media independence and pluralism", Skopje 2004, page.43

²¹ Macedonian Media Institute, "Media property and its influence on media independence and pluralism", Skopje 2004, page.44

²² Expertise on the Draft-Law on the Broadcasting Activity, Skopje, December, 1995, European Council.

recommendation given by the European Institute for the Media in Düsseldorf that more executive power be granted to the Broadcasting Council, specifically in the area of licensing²³, change has been made and according to the new Law the Broadcasting Council decide with majority of votes of the total number of its members (9 members) to grant licenses to pursue broadcasting activity²⁴. License to pursue broadcasting activity for the transmission of a given television program service in the whole territory of the Republic of Macedonia (giving a status of national television i.e. television on national level) can be granted to a commercial broadcasting company only if the company can obtain coverage in terms of viewers of at least 80% of the total population of the Republic of Macedonia²⁵. The previous Law stated that licenses to pursue broadcasting activity could be given to the company that could obtain coverage of 70% of the total population of the Republic of Macedonia²⁶ which is another essential and note-worthy difference between the previous and Law on Broadcasting Activity that is currently in force.

Having in mind that it is impossible the situation in the Republic of Macedonia regarding all types of media to be presented in this paper, the paper pays attention only to television as a media. So, currently in the Republic of Macedonia there are numerous private television broadcasting companies (commercial TV companies) and one public television enterprise *Macedonian television* (MTV) with 3 program channels that are broadcasted on national level. It is public national television service with right to broadcast program throughout the whole territory of the Republic of Macedonia. At the same time out of the numerous private television broadcasting companies (the number of commercial TV broadcasting companies on national and local level according to the latest official data in the Republic of Macedonia totaled 55) only 5 have gained the license to pursue broadcasting (television) activity on national level. Thereby it can be said that 6 TV companies (including MTV) work in the Republic of Macedonia on national level out of which one is a public and the rest are commercial broadcasting companies. (See Table 2). Out of the 5 commercial broadcasting companies with a right to broadcast nationally, one company (Alsat-M) that should broadcast program in Albanian language haven't started its operation yet²⁷.

Namely, after a period of slightly decrease in the number of registered electronic media in the Republic of Macedonia, it can be noticed that in December 2004 the number of registered broadcasting companies slightly increased and there were 132 commercial broadcasting companies out of which 4 were national TV broadcasting companies, 3 national radio broadcasting companies and 125 local broadcasting companies (73 radio and 52 TV broadcasting companies). Also there were one public

²³ European Institute for the Media (1999), Monitoring of the media coverage of the October-November, 1998 parliamentary elections in F.Y.R. Macedonia, Final Report, January, 1999: 51.

²⁴ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 52

²⁵ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 4

²⁶ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.20, 30.04.1977, article 18

²⁷ Trpeska Snezana, "Ekonomiski uticaj na nezavisnost medija u Makedonij: Pritisak ili samocenzura?", ("Economic influence on the media independence in the Republic of Macedonia: Pressure or autocensorship?") 2005, <http://www.anem.org.yu> (access made on 01.12.2005)

broadcasting company (MTV) and 29 public radio broadcasting companies (out of which 12 operated as TV broadcasting companies as well) or in other words there were 57 TV broadcasting companies plus 12 radio broadcasting companies that also broadcast TV program) and 153 radio companies or in total 179 electronic media companies²⁸. The previously mentioned 12 radio broadcasting companies that broadcast TV program have been operating without any concession for TV broadcasting activities given by the Broadcasting Council (they possess only concession for radio broadcasting activities) and according to the Broadcasting Council they are practically illegal but however their TV broadcasting activities have been tolerated so far.

Currently 5 companies are registered as commercial broadcasting companies with a right to broadcast on national level, one is public national TV broadcasting enterprise (MTV) with 3 program channels and the rest 50 are registered as commercial broadcasting companies on local level. Out of the 50 commercial broadcasting companies on local level, most probably 8 will get a license to pursue broadcasting activity on regional level as they all are located in Skopje²⁹.

However, the new Law on Broadcasting Activity will be completely implemented in the practice pertaining the licenses for broadcasting activities on national, regional and local level (Concession agreements concluded pursuant to the previous Broadcasting Laws (Official Gazette of the RM No.20/97 and 70/2003) between the Government of the Republic of Macedonia and the commercial broadcasting companies shall be harmonized to the provisions of the new broadcasting Law) within 18 months from the day of entering into force of the new Law³⁰. One of the main reasons of existence of such a big number of TV media in the Republic of Macedonia is the regulation according to which the license to pursue broadcasting activity can not be transferred to another person, nor to be sold³¹. The afore-mentioned can be noticed from the following Table 1 presenting the geographical distribution of all commercial television broadcasting companies located in several big cities in the Republic of Macedonia.

Table 1. Local TV broadcasting companies registered as commercial companies in several big Macedonian cities

City	Number of local commercial TV broadcasting companies	Commercial TV broadcasting companies in private property	Population ³²
<i>Bitola</i>	3	TV company Tera TV company Medi TV company Orbis	86.408
<i>Valandovo</i>	1	TV company VTV	11.890

²⁸ <http://www.srd.org.mk> (access made on 07.12.2005)

²⁹ Cities with a population from 150.000 to 400.000 citizens are considered as separate region. The City of Skopje and its surroundings is considered as separate region. (Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21.11.2005, article 4)

³⁰ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 172

³¹ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 58

³² Statistical Yearbook of the Republic of Macedonia, 2004

City	Number of local commercial TV broadcasting companies	Commercial TV broadcasting companies in private property	Population³²
<i>Veles</i>	2	TV company Zdravkin TV company Kanal 21	57.602
<i>Gevgelija</i>	2	TV company Nova TV company Mig21	20.362
<i>Gostivar</i>	1	TV company Due	
<i>Debar</i>	2	TV company Alfa-D TV company Zupa (Centar Zupa)	17.952
<i>Kavadarci</i>	1	TV company KTV41	38.391
<i>Kicevo</i>	3	TV company Boem TV company Uskana TV company Gurra	30.138
<i>Kumanovo</i>	4	TV company Nova TV company Hana TV company Dalga-Krt TV company Festa	103.205
<i>Makedonski brod</i>	1	TV company Anisa	5.588
<i>Ohrid</i>	3	TV company Moris TV company NTV TV company TVM	54.380
<i>Probistip</i>	1	TV company Protel	12.765
<i>Radovis</i>	2	TV company Ko-Bra TV company Emi	24.498
<i>Skopje</i>	12	TV company MS TV company MTM TV company Toska TV company EDO TV company Sutel TV company Amazon TV company Skynet TV company Era TV company TV4 TV company BTR TV company Krt TV company Alfa	467.257
<i>Struga</i>	2	TV company Kaltrina ART kanal	36892
<i>Strumica</i>	2	TV company Intel TV company Vis	45.087
<i>Sveti Nikole</i>	1	TV company Svet	18.497
<i>Tetovo</i>	5	TV company Menada TV company Koha	70.841

Business Statistic – Economic Informatics			
City	Number of local commercial TV broadcasting companies	Commercial TV broadcasting companies in private property	Population ³²
		TV company Super Sky TV company Art TV company Kiss	
<i>Stip</i>	2	TV company Iris TV company Star	47.796
Total:	50		1.149.549

Table 2. TV broadcasting companies on national level (public enterprises and commercial companies)

National TV broadcasting companies	Number of TV program channels
1. MTV (two program channels in Macedonian language, one in Albanian language)	3
2. Alsat – M (program in Albanian language)	1
3. A1 (program in Macedonian language)	1
4. Sitel (program in Macedonian language)	1
5. Kanal 5 (program in Macedonian language)	1
6. Telma (program in Macedonian language)	1

In accordance with the data dated 2000, in USA (population:290.342.554-July 2003 and size: 9.626.091 km²) there were 1,489 newsletters (with 60 million subscribers), 11,928 radio stations, 1,684 TV stations, 51 million cable subscribers, 1,763 magazines intended for consumers³³. In contrast to the situation in the USA regarding the media market where there are numerous media, in the Republic of Macedonia the number of media is far smaller expressed in absolute numbers, which is mainly result of the small size of the territory of the Republic of Macedonia (25,713 km²), small size of the population (2,022,547 according to the Census in 2002)³⁴, insufficient development of the media technology and modern communications means as well. The functioning of over 50 TV broadcasting companies in a territory of approximately 2,000,000 citizens means that there is a large number of TV broadcasting companies existing in a relatively small market, having in mind that one TV broadcasting company serves about 37,000 people in average. In USA the average data shows about 173,000 citizens per one TV media³⁵.

³³ www.uiowa.edu/~c019095

³⁴ Statistical Yearbook of the Republic of Macedonia, 2004

³⁵ www.uiowa.edu/~c019095

But, in spite of the numerous TV broadcasting companies that compete among each other in the Republic of Macedonia, the income achieved is relatively big, meaning that all TV broadcasting companies work successful in the market where the competition is quite strong. According to the closing calculations for the year 2004, MTV company (Macedonian National Television) made an income of cca 5,000,000 EUR; cable TV companies 7,000,000 EUR, and private TV broadcasting companies (commercial companies) cca 4,750,000 EUR³⁶.

3. Perspectives in TV media development in the Republic of Macedonia

In view of the market evolution theory (Kotler, 2003)³⁷, based on which every market evolves through the phases of introduction, growth, maturity and decline, it is obvious that TV market in the Republic of Macedonia is experiencing the maturity phase. Namely, till 1991 in the Republic of Macedonia only *Macedonian radio and television* existed, but since 1991 the number of TV media has started to increase with slight variations, so today it can be said that the condition is stable and the media market starts to show characteristics typically for the maturity phase. In the maturity phase two different processes can run: market fragmentation and market consolidation. The TV media market in the Republic of Macedonia is in maturity phase or more specifically in the sub-phase of market fragmentation. What is expected in the future is market consolidation, for what the current legislative which regulates the issue of prohibited media concentration has to be taken into account (Law on Broadcasting Activity). Beside that, the changes in broadcasting activity probably will go in the direction of stimulation of their own programs i.e. stimulation of the domestic creations and cultural identity as well. With regards to the above mentioned, new changes in the Law on Broadcasting Activity have been accepted regulating that broadcasters that hold license to pursue broadcasting activity for television program services should dedicate at least 30% of their daily broadcast time to programs originally created in the Macedonian language or in the languages used by the non-majority communities living in the Republic of Macedonia³⁸. In order the program quality of the national television stations to be improved, a new obligation regarding the broadcasting of the European audiovisual works has been imposed and the regulation obliges the broadcasters that hold licenses to pursue broadcasting activity for television program services on national level to provide representation of European audiovisual works to amount of at least 51% of the total annual broadcast programs having in mind that the air-time dedicated to broadcasts for news, sport events, game shows, advertising, teletext and teleshopping services should not be counted toward the mentioned total annual broadcast programs³⁹.

4. Conclusion

Since the TV media property in the Republic of Macedonia is quite fragmented (there are many small TV broadcasting companies), the future TV media industry

³⁶ Public Revenue Office in Republic of Macedonia (Official data for year 2004)

³⁷ Kotler Philip, *Marketing Management*, Prentice Hall, USA, 2003, p.340-342

³⁸ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 74

³⁹ Law on Broadcasting Activity, Official Gazette of the Republic of Macedonia No.100, 21 November 2005, article 73

development will be directed towards creation of economic strong but at the same time professional broadcasting companies that will bring new and better quality program i.e. this will mean liberalization of the TV media concentration and freedom in capital circulation in the broadcasting activity. The good regulative regarding the broadcasting activity unquestionably will induce the better quality program as well as better quality of the advertising, teleshoping and other paid advertisements (announcements) distributed through TV broadcasting companies.

Also, TV broadcasting companies with solid foundation and with good program quality will have an influence over other enterprises that use TV media for their promotional aims having in mind that the TV broadcasting companies are part of the so called value chain of each enterprise and therefore doubtlessly the total profit i.e. success of the enterprises in Republic of Macedonia that work in various different businesses depends on the quality of the broadcasting services and on cooperation with existing TV broadcasting companies. The better the quality of the broadcasting services and the cooperation with broadcasting companies, the better results (financial and non-financial) that the company can achieve.

The situation with MTV has been extremely alarming for a long period of time since this broadcaster has huge old debts, problems with overemployment, low salaries, strikes (dissatisfied employees), many of the professionals employed in MTV leave MTV and find more challenging posts in private broadcasters although MTV has invested lot of money and has made it possible for them to receive advanced training and education and although MTV is still considered as the best institution where beginners can gathered valuable experience necessary for their carrier advancement.

So the future will show whether the combination of decisions typical for our unique, multicultural society with modern, sophisticated, “European” regulations will have effects on broadcasting activities in our country.

Nevertheless, passing the Law on Broadcasting Activity in the Republic of Macedonia is a powerful flash in the tunnel of confusion and political influence in broadcasting sector which were the main characteristics in the field of broadcasting during the previous period.

Finally, for the first time in the Republic of Macedonia there is a satisfaction regarding the new broadcasting regulations expressed by the private and public broadcasting sector, influential political groups as well as by public itself. There is nothing left but to wait time to show whether there will be success in the intention European standards to be introduced in the Macedonian broadcasting services together with the intention financial consolidation of the whole public broadcasting area to be carried out.

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