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The Challenge of a Small Market in a Politicised Society: Media Management in North Macedonia

ABSTRACT

This paper examines the media system of North Macedonia through the combined lenses of media systems theory, media economics, and media management. Here, media management is understood as the strategic organisation of financing, staffing, and editorial work under market and regulatory constraints. The paper argues that North Macedonia is a small, politically exposed market in which financial fragility and political polarisation interact to shape editorial autonomy. Drawing on the media typologies of Hallin and Mancini and Dobek-Ostrowska, it positions the country in a transitional media environment with strong features of polarised pluralism. The analysis combines macro-economic indicators, market data on broadcasters, and qualitative evidence on ownership, public service funding, state advertising, paid political advertising, online media regulation, and journalists' working conditions. Rather than proposing a new typology, the paper presents a theoretically informed case study that shows how small-market conditions intensify the interaction among state intervention, political parallelism, and weak professional autonomy. The findings show a hybrid media market: traditional media remain influential but financially vulnerable, while online media exert growing agenda-setting power in a weakly regulated environment. Public money, whether through state campaigns or election advertising, affects not only financing but also competition, clientelism, and editorial independence. The conclusion identifies the institutional and managerial conditions under which journalistic integrity and democratic pluralism are more likely to be sustained in North Macedonia.

KEYWORDS: media management, media systems, North Macedonia, public service, financial sustainability

Suggested citation: Bachovska Nedikj, J. (2026). The Challenge of a Small Market in a Politicised Society: Media Management in North Macedonia. © ⓘ *Perspectives on Culture*, 3(53), pp. 215–231. <https://doi.org/10.35765/pk.2026.5403.13>

Submitted: 11.12.2025

Accepted: 6.03.2026

STRESZCZENIE

Wyzwania małego rynku mediów w upolitycznionym społeczeństwie:
zarządzanie mediami w Macedonii Północnej

W niniejszym artykule przeanalizowano system medialny Macedonii Północnej, łącząc perspektywę teorii systemów medialnych, ekonomii mediów i zarządzania mediami. Zarządzanie mediami rozumiane jest tu jako strategiczna organizacja finansowania, kadr oraz pracy redakcyjnej w ramach ograniczeń rynkowych i regulacyjnych. W artykule argumentuje się, że Macedonia Północna jest małym, upolitycznionym rynkiem, na którym niestabilność finansowa i polaryzacja polityczna współdziałają, kształtując autonomię redakcyjną. Opierając się na typologiach Hallina i Manciniego oraz Dobek-Ostrowskiej, artykuł umieszcza kraj w przejściowym środowisku medialnym o silnych cechach spolaryzowanego pluralizmu. Analiza łączy wskaźniki makroekonomiczne, dane rynkowe dotyczące nadawców i dane jakościowe dotyczące własności, finansowania usług publicznych, reklamy państwowej, płatnej reklamy politycznej, regulacji mediów internetowych oraz warunków pracy dziennikarzy. Zamiast proponować nową typologię, artykuł przedstawia oparte na koncepcji studium przypadku, które pokazuje, jak warunki małego rynku nasilają interakcję między interwencją państwa, paralelizmem politycznym i słabą autonomią zawodową. Wyniki wskazują na hybrydowy rynek mediów: media tradycyjne pozostają wpływowe, ale wrażliwe finansowo, podczas gdy media internetowe wywierają rosnącą siłę wyznaczania agendy w słabo regulowanym środowisku. Środki publiczne, czy to poprzez kampanie państwowe, czy reklamę wyborczą, wpływają nie tylko na finansowanie, ale także na konkurencję, klientelizm i niezależność redakcyjną. W podsumowaniu wskazano warunki instytucjonalne i zarządcze, w których istnieje większe prawdopodobieństwo utrzymania rzetelności dziennikarskiej i pluralizmu demokratycznego w Macedonii Północnej.

SŁOWA KLUCZE: zarządzanie mediami, systemy medialne, Macedonia Północna, media publiczne, stabilność finansowa

Introduction

Market forces shape media structures, content production, and the scope of pluralism in democratic societies (Picard, 2014). Media pluralism is therefore not only a normative democratic value but also an economic outcome, supported or constrained by the business models available to media organisations (Doyle, 2013). This article examines the media system of North Macedonia from this perspective. Media management herein refers to the strategic organisation of revenues, costs, staffing, and editorial decision-making in media organisations under market and regulatory pressures. The phrase politicised society is used to describe a context in which political competition strongly structures public

communication, access to resources, and public visibility. The central argument is that the country’s media market cannot be understood solely through ownership patterns or professional norms. Rather, it must be analysed in the context of a small economy, a highly politicised public sphere, and management strategies shaped by financial insecurity.

North Macedonia is a small, open economy with a population of just over 1.8 million (State Statistical Office, 2022). Since gaining independence in 1991, it has undergone a prolonged and uneven transition that has affected its institutions and markets. According to the World Bank and the National Bank of the Republic of North Macedonia, GDP growth remains moderate, inflation has recently been driven by rising food and energy prices, and public debt and budgetary pressures remain significant due to energy subsidies and capital expenditure (National Bank of the Republic of North Macedonia, 2023). Unemployment has declined, partly due to active labour market policies and partly due to emigration, especially among younger citizens. Malevski and Barakovski (2023) note that tens of thousands of young people have left the country, while many more express a desire to do so. These conditions are highly relevant to the media market because a limited consumer base, reduced purchasing power, and outward migration constrain advertising revenues and weaken the long-term sustainability of media organisations.

North Macedonia has held EU candidate status since 2005, which has shaped both its economic orientation and the normative framework in which media reform is discussed. The economy is export-oriented, closely integrated with the EU market, while major structural challenges continue to include the rule of law, administrative effectiveness, infrastructure, and the mismatch between educational outcomes and labour-market needs (European Commission, 2024). These broader governance deficits are relevant to media management because institutional weaknesses inevitably affect the media. They affect regulation, public procurement, access to information, and the ability of journalists and editors to act independently.

Table 1. Macroeconomic indicators for North Macedonia

Indicator	Value	Year
GDP	USD 16.68–16.7 billion	2024 (estimate)
GDP per capita	USD 9,169–9,310	2024 (estimate)
GDP (annual growth %)	2.8	2024 (estimate)
Unemployment (% of total labour force)	13.0%–13.4%	2024 (estimate)
Inflation, consumer prices (annual %)	3.5%	2024 (estimate)

Source: World Bank.

The media market must also be understood within the context of a deeply politicised society. Politics has a strong presence in everyday public life, and political elites dominate news agendas. Monitoring research has shown that television news provides significantly greater visibility to government actors than to other socio-political groups, while the voices of ordinary citizens, although present, remains secondary (Monitoring Report, 2019). This imbalance is not merely a matter of news selection. It reflects a political culture in which media attention is centred on those in power. As a consequence, the struggle for visibility in the media becomes closely intertwined with the struggle for political legitimacy.

The broader social context reinforces this pattern. North Macedonia remains deeply polarised, as repeatedly noted in recent European Commission reports (European Commission, 2023; European Commission, 2024). Transparency International ranks the country in relatively poorly, linking this to judicial scandals and the impunity of high-level corruption cases (Transparency International, n.d.). The State Commission for the Prevention of Corruption has likewise identified party-based recruitment and nepotism in public institutions (State Commission for the Prevention of Corruption, 2024). For the media, the implications are clear: where political trust is low and public institutions are vulnerable to patronage, media outlets often become extensions of political competition rather than independent arenas for public deliberation.

In this environment, the media market assumes a hybrid character. Traditional broadcasters, particularly national television stations, remain influential, particularly in political news, yet they operate under persistent financial pressure. At the same time, online media increasingly shape the daily agenda, especially among younger audiences, but do so in a regulatory space characterised by ambiguity and limited oversight. This combination of economic fragility in legacy media and weak regulation in digital media creates conditions that are conducive to disinformation, manipulation, and politically motivated financing. The result is not simply a weak market but one in which financial vulnerability and political parallelism reinforce one another.

Methodologically, the paper combines comparative media-system analysis with economic and qualitative evidence. The empirical analysis is organised around the key dimensions emphasised in comparative media-systems theory: the role of the state, market structure, and professional autonomy. Section 2 positions North Macedonia within the typologies developed by Hallin and Mancini (2004) and Dobek-Ostrowska (2015). Section 3 examines the country's media economy using macroeconomic indicators and market data from the Agency for Audio and Audiovisual Media Services, including the number of broadcasters, revenues, costs, and public-service financing. Qualitative evidence from domestic institutions, journalists' associations, international reports, and specialised studies are used to interpret ownership structures, public advertising, political advertising, online media regulation, and labour

conditions in journalism. This design does not seek to propose a new media-system model. Its contribution is interpretive: it shows how the theoretical indicators of politicisation, state intervention, and weak professional autonomy are reflected in the everyday practices of a small transitional market.

North Macedonia in a Comparative Context: Media System Theory

According to the classical typology developed by Hallin and Mancini (2004), North Macedonia most closely resembles the polarised pluralist model. Hallin and Mancini classify media systems according to the degree of development of the mass press, the degree of political parallelism, the level of journalistic professionalism, and the role of the state. In their framework, the liberal model is characterised by limited state intervention, high professional autonomy, and a low degree of political parallelism. The democratic corporatist model combines a historically strong party press with robust public service institutions and high newspaper circulation. By contrast, the polarised pluralist model is characterised by low newspaper circulation, elite-oriented and politically aligned media, stronger state intervention, and weaker professionalisation.

North Macedonia most closely fits this third pattern than the other two. Newspaper circulation is low, journalism has historically developed under strong political pressure, and media outlets are often perceived through the lens of their ideological or party affiliations. Moreover, the state remains a key actor in the media sphere, not only through regulation and public-service financing but also through state advertising and election-related payments. These characteristics make the Macedonian media system resemble the polarised pluralist model, even though the country belongs to a different historical and regional context from that of the Mediterranean cases discussed by Hallin and Mancini.

Dobek-Ostrowska (2015) offers a framework that is more specifically tailored to post-communist Central and Eastern Europe. Her classification employs indicators such as democratic performance, media freedom, gross national income, and internet penetration to distinguish four models: hybrid liberal, politicised media, media in transition, and authoritarian. Within this typology, North Macedonia is classified as a country in media transition, alongside Albania, Bosnia and Herzegovina, Kosovo, Montenegro, and several other countries. This model is characterised by low democratic standards, fragile political and civic culture, strong media politicisation, and limited media autonomy. Dobek-Ostrowska further argues that North Macedonia also shows characteristics of the politicised media model, which more closely resembles the polarised pluralist pattern.

Taken together, these models are used here not as rigid classificatory frameworks but as interpretive tools. The paper argues that North Macedonia is best understood as a transitional small-market system in which the structural limitations of the market intensify features typically associated with polarised pluralism. The contribution of this case study, therefore, lies less in revising the typologies themselves than in demonstrating how economic fragility, public financing, and labour precarity give concrete expression to political parallelism and weak professional autonomy. Empirical indicators such as the financial concentration of advertising revenue, inconsistent public service funding, the return of state advertising, dependence on paid political advertising during election campaigns, weak regulation of online media, and the precarious socio-economic position of journalists all point in the same direction. Together, they depict a media system in transition whose market logic is repeatedly shaped and constrained by political influence.

Empirical Data on the Media Market in North Macedonia

Legal and Funding Framework

Media financing in North Macedonia is governed primarily by the Law on Audio and Audiovisual Media Services, the Law on Media, and the Electoral Code. The first regulates the financing of the public service broadcaster, the operation of the media regulator, and the principal rules governing advertising. The Electoral Code determines the allocation of state funds for paid political advertising during election campaigns. The Law on Media sets out the rights and obligations of media outlets, including those operating in the print sector. Formally, this legal framework is intended to organise the market and safeguard media pluralism. In practice, however, it also creates channels through which political actors can affect market behaviour.

The law requires the state to allocate approximately 0.8% to 1% of the previous year's total budget revenues to the audiovisual sector. Of these funds, 74.5% are allocated to Macedonian Radio Television (MRT), 19.5% for the public enterprise Macedonian Broadcasting, and 6% for the Agency for Audio and Audiovisual Media Services. At the same time, private media are expected to rely, in principle, on advertising revenue, subscriptions, and other market-based sources. In practice, however, the state continues to play an important financial role through public communication campaigns, paid political advertising during election campaigns, and direct subsidies to print media covering part of the printing and distribution costs of print media. This dual financial structure is important because it means that the market is not governed solely by market forces. Public funding remains a key resource for survival and competition.

Structure of the Traditional Market

According to the 2024 market analysis by the Agency for Audio and Audiovisual Media Services, North Macedonia had 103 commercial broadcasters at the beginning of 2024, comprising 40 television stations and 63 radio stations. By the end of the year, the number had fallen to 92. The sector generated slightly more than EUR 52 million in revenue and recorded an overall profit of slightly more than EUR 3 million. These figures, however, should not be interpreted as evidence of market stability. Once the internal structure of the market is considered, it becomes clear that revenues are heavily concentrated among a small number of national television stations, while local and regional media remain structurally fragile.

Table 2. Market analysis

Category	No. of outlets	Total revenue (mil. EUR)	Ad revenue (mil. EUR)	Total costs (mil. EUR)	Operating result (mil. EUR)	Avg. no. of employees
Macedonian public service broadcaster	/	22.17	0.55	20.56	1.42	630
Commercial televisions	36	26.10	24.60	24.39	1.46	887
National level (terrestrial)	5	21.36	20.21	19.37	1.82	585
National level (unlimited resource)	5	2.31	2.20	2.94	-0.65	177
Regional level	13	1.67	1.43	1.55	0.08	82
Local level	13	0.74	0.72	0.54	0.20	43
Commercial radio stations	53	4.00	3.14	3.65	0.35	186
National level (radio)	4	1.82	1.36	1.56	0.24	57
Regional level (radio)	14	1.38	1.17	1.26	0.10	60
Local level (radio)	35	0.79	0.60	0.82	0.02	69
Total		52.26	28.36	48.61	3.24	1703

Source: Agency for Audio and Audiovisual Media Services, 2024 *Note*. The Agency for Audio and Audiovisual Media Services is an autonomous and independent regulatory body whose competencies are defined in the Law on Audio and Audiovisual Media Services.

Revenue concentration is particularly evident in the television sector. National terrestrial broadcasters account for the largest share of both total revenue and advertising income, whereas regional and local broadcasters operate with considerably smaller budgets. This uneven market structure is theoretically significant because it links the market's economic characteristics to the problem of political parallelism. Media outlets that are unable to secure stable commercial revenue are more likely to depend on politically dependent funding, informal networks, or short-term clientelist arrangements.

Macedonian Public Service Broadcaster

For most of the period following independence in 1991, the public service broadcaster was financed through a license fee paid by citizens. This model was characterised by high administrative costs and persistently low collection rates. After 2000, the licensee fee began to be collected through electricity bills, but payment compliance remained problematic. In 2017, following a change of government, the broadcasting fee was abolished, and the public service broadcaster became directly financed from the state budget.

Direct budget financing, however, has not resolved the underlying problem. For several years, the funds allocated to MRT remained below the level prescribed by law, a shortfall repeatedly highlighted by the Agency for Audio and Audiovisual Media Services. Only in 2024 was the full amount required by law finally transferred. The problem, therefore, concerns not only the amount of funding but also its predictability. A public service broadcaster that depends on annual political decisions to receive its legally mandated funding operates under conditions of persistent structural vulnerability. This vulnerability weakens its planning capacity, investment, and editorial confidence.

The broadcaster has also experienced a long-term decline in staffing, from more than 1,100 employees in earlier years to around 650. At the same time, it faces expanding programming obligations and the need for technological modernisation. As Apostolov (2024) argues, the public service broadcaster remains financially fragile and politically constrained. The broader implications are significant: when public service media cannot function as a stable and credible reference point, the commercial media sector faces less normative pressure to invest in public-interest content, and the overall information environment becomes more vulnerable to sensationalism and political capture.

Commercial Televisions

North Macedonia has relatively transparent formal ownership rules for radio, television, and print media owing to legal disclosure requirements established by

the Law on Media (2013). However, formal transparency does not automatically prevent political influence. In many cases, media ownership is not the primary business activity of the owners but rather an ancillary investment. As a result, media outlets may become susceptible to non-commercial objectives, including political influence, prestige, or the protection of broader business interests.

Although no official statistics on advertisers are available, observable advertising patterns suggest a concentration of commercial revenue in sectors such as automotive sales, telecommunications, banking, pharmaceuticals, and food and beverages. At the same time, the enforcement of ownership restrictions remains weak. Research has documented politically sensitive ownership patterns, including television stations owned by individuals linked to political figures, the use of offshore structures in print media ownership, and foreign ownership networks associated with the Hungarian political sphere (Dumont et al., 2021). These examples matter because they show that the market is not influenced only by direct state intervention. It is also shaped by business-political alliances that blur the distinction between economic investment and political positioning.

Radio

The 53 radio stations generated EUR 4.00 million in revenue and EUR 353,821 in profit. Compared with the television sector, the radio market recorded growth, partly driven by political advertising and partly because of increased commercial advertising. According to the Agency for Audio and Audiovisual Media Services (2023), revenues grew by 32.76% compared with the previous year. However, this growth should be interpreted with caution. If the rise is driven in part by election-related spending, it does not necessarily indicate long-term structural sustainability.

The radio market also exhibits internal concentration. Just three stations—Antena 5, Channel 77, and Buba Mara—account for more than 42% of total costs in the sector. Local radio stations remain more fragile, with weaker commercial advertising performance. This reinforces the paper's central argument: when market survival depends on a small number of dominant actors and periodic injections of political funding, media pluralism may exist formally without being supported by stable economic foundations.

Online Media: Lack of Regulation and Vulnerability to Manipulation

Online media occupy an increasingly important position in North Macedonia's media system, yet the sector remains only partially regulated. There is no

mandatory official register of online media. The most reliable source of information is the Register of Online Media maintained through the ProMedia platform by the Association of Journalists of Macedonia and the Council of Media Ethics. The number of registered portals fluctuates, but in 2024 and 2025, the register contained approximately 100 or 101 outlets. Registration requires transparent ownership, an imprint, the registration of a legal entity, copyright law compliance, and respect for the journalistic code.

A separate register of online media is maintained by the State Election Commission for the purpose of paid political advertising. In this area, the contrast between formal registration and election practice is particularly revealing. Although around 100 online media outlets meet professional registration criteria, roughly twice as many appeared during election periods in anticipation of public funding. During the most recent election cycle, 249 online portals were registered for this purpose. Online media alone received around EUR 811,013 in public funding during the 2024 parliamentary elections, while the total for the presidential and parliamentary campaigns was estimated at around EUR 2 million.

This gap between professional registration and eligibility for election-related funding has important consequences. It encourages the creation of opportunistic media outlets, weakens incentives for editorial accountability, and facilitates the short-term instrumental use of media for political promotion. Planned legislative changes that would link eligibility for online campaign financing to inclusion in the professional register would therefore represent an important step forward (Metamorphosis Foundation & Osservatorio Balcani Caucaso Transeuropa, 2025). More broadly, the online media sector demonstrates how weak regulation can reinforce the politicised dynamic of a small media market: low barriers to entry create an appearance of pluralism, while the absence of robust professional standards makes manipulation easier.

Print Media: A Disappearing Format

Print media in North Macedonia have been steadily losing importance, largely as a result of digitalisation but also to the country's socio-economic and political conditions. Twenty-one print outlets are currently registered, yet only a few daily newspapers remain visible at the national level. The country's linguistic diversity and small population make it difficult to sustain more than one or two major daily newspapers in Macedonian and Albanian without incurring significant losses.

This viable fragility has direct political implications. Advertising is often the only realistic source of income capable of sustaining print outlets at scale, creating opportunities for political influence. Non-transparent ownership, financial vulnerability, and audience polarisation further reduce the prospects

for balanced reporting. The legacy of the Priebe reform agenda is relevant here as well, since international assessments linked media reform to broader rule-of-law deficiencies after the wiretapping scandal (Priebe, 2015). In other words, the decline of print media is not merely a consequence of technological change. It is also a story of how a weak market and a polarised political environment undermine the economic foundations of editorial independence.

Public Funding as a Structural Feature of the Media Model of North Macedonia

One of the most distinctive features of the Macedonian media system is the persistent role of public funding in the media market. In this sense, publicly funded support is not merely an external correction to the market but an integral part of the way the market operates. In a small and politically polarised environment, state resources do not function as neutral market instruments. They may shape competition, strengthen ties between political and media actors, and influence editorial decision-making. Their impact is greatest where commercial sustainability is already weak.

Government Advertising

Government advertising has long been one of the most controversial issues in North Macedonia's media landscape. Declining media freedom has repeatedly been linked to this practice in domestic and international monitoring reports. The European Commission's 2014 report on North Macedonia explicitly stated that government advertising was widely perceived as a form of indirect state control over media content (European Commission, 2014).

Between 2006 and 2016, under the VMRO-DPMNE-led government, the state became one of the largest advertisers through public campaigns, directing substantial funds to private television stations. Criticism from journalists' associations and civil society was unequivocal: state-funded marketing created financial dependence and distorted market competition (Association of Journalists of Macedonia, 2015). In 2018, amendments to the Law on Audio and Audiovisual Media Services introduced a ban on state-funded campaigns in private media. At this time, this appeared to be an important corrective measure.

However, in May 2024, shortly before the parliamentary and presidential elections, state-funded advertising was reintroduced by a new legal amendment. Journalist associations, the journalist trade union, and media organisations strongly opposed this measure, warning that it would preserve the existing structure of the media market through the continued use of public funds.

The expected allocation amounted to approximately 0.1% of the state budget, or approximately EUR 2.3 million. The significance of this decision extends beyond campaign communication. Once state institutions regain the ability to purchase visibility in private media, the boundary between public information and political influence becomes increasingly blurred. Under such conditions, financial dependence on state communication spending is more likely to encourage editorial caution and self-restraint.

Paid Political Advertising During Election Campaigns

Paid political advertising during election campaigns is regulated by the Electoral Code. The law grants electoral participants the right to paid media representation, requires media outlets to submit advertising rate cards, and provides for state budget financing of campaign advertising. These funds are formally allocated to political actors, who then purchase advertising space in the media during the campaign period, which ends 24 hours before election day. The process is supervised by the State Election Commission and the Agency for Audio and Audiovisual Media Services.

In legal terms, the system seeks to ensure fair access and transparency. In practice, however, it reproduces existing inequalities. The largest share of available funding is allocated to the major governing and opposition parties. In the 2024 presidential and parliamentary elections, around EUR 10.6 million was earmarked for this purpose. In a small media market, such sums are substantial enough to influence the behaviour of media outlets. The more media organisations come to rely on election periods as major sources of revenue, the more their economic priorities become aligned with the political calendars.

The problem is even more pronounced in the online media sector, where eligibility criteria have historically been weak and where large numbers of portals emerge immediately before elections. From a media management perspective, this creates a distorted incentive structure. Instead of rewarding investment in quality journalism, audience trust, and sustainable business models, the system rewards proximity to campaign funding. From a democratic perspective, the broader implication is a form of clientelism in which public funds intended to ensure political representation can instead normalise political dependence within the media sector.

Quality of Media Content

The sustainability of the media market is closely linked to the quality of media content. Research on the economic viability of the audiovisual sector

in North Macedonia shows that the largest private television broadcasters generate the highest revenues, yet not all are profitable, and most struggle to generate substantial income from digital platforms (Trpeska & Roksa-Zubcevic, 2023). Quality and editorial positioning are, therefore not abstract cultural concerns. They are directly tied to the economics of media production.

Most private broadcasters reduce production costs in order to survive, with inevitable consequences for content quality and diversity. National television stations are subject to more extensive legal obligations regarding programme structure, news production, and European works, while regional and local stations often provide more uniform and lower-quality programming. Local stations are particularly vulnerable. Limited revenues lead to cuts in current affairs programming, investigative content, and original content production. Unlike local media in some Western European countries, they do not benefit from stable public support mechanisms or protected local media markets.

This is important because content quality is one of the key links between the economic structure of the media market and its democratic function. When market pressures systematically push outlets toward low-cost entertainment and inexpensive studio formats, their capacity to cover environmental protection, the rule of law, European integration, or local accountability declines. Economic fragility is thus translated into a thinner public sphere.

Socio-Economic Position of Journalists

The socio-economic position of journalists in North Macedonia remains fragile, with direct implications for editorial independence. The *Shadow Report on Media Freedom in North Macedonia* indicates that journalists often work for low salaries, typically ranging from EUR 400 to EUR 650 per month, under conditions of considerable job insecurity (Metamorphosis Foundation & Osservatorio Balcani Caucaso Transeuropa, 2025). More than 55% of journalists earn less than the national average wage. Fixed-term contracts and part-time employment are common, and online media frequently operate under legally ambiguous employment arrangements.

The problem extends beyond low pay. Journalists also report unpaid overtime, weak enforcement of labour rights, and high levels of stress resulting from workplace bullying, gender-based violence, and political pressure. Attacks on journalists continued to be recorded in 2023 (Nikodinoska & Chausidis, 2025). Such conditions reduce professional autonomy because journalists who lack economic security are more vulnerable to pressure from media owners, political actors, and commercial interests. In this sense, labour insecurity becomes a structural constraint on media freedom.

Legal pressure reinforces this vulnerability. Recent assessments indicate continued exposure of journalists and media organisations to lawsuits and other forms of legal intimidation, while journalists' associations continue to document cases perceived as attempts to discourage investigative reporting (Metamorphosis Foundation & Osservatorio Balcani Caucaso Transeuropa, 2025; Nikodinoska & Chausidis, 2025). The impact of such cases cannot be measured solely by court outcomes. Their deterrent effect lies in the costs, time, and uncertainty imposed on journalists and independent media organisations. Without stronger collective protection, the profession remains vulnerable on both economic and legal fronts.

Discussion and Conclusion

The Macedonian media system can best be understood as a transitional system exhibiting strong features of polarised pluralism. The comparative frameworks developed by Hallin and Mancini and Dobek-Ostrowska help explain this classification, but the value of the present analysis lies in connecting those frameworks to concrete market practices in North Macedonia. The paper does not propose a new model of media systems. Rather, it demonstrates how, in a small media market, financial concentration, recurrent public funding, weak regulation of online media, politically sensitive ownership structures, and the precarious socio-economic position of journalists reinforce one another, translating political pressure into everyday media management practices.

These findings have broader implications for democracy. A weak public service broadcaster diminishes the availability of a stable public-interest benchmark. A commercial media sector dependent on state-funded campaigns or election-related spending is less able to resist political influence. Online media, established primarily to access campaign funding, distort the meaning of pluralism, while low-quality, low-cost production narrows the range of issues that receive sustained public attention. In such a setting, the challenge is not only how to keep media organisations financially alive but to sustain their public role under conditions that continually reward dependence.

Three broader implications emerge from these findings. First, a public-interest media environment requires predictable public service funding that is provided consistently rather than through unstable political bargaining. Second, the regulation of state advertising and paid political advertising is not merely a technical matter because, in a small media market, these flows of public funding can shape competition, foster dependence, and blur the boundary between public information and political influence. Third, economic diversification, stronger self-regulation, and more secure employment conditions emerge not simply as matters of managerial preference but as essential preconditions for professional autonomy.

These implications are particularly important for local and regional media, which remain the most fragile segment of the market. Where revenues are limited, resource-sharing arrangements, greater ownership transparency, and stronger collective protection for journalists become essential to long-term sustainability. More broadly, media quality, pluralism, and market sustainability cannot be treated as separate questions in North Macedonia because the same structural pressures shape all three simultaneously.

Ultimately, the challenge of media management in North Macedonia is inseparable from the broader challenge of democracy. In a small and politically polarised media market, media integrity is unlikely to be secured by market forces alone. It depends on credible regulation, professional solidarity, and organisational strategies capable of safeguarding editorial independence even when the political and economic environment rewards dependence.

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