

North Macedonia: Profile of Media Ownership and Potential Foreign Influence Channels

Emily Dumont, Jonathan Solis, and Lincoln Zaleski

Table of Contents

| | |
|-------------------------------|----|
| Introduction..... | 1 |
| Russian Media Footprints..... | 2 |
| Top Media Outlets..... | 3 |
| Media Ownership..... | 5 |
| Results..... | 7 |
| Television..... | 7 |
| Print..... | 9 |
| Radio..... | 10 |
| Online..... | 10 |
| Conclusion..... | 11 |

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Introduction

What are the entry points for foreign actors to shape and influence the narrative in the Macedonian media market? This profile seeks to address some of the entry points related to media ownership and Russian state-owned media. AidData recognizes that malign influence may affect narrative creation in other ways, including the republishing of foreign content in domestic media outlets, interactions on social media, and through journalist biases. However, this project focuses solely on direct and indirect ownership of traditional domestic media outlets to identify potential entry points for Russian influence through elites and media owners. By better understanding North Macedonia's domestic media ownership environment, including what media outlets citizens consume and who the owners of those outlets are, we can anticipate entry points where malign actors may try to influence domestic narratives.

North Macedonia remains one of the more transparent countries in the Europe and Eurasia region.¹ In 2013, North Macedonia implemented the Law on Media, which required the ownership of broadcast and print media to be made public. However, online media ownership is relatively opaque, as outlets remain exempt from reporting on their ownership structure. Since owners of top media houses have the potential to influence the content and tone of topics covered by journalists in their employ, understanding who owns the media is crucial to identifying avenues for influence and potential bias in reporting. In this profile, we begin to close this gap with an in-depth look at domestic media ownership in North Macedonia.

This media ownership profile and the supporting data were prepared by AidData, a research lab at William & Mary's Global Research Institute.² The data for this profile was collected manually by AidData staff and student research assistants. We began by conducting web searches to identify a list of media in North Macedonia, and then identified a list of the top-ranked outlets in terms of overall consumption. We then used this information to gather the ownership data. We used cross-country sources

¹ The Vibrant Information Barometer, "2021 North Macedonia Report," <https://www.irex.org/sites/default/files/pdf/vibe-north-macedonia-2021.pdf>.

² This profile is part of a collaboration with the USAID E&E Bureau made possible through a buy-in to a Higher Education Solutions Network cooperative agreement (AID-A-12-00096) in place between USAID/LAB/HESN, AidData, and William & Mary.

when available (e.g., Zenith, Alexa³), as well as the Central Registry of North Macedonia, media watchdog sources, and other open source data.

In the following sections, we provide summary data on the presence of Russian state-owned media, top outlets, and media ownership in North Macedonia as of 2021 (or the most contemporary data available). This profile focuses on the ownership of traditional broadcast, print, and online media outlets. Social media is not included in this analysis. By mapping out the ownership and influence of traditional forms of media, these profiles lend insights into potential channels for foreign influence in the top consumed outlets.

Russian Media Footprints

The most direct form of Kremlin influence in North Macedonia's media landscape is via Russian state-owned media (see Table 1). Five of the eleven Russian state-owned media outlets we tracked have a physical presence in North Macedonia, which provides the Kremlin with a few channels to directly communicate with, and ultimately influence, Macedonian citizens. Physical presence includes physical infrastructure, such as cable packages, physical office space or local bureaus, and radio broadcasters, but excludes satellite broadcasting and online or streaming availability. Table 1 provides a footprint of Russian state-owned media presence in North Macedonia, but does not speak to how well-consumed each outlet is by Macedonian citizens.

³ Zenith is a media intelligence database that provides insights into media, including television viewership and newspaper circulation, in several dozen countries around the world. Alexa is an online analysis tool. AidData staff used Alexa's API to gauge website traffic. <https://www.alexacom/siteinfo>.

Table 1: Russian state-owned media in North Macedonia, 2021

| Television | | Print | | Radio | | News Agency | |
|-------------|---|--------------------|---|---------|---|-------------|---|
| Russia I | ✗ | Rossiyskaya Gazeta | ✗ | Sputnik | ✗ | TASS | ✗ |
| Russia 24 | ✓ | | | | | Sputnik | ✓ |
| Russia K | ✗ | | | | | | |
| RTR-Planeta | ✓ | | | | | | |
| TV Centre | ✗ | | | | | | |
| Channel One | ✓ | | | | | | |
| RT | ✓ | | | | | | |

Other indirect forms of Russian influence are possible, including domestic outlets republishing narratives and pro-Russian journalists in-country. In this profile, AidData has captured direct Russian channels of influence through state-owned media infrastructure.

Top Media Outlets

Table 2 identifies the top five most-consumed media outlets in North Macedonia by medium (television, print, radio, and online) based on cross-sectional indicators such as viewership share and circulation. According to a 2021 International Republican Institute poll, television and online outlets are the top consumed mediums for information in North Macedonia and are therefore likely more influential, while radio and print media are less consumed.⁴ While we cannot know the exact influence of each individual outlet, we can assume that outlets that reach higher numbers of consumers have greater potential to influence more citizens. Despite the presence of some Russian

⁴ "Macedonia National Public Opinion Poll." International Republican Institute. Published June 16, 2021. https://www.iri.org/wp-content/uploads/legacy/iri.org/wysiwyg/iri_n_macedonia_march-april_2021_poll_june_2021.pdf

state-owned media outlets in North Macedonia, no Russian media appears in the top five outlets for any medium.

AidData used a weighted average of media consumption survey rankings from 2017 to 2021 to determine the top media outlets in North Macedonia. This strategy offers a more long-term perspective of top media outlets, rather than a snapshot of the top media outlets right now. As such, the top outlets may not exactly reflect the current order of the most-consumed outlets, but do show a solid picture of the media landscape over the past five years. Recent rankings are weighted more heavily to adjust for new changes.⁵

Table 2: Top Macedonian media outlets ranked by overall consumption

| Rank | Television | Print | Radio | Online |
|------|------------|------------------|-----------------------|--------------|
| 1 | TV Sitel | Sloboden pečat | Antena 5 | Time.mk |
| 2 | Kanal 5 | Večer | Channel 77 (Kanal 77) | Sitel.com.mk |
| 3 | TV Telma | Nezavisen vesnik | Radio Metropolis | kajgana.com |
| 4 | TV Alsat-M | Nova Makedonija | Macedonian Radio 1 | centar.mk |
| 5 | TV Alfa | Koha | Radio Bubamara | tv21.tv |

According to findings from an AidData survey of regional and local media experts in 2021, the majority of top Macedonian outlets mirror the results of open-source data collection by AidData researchers. However, additional outlets excluded from this top outlet list but ranked highly by local experts include the state-run television channel Macedonian Radio Television (MRT), radio station City FM 97.9, and online outlets Kurir.mk, Fokus.mk, and Sakam de Kazam (sdk.mk).

⁵ Television, Print and Radio: Television, radio and print rankings were calculated using multiple publicly available surveys and circulation data, including an AidData survey of country and regional experts conducted in summer 2021. Additional survey data came from: IREX's Media Sustainability Index (2019), Agency for Audio and Audio-visual Media Services of the Republic of Macedonia's Market Report (2020), Agency for Audio and Audio-visual Media Services of the Republic of Macedonia's Public Opinion Research (2017 and 2021), National Democratic Institute's Public Opinion Survey (2021), and International Republican Institute's Public Opinion Survey (2021).
Online: Alexa, April 2021

Media Ownership

Table 3 lists the ownership information of top Macedonian media outlets by medium (television, newspaper, radio, and online). Media ownership transparency in North Macedonia is regulated through the 2005 Law on Broadcasting Activity, the 2013 Law on Media, and the 2013 Law on Audiovisual Media Services. For radio and television outlets, the 2005 Law on Broadcasting Activity prevents political elites and their families from owning radio or television media. This restriction is expanded to the print media sector in the 2013 Law on Media and Law on Audiovisual Media Services. These laws are extensive and should theoretically create a highly transparent and public media space; however, these laws are often poorly implemented in practice. As stated in IREX’s Vibrant Information Barometer, “there are excellent freedom of information (FOI) legislation and strong regulations against media concentration. The problem, rather, is in the implementation of these laws and regulations.”⁶ Further examples of ownership ties and relationships are discussed in the following section.

In order to highlight which outlets may be more susceptible to Russian influence, AidData staff have devised a four-point scale to indicate levels of Russian ownership. This scale is color-coded shades of red in the table below to indicate 1) Direct Russian ownership, 2) Known Russian ties, 3) Suspected Russian ties, and 4) No Russian ties. Additionally, Macedonian state-owned media is color-coded blue. In North Macedonia, no owners had suspected or known ties to the Russian government, and no top outlets had direct Russian ownership. As such, this profile has no red color-coding and only one designation of state-owned media.

Table 3: Ownership of top Macedonian media outlets by share

| <div> <div>No Russian ties</div> <div>Suspected Russian ties</div> <div>Known Russian ties</div> <div>Direct Russian ownership</div> <div>Local state-owned media</div> </div> | | | | | |
|--|------|----------|----------------|--------------------|-----------|
| Medium | Rank | Outlet | Owner, Company | Owner, Individuals | Owner (%) |
| Television | 1 | Sitel TV | Monteko LLC | Goran Ivanovski | 100 |
| | 2 | Kanal 5 | Kanal 5 SMLLC | Emil Stojmenov | 100 |

⁶ The Vibrant Information Barometer, “2021 North Macedonia Report.”

| | | | | |
|-------|-------------------------|---|---|------------------------|
| Print | 3 Telma TV ⁷ | Makpetrol AD Stock Company | Publicly Traded Stock Andreja Josifovski (through OILKO Skopje) | <i>Unknown</i> 3.43 |
| | 4 TV Alfa | CHS Invest Group Ltd | Peter Schatz | 51.3 |
| | | | Goran Balac | 5.7 |
| | | Makosped JSC | Publicly Traded Stock | 14.3 |
| | | | Tome Kornakov | 2.7 |
| | | Technometal Vardar Inc | Publicly Traded Stock | 12.4 |
| | | | Dusko Angelov | 2.6 |
| | | Evropa Inc | Publicly Traded Stock | 9 |
| | | | Mila Leventic | 1 |
| | | | Esamedin Hasani | 1 |
| | 5 TV Alsat-M | VEVE Group Ltd Skopje | Imihane Velija | 88 |
| | | | Zana Velija | 11 |
| | | TRD Alsat-M | Ferik Velija | 1 |
| | 1 Sloboden pečat | Free Press LLC | Vladimir Galjak | 50 |
| | | | Miroslav Jovanovic | 50 |
| | 2 Večer | Vecer Press LTD | Saso Bogdanovski | 100 |
| | 3 Nezavisen vesnik | Independent Balkan News Agency LLC Skopje | Spiridon Sideris | 95 |
| | | | Nikolaos Fragopulos | 5 |
| | 4 Nova Makedonija | Repro One Ltd | Mincho Jordanov | 100 |
| | 5 Koha | Koha Production LLC | Lirim Dulov | 60 |
| | | | Arben Ratkocer | 40 |
| Radio | 1 Antena 5 | Antena 5 Radio Network | Zoran Petrov | 33.3 |
| | | | Marjan Gusev | 33.3 |
| | | | Kosta Janevski | 33.3 |
| | 2 Channel 77 (Kanal 77) | GBC Communications LTD | Viktor Gavrilov | 100 |

⁷ Telma TV is wholly owned by Makpetrol AD, a publicly traded oil company. However, ownership becomes highly circular after this point, making it extremely difficult to pinpoint individual shareholders and their respective shares. As a case in point, OILKO Skopje, another publicly traded company, owns 22.87% of shares in Makpetrol AD (as of April 15, 2019) President of the Makpetrol board Andreja Josifovski owns 14.98% of OILKO Skopje, the largest percentage for an individual in the company, giving him a 3.43% stake in Makpetrol. In turn, Makpetrol AD owns 35% stake in OILKO as well, meaning that both companies are invested in each other. No other company or individual owns more than 5% share in Makpetrol, meaning that their ownership is not published. Ultimately, the share of publicly traded stock is ambiguous, as OILKO and Makpetrol's percentages of private owners to public stockholders is unclear.

| | | | | |
|--------|----------------------|---|----------------------------|---------|
| Online | 3 Radio Metropolis | Metropolis Radio Network | Darko Gelev | 50.04 |
| | | | Mile Gjosevski | 49.96 |
| | 4 Macedonian Radio I | Government of North Macedonia | | 100 |
| | 5 Radio Bubamara | Trade Broadcasting Company - Bubamara LLC | Ranko Petrovic | 100 |
| | 1 Time.mk | Tajm-Borg LLC | Igor Trajkovski | 100 |
| | 2 Sitel.com.mk | Monteko LLC | Goran Ivanovski | 100 |
| | 3 kajgana.com | Kajgana Media LLC | Darko Lazarevski | Unknown |
| | | | Marjan Lazarevski | Unknown |
| | | | Dejan Petkovski | Unknown |
| | | | Darko Stoilevski | Unknown |
| | 4 centar.mk | Sky Press Ltd | Unknown | Unknown |
| | 5 tv21.tv | Company 21 | Aferdita Saraçini Kelmendi | 60 |
| | | | Eugen Saracini | 20 |
| | | | Florin Kelmendi | 10 |
| | | | Xheraldina Vula | 10 |

Results

Television

Television remains the most popular news medium in North Macedonia.⁸ The top most watched television channels consist of only private television channels, many of which are ultimately owned by larger joint stock companies and publicly traded corporations. For example, Telma TV is owned by Makpetrol AD, the largest oil distributor in North Macedonia, which trades on the Macedonian Stock Exchange. Similarly, a number of joint stock companies, including Makosped JSC, Technometal Vardar Inc, and Evropa Inc, own minority shares in TV Alfa. This complex ownership structure appears reminiscent of Western media ownership, with multiple independent minority shareholders and public corporations.

⁸ Macedonia National Public Opinion Poll." International Republican Institute. Published June 16, 2021.

However, despite TV Alfa's outwardly Western ownership structure, foreign owners control the television outlet. Peter Schatz, a Hungarian media executive and the majority shareholder of TV Alfa, is directly connected to Hungarian Prime Minister Viktor Orban's right-wing Fidesz Party. TV Alfa is aligned with the conservative VMRO-DPRO party, and Schatz's acquisition of TV Alfa in 2017 is a potential way for the right-wing Fidesz Party to bolster conservative ideologies in North Macedonia.⁹ Notably, the Government of North Macedonia charged Schatz's CHS Invest Group with tax evasion in 2021, highlighting the role of foreign corruption in the Macedonian media market.¹⁰

For television outlets with individual owners or families of owners, TV Sitel, Kanal 5, and TV Alsat-M round out the top television outlets in North Macedonia. TV Sitel is owned by soft-drink company Monteko LLC, wholly owned by Goran Ivanovski, the son of former Socialist Party of Macedonia leader and Member of Parliament Ljubisav Ivanov-Dzingo. Similarly, Kanal 5 is owned by Emil Stojmanov, the son of Member of Parliament and former leader of VMRO-DPRO Boris Stojmanov.

Notably, the Government of North Macedonia in 2012 instructed these two outlets to comply with the 2005 Law on Broadcasting Activity, which prevents the ownership of media outlets by the families of politicians. For TV Sitel, Ljubisav Ivanov-Dzingo retired from his parliamentary position to avoid prosecution; however, he was able to retain his status as leader of the Socialist Party of Macedonia.¹¹ For Kanal 5, a reportedly undisclosed sale of the television outlet occurred in 2012; however, according to recent Agency for Audio and Audiovisual Media reports, Emil Stojmanov is still the owner of Kanal 5.¹² Finally, TV Alsat-M is owned by the Velija family, divided into portions between the children of Alsat-M founder and Albanian media mogul Vebi Velija following his death in 2009.

⁹ Jovanovska, Maja, Tamas Bodoky, and Aubrey Belford. "Right-Wing Hungarian Media Moves Into the Balkans." OCCRP. Published May 9, 2018. <https://www.occrp.org/en/spooksandspin/right-wing-hungarian-media-moves-into-the-balkans>

¹⁰ "The company-owner of Alfa TV accused of tax evasion." Sloboden Pecat. Published April 1, 2021. <https://www.slobodenpecat.mk/en/firmata-sopstvenik-na-tv-alfa-obvineta-za-danochno-zatajuvane/>

¹¹ Petkovska, Biljana. "Ownership and Financial Models of the Most Influential TV-Channels in Macedonia, Croatia, and Slovenia." Macedonian Institute for Media: Skopje, 2021. https://mim.org.mk/attachments/article/1035/Ownership%20and%20financial_models%20of%20the%20most%20influential%20TV%20channels.pdf

¹² Agency for Audio and Audiovisual Media Services. "Report on Media Ownership." last edited June 2017. <https://avmu.mk/wp-content/uploads/2017/06/REPORT-ON-MEDIA-OWNERSHIP.pdf>

In contrast to the complex and diverse ownership of Telma TV, it is clear that other top television channels are at greater risk of political capture, as the sons of two party leaders own full stakes in top television outlets. In addition, while the laws on media ownership in North Macedonia are largely comprehensive, enforcement of the laws is not, as in the case of Kanal 5. Additionally, foreign influence is present in the Macedonian television sector, such as Hungarian ownership of TV Alfa.

Print

Print media ownership in North Macedonia follows a similar pattern to television, as private and foreign owners dominate the top five outlets. The most-circulated outlet in North Macedonia is Sloboden Pečat, owned by Free Press LLC. Vladimir Galjak, a prominent Serbian lawyer, and Miroslav Jovanovic, a Macedonian businessman, each own equal portions of Free Press LLC. Večer, the next most read outlet, is owned by Saso Bogdanovski, a Macedonian businessman. Little information outside of their ownership history is available for Jovanovic or Bogdanovski. Nezavisen Vesnik is part of the Independent Balkan News Agency network, which operates in many Balkan countries and is owned by two Greek citizens, Spiros Sideris, founder and editor-in-chief of IBNA, and Nikolaos Fragopulos. Koha is an Albanian daily newspaper, owned by two ethnic Albanian journalists in North Macedonia, Arben Ratkoceri and Lirim Dullovi.

The fourth-most read outlet, Nova Makedonija, is wholly owned by Repro One Ltd, a company registered in the British Virgin Islands without a named shareholder. However, in 2021, the British Virgin Islands mandated that all foreign entities registered there must name a final owner. After 22 years of unnamed ownership, former Deputy Prime Minister Mincho Jordanov was revealed to be the owner of Repro One Ltd, which owns companies in construction, real estate, and media.¹³

Like the television sector, foreign private owners play a role in print media, with investors from Greece and Serbia owning shares in top print outlets. Additionally, hidden ownership (similar to that of some top television outlets) can still be found in

¹³ "Минчо се пријави како сопственик на офшор-фирма со огромен имот." Fokus Media. Published May 7, 2021. <https://fokus.mk/mincho-se-prijavi-kako-sopstvenik-na-ofshor-firma-so-ogromen-imot/>

the Macedonian print media space. Hidden and foreign owners create potential vulnerabilities for Russian influence in both Macedonian print media and television.

Radio

Unlike television and print, top Macedonian radio stations are fully owned by domestic actors. Most top radio stations are privately owned, with the exception of state-owned Macedonian Radio 1. The top radio station in North Macedonia is Antena 5, a contemporary hit music station owned by co-founders Zoran “DJ Dynamite” Petrov, Marjan Gusev, and Kosta Janevski. The next top outlet, Kanal 77, is a news station owned and founded by GBC Communications LLC, wholly owned since 2013 by Viktor Gavrilov. Kanal 77 sometimes rebroadcasts Radio Free Europe segments.

The final two outlets are Radio Metropolis, owned by executive director Darko Gelev and Mile Gjosevski, and Radio Bubamara, owned by station director Ranko Petrovic. Both stations mostly broadcast music. AidData researchers found no indications of hidden ownership or foreign influence, with the exception of some rebroadcasts of Radio Free Europe, in Macedonian top radio outlets.

Online

Online outlets are not required to disclose their ownership in North Macedonia, obscuring who controls these channels. For example, the individual owner of Centar.mk is unknown, as are the breakdown of shareholder percentages for the owners of Kajgana.com. Nevertheless, some online outlets are more transparent than others.

The top visited online news outlet in North Macedonia is Time.mk, a news aggregation site owned and founded by Igor Trajkovski. A senior data scientist and researcher, Trajkovski created the site to draw headlines from all over the Internet. The second most-visited outlet is Sitel.com.mk, an online news site for TV Sitel whose ownership is discussed in the television section.

The third most-visited outlet is Kajgana.mk, co-founded and owned by Darko Lazarevski, Marjan Lazarevski, Dejan Petkovski, and Darko Stoilevski. Similar to Time.mk, Kajgana.mk is a web news portal and pulls from Macedonian-language

media. The site includes memes and gaming news in addition to regular news headlines, drawing a diverse audience.

Unlike online television channels or web portals, the fourth most-visited website, the online tabloid Centar.mk, does write and analyze its own reporting. Owned by the opaque Sky Press Ltd, Centar.mk, like many online tabloids, reports mostly on healthcare and pop culture, in addition to some political news.

Finally, RTV 21, an Albanian-language television station broadcasting from Pristina, Kosovo, has one of the top visited news sites in North Macedonia. Widely viewed by the ethnic Albanian population in North Macedonia, TV21.tv was created by Aferdita Saracini Kelmendi, her husband Florin Kelmendi, and her brother Eugen Saracini. Xheraldina Vula also owns a minority share in the company. The only apparent foreign influence in top online outlet ownership comes from ethnic Albanians in Kosovo. As noted before, there is a clear trend of foreign owners in the Macedonian media market, as well as some opaque ownership structures, highlighting potential vulnerabilities to foreign malign influence.

Conclusion

In this brief, we have presented an overview of the domestic media ownership environment of North Macedonia. The collected data highlight two trends in Macedonian media. First, Macedonian media ownership is generally transparent, though some risk of political capture exists. Second, while no owners have Russian ties, the Macedonian media market has some clear vulnerabilities to Russian influence.

Due to the public business register and reports from the Agency for Audio and Audiovisual Media Services, media ownership in North Macedonia is mostly transparent. Despite this transparency, there are some instances of political capture of the media, such as the children of politicians owning television stations or former Deputy Prime Minister Mincho Jordanov's ownership of media outlets through companies hidden in the British Virgin Islands. Additionally, online outlets do not have to report their ownership to the government, leading to opaqueness and potential vulnerabilities in media ownership online. While media transparency laws in North

Macedonia are largely comprehensive, enforcement of these laws is not, leading to a greater risk of hidden ownership with opportunities for political capture by forces foreign or domestic, particularly in the less transparent online mediums.

None of the top media owners in North Macedonia have clear ties to the Russian government. However, the significant presence of foreign ownership, including from Hungary, Kosovo, Greece, and Serbia, highlights a potential entry point for Russian influence. Openness to foreign ownership, coupled with the aforementioned trend of hidden ownership, provides potential vulnerabilities for Russian ownership in North Macedonia. Additionally, Russian state-owned media have a moderate presence in North Macedonia, with broadcasts of five state-owned television outlets available in the country. While Russia's international broadcasting is not highly viewed, it offers some opportunity to directly influence the Macedonian population. Furthermore, online television and web portals that grab headlines from all over the Internet are widely consumed in North Macedonia and Russian state-owned articles pulled through these outlets could offer a third channel of influence.

In sum, North Macedonia has some openings for Russian influence. While there are five present Russian state-owned outlets in North Macedonia, the potential repurposing of Russian state-owned content by local news aggregators allows Kremlin narratives to directly influence the Macedonian public. In addition, the dominance of foreign ownership and ownership by political elites provides vulnerabilities for potential Russian ownership or influence.