



# Field analyses

Monitoring the Local elections Outdoor political advertisement (Billboards)

Findings and Recommendations

IMPETUS

LOCAL ELECTIONS 2025

Report: February 2026



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## Abbreviations and terminology

SAO = State Audit Office

SEC =State Election Commission

SCPC =State Commission for Prevention of Corruption

RNM =Republic of North Macedonia

PRO =Public Revenue Office

EC= Electoral Code

PE =Public Enterprise

For the purpose of this research we shall use these terms :

**Billboard** - Billboards are panels, suitable for large-scale campaigns. Depending on the size, dimension, manufacturing and lighting they can also be named as Mega-lite, Big board, Megaboard, etc. (see page 10). Electoral content on billboards - is considered content that is designed for the purpose of paid political advertising and participation in the election campaign, representing the candidate, the slogan and the number of the ballot of the participant in the election campaign. It should also contain the name of the advertiser, i.e. the name of the person/entity who ordered that content.

**Electoral content** is used exclusively during the election campaign. Party content on billboards - is considered a content that aims for the party to communicate with the public and promote the party. It is not intended for the purpose of paid political advertising (during elections) and is in no way related to the election campaign.

**Party content** is advertised outside the election campaign period, but sometimes remains during the election campaign period.

**Black campaign on billboards** - is considered content, printed on a billboard that aims to denigrate, slander, degrade, harm. It appears during the election campaign, without knowing who set it up, or who paid for it.

**Billboard location** - the physical address/street map location where the technical stand of the billboard is actually located, including side A and side B of the same billboard. So there is one location, but two sides/two different contents of one billboard.

## Introduction

This report is prepared within the framework of the “Mapping Political Billboards 2025” initiative, implemented by IMPETUS – Center for Internet, Development and Good Governance (further in the text IMPETUS). The initiative combines systematic monitoring and digital mapping to document the use and distribution of political billboard advertising during the 2025 local election campaign in North Macedonia. The monitoring effort aims to increase transparency in election campaigning by identifying where political advertisements are placed, which actors are using outdoor advertising, and how visible campaign messages are distributed across different municipalities and public spaces.

The monitoring and mapping activities are conducted within the broader legal framework regulating political outdoor advertising, primarily defined by Article 78-a of the Electoral Code of the Republic of North Macedonia. This provision regulates the allocation and use of advertising panels and billboards during election campaigns, including limits on the share of advertising infrastructure that may be used for political promotion, procedures for allocating advertising locations, and reporting obligations for advertising companies and campaign participants.

It should be noted that Billboards represent one of the most visible forms of outdoor political advertising, typically positioned along major roads, intersections, and high-traffic urban areas, attracting the attention of both drivers and pedestrians. Although primarily used for commercial advertising, these structures are also widely utilized during election campaigns for political promotion. During election periods, these visual messages play a significant role in shaping voter perception, increasing candidate visibility, and reinforcing campaign narratives across urban and rural environments.

Also, the placement and leasing of billboard advertising locations are regulated through procedures established by municipalities and the City of Skopje. These locations are typically allocated to concessionaires or marketing agencies, which manage the advertising infrastructure and generate revenue by leasing advertising space to clients, including political actors during election periods.

Prior to the start of the election campaign, marketing agencies submit location and pricing packages to the State Election Commission (SEC). In accordance with Article 78-a of the Electoral Code, the maximum number of billboards that may be used for political advertising cannot exceed 50% of the total number of billboards available within a municipality or the territory managed by a specific concessionaire. The SEC allocates these advertising packages to electoral participants through a lottery system, ensuring formal equality among political actors. The Electoral Code further determines the percentage of billboards that each candidate, political party, or coalition may use. In cases where some participants do not utilize their full allocated share, the remaining advertising space may be leased by other electoral participants.

As part of the monitoring and mapping efforts for the 2025 local elections, IMPETUS developed an interactive online platform (<https://political-billboards.mk/>) that enables users to explore billboard locations and related campaign information through a searchable, visual interface. The platform combines geo-mapping, field monitoring, and analysis of the legal and institutional framework, providing an evidence-based overview of how outdoor political

advertising was used during the campaign. It also allows for comparative analysis with previous election cycles, offering insights into trends and developments over time and contributing to a clearer understanding of the scale, geographic distribution, and transparency of billboard advertising in the 2025 local elections.

Building on previous monitoring conducted in 2020 and 2021, the efforts conducted in 2025 were focused on the October 2025 local elections in North Macedonia, examining the use of billboard advertising throughout the campaign. The monitoring activities included assessing the location, visibility, and content of billboards, as well as compliance with the legal framework, particularly Article 78-a of the Electoral Code governing outdoor political advertising.

Through systematic monitoring and analysis, these efforts aimed to enhance transparency in political campaigning, provide evidence-based insights for policymakers and oversight institutions, and inform future improvements to the regulatory framework governing election advertising in North Macedonia.

About IMPETUS- Since 2020, the IMPETUS has been actively monitoring political advertising during election campaigns in North Macedonia, with a particular focus on outdoor advertising through billboards. During the parliamentary elections held in 2020, IMPETUS developed an interactive online map and analytical overview of political billboard advertising, which was published on the official project website. The findings stemming from 2020 efforts were bases for the IMPETUS to submit a set of recommendations and proposals to the State Commission for Prevention of Corruption (SCPC), advocating for clearer and more precise regulation of outdoor political advertising within the electoral legislation.

## **Monitoring Methodology**

### **Legal Framework**

The monitoring focused on the implementation of Article 78-a of the Electoral Code of the Republic of North Macedonia, which regulates the allocation, use, and financing of advertising panels and billboards during election campaigns.

To assess compliance with this provision, an evidence-based monitoring methodology was designed, tested, and implemented. The methodology is aligned with international election integrity and anti-corruption standards (OSCE/ODIHR and GRECO) and adapted to the national institutional context.

### **Methodological Approach**

The monitoring applied a mixed-method approach, combining:

- legal and desk review of institutional documentation
- structured field monitoring using the BMapper digital tool
- quantitative mapping of billboard locations and distribution
- qualitative analysis of campaign visibility and messaging
- comparative analysis with previous election cycles

The methodology was pilot-tested during fieldwork, refined through quality-control procedures, and finalized before the analytical phase.

## **Monitoring Objectives**

The monitoring aimed to:

1. Verify whether billboard advertising is allocated in accordance with Article 78-a.
2. Assess the transparency and timeliness of institutional publications related to billboard allocation.
3. Examine the consistency between allocated advertising locations and financial reporting and submission of reports.
4. Identify legal entities involved in the election campaign
5. Identify gaps in institutional coordination and oversight.
6. Document risks of unequal treatment, informal practices, or regulatory loopholes.

## **Monitoring Dimension: Institutional Transparency**

A key dimension of the monitoring assessed the availability and accessibility of public information related to billboard allocation.

Indicators included:

- publication of calls and offers from advertising companies
- publication of decisions of the SEC on allocated locations
- availability of documentation on official institutional websites
- timeliness of publication in relation to legal deadlines
- local municipalities transparency

Data sources included:

- official websites of the SEC, State Audit Office (SAO), and SCPC
- archived web content and screenshots
- requests for access to public information

The monitoring resulted in several analytical outputs, including:

- validated datasets and interactive visualizations
- criterion-based analytical reports
- comparative findings across election cycles
- evidence-based policy recommendations

These outputs contribute to policy dialogue, institutional accountability, and improved transparency of election campaign advertising in North Macedonia.

Below is a clear narrative explanation of Article 78-a of the Electoral Code of North Macedonia, focused specifically on billboards and advertising panels, including who has obligations and what those obligations are.

## Regulation of Political Advertising on Billboards and Advertising Panels

Article 78-a of the Electoral Code (EC) of North Macedonia regulates the use of advertising panels and billboards during election campaigns. The provision was introduced to create equal access to outdoor advertising space, improve transparency of political campaign spending, and reduce the risk of unfair campaign advantage or hidden financing<sup>1</sup>.

The article establishes rules on the allocation, use, reporting, and oversight of billboards used for political advertising during elections. According to the SEC's Instructions Manual, based on implementation of Article 78-a from EC, bidders' packages are distributed according to the criteria:

✓ Package 1 – 40% of the locations are intended for the two largest political parties in power that won the most votes in the last parliamentary elections;

✓ Package 2 – 40% of the locations are intended for the two largest opposition political parties that received the most votes in the last parliamentary elections;

✓ Package 3 – 10% of the locations are available to the political parties that do not have parliamentary groups in the Assembly of RNM;

✓ Package 4 – 10% of the locations are available to non-parliamentary parties and independent candidates in RNM.

1. Legal framework: Article 78-a is designed to ensure fair access to outdoor advertising, transparency of campaign spending, and oversight of political influence in public space during elections. This article also ensures governance objectives.

Furthermore, the EC sets a quantitative limit on the number of billboards for political advertising including the following:

- No more than 50% of the total number of billboards or advertising panels available within a municipality (or the territory managed by a concessionaire) may be used for political advertising during the election campaign. This rule aims to:
  - prevent dominance of public space by political campaigns
  - ensure availability of advertising space for commercial use
  - reduce the possibility that wealthier parties monopolize billboard infrastructure.

However, it is very difficult to establish whether this percentage is respected due to not having local registries of locations and billboards that are used at the local municipal level.

2. Allocation of Billboard Locations - Before the election campaign begins:

- Legal entities managing billboard infrastructure (advertising companies or concessionaires) prepare packages of billboard locations with prices.

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<sup>1</sup> [https://www.te.gob.mx/vota\\_elections/thesaurus/article/27426/16275/139](https://www.te.gob.mx/vota_elections/thesaurus/article/27426/16275/139)

- These packages are submitted to the SEC.

The SEC then distributes the billboard packages through a lottery procedure among the participants in the election campaign. This system is intended to ensure:

- fairness among political actors
- equal opportunity to access advertising locations
- transparency in the allocation process.

### 3. Distribution of Billboard Space Between Campaign Participants

The Electoral Code further regulates how billboard space is distributed among political actors. Participants in the election campaign include:

- political parties
- coalitions
- independent candidates

Each participant receives a defined percentage of available billboards, determined under the Electoral Code and distributed through the SEC lottery system. If a participant does not use the full allocated percentage, the remaining billboards may be leased by other campaign participants. There is no strict procedure regulating this issue. Therefore, participants can easily exceed the number and percentage as specified in the article 78-a. This finding was confirmed by IMPETUS in the local elections monitoring cycle of 2021.

4. Obligations of Advertising Companies (Billboard Operators) - Legal entities that manage billboards and advertising panels (marketing agencies or concessionaires) have several legal obligations.

They must:

- Submit information to the SEC regarding:
  - the locations offered for political advertising
  - the prices for those locations.
- After the election campaign, submit a detailed report containing:
  - which billboard locations were allocated
  - which campaign participant used each location
  - the funds requested from each participant
  - the funds actually received.

This report must be submitted within 15 days after the end of the campaign. The report is delivered to:

- State Election Commission
- State Audit Office
- State Commission for Prevention of Corruption.

5. Obligations of Oversight Institutions - Several institutions have oversight responsibilities related to Article 78-a.

SEC is responsible for:

- receiving billboard location offers from advertising companies
- allocating billboard packages to campaign participants, based on the offer from the marketing companies
- ensuring compliance with allocation rules.

SAO is responsible for:

- auditing election campaign financing
- verifying whether billboard spending corresponds to financial reports.

SCPC is responsible for:

- monitoring risks of corruption
- identifying irregularities in campaign financing and advertising.

These institutions must also publish the reports received from advertising companies on their websites, ensuring public transparency.

6. Obligations of Campaign Organizers (Political Parties and Candidates) - Political parties, coalitions, and independent candidates who participate in elections must:

- use billboards only within the allocated percentage and locations
- report all billboard advertising expenses in their campaign finance reports
- respect campaign finance limits and transparency requirements.

Campaign organizers must submit financial reports during and after the campaign, detailing their revenues and expenditures, including billboard advertising costs.

7. Enforcement and Sanctions - The Electoral Code contains rules governing election campaign financing and reporting, including expenses related to outdoor advertising such as billboards. However, the regulation of billboard allocation and oversight remains only partially defined, which has created a regulatory grey area in practice. Potential violations may include:

- exceeding the permitted campaign advertising arrangements,
- failure to report billboard advertising expenses in campaign finance reports,
- submission of false or incomplete financial information,
- failure of advertising companies to provide required information on billboard allocation.

Administrative sanctions may include fines for legal entities and responsible persons under the Electoral Code and related regulations. In cases involving unlawful campaign financing, false reporting, or misuse of funds, criminal liability may arise under the Criminal Code.

There is no registry of such fines imposed due to these violations.

## Data Analysis - Findings

The data presented and analysed in this report refers to 713 billboards from 103 candidates and 14 political parties.

A total of 713 billboards were placed across 594 locations nationwide, from 36 municipalities and 2 highway road corridors. This indicates that 119 locations (20%) featured two advertisements, corresponding to billboards with two sides (Side A and Side B). A total of 13 political parties and coalitions rented billboard space, along with one independent candidate, who used a single billboard.

In total, 103 mayoral candidates and 15 candidates for municipal councils accounted for 594 advertising billboards, while the remaining 119 billboards carried general party-related content. Of the 713 political billboards, 76.7% promoted mayoral candidates, 6.6% promoted council candidates, and 16.7% featured party advertising.

## Party Dominance and Resource Mobilization

The analysis of political billboards for the 2025 Local Elections reveals a pronounced concentration of resources and a highly stratified visual dominance in public space.

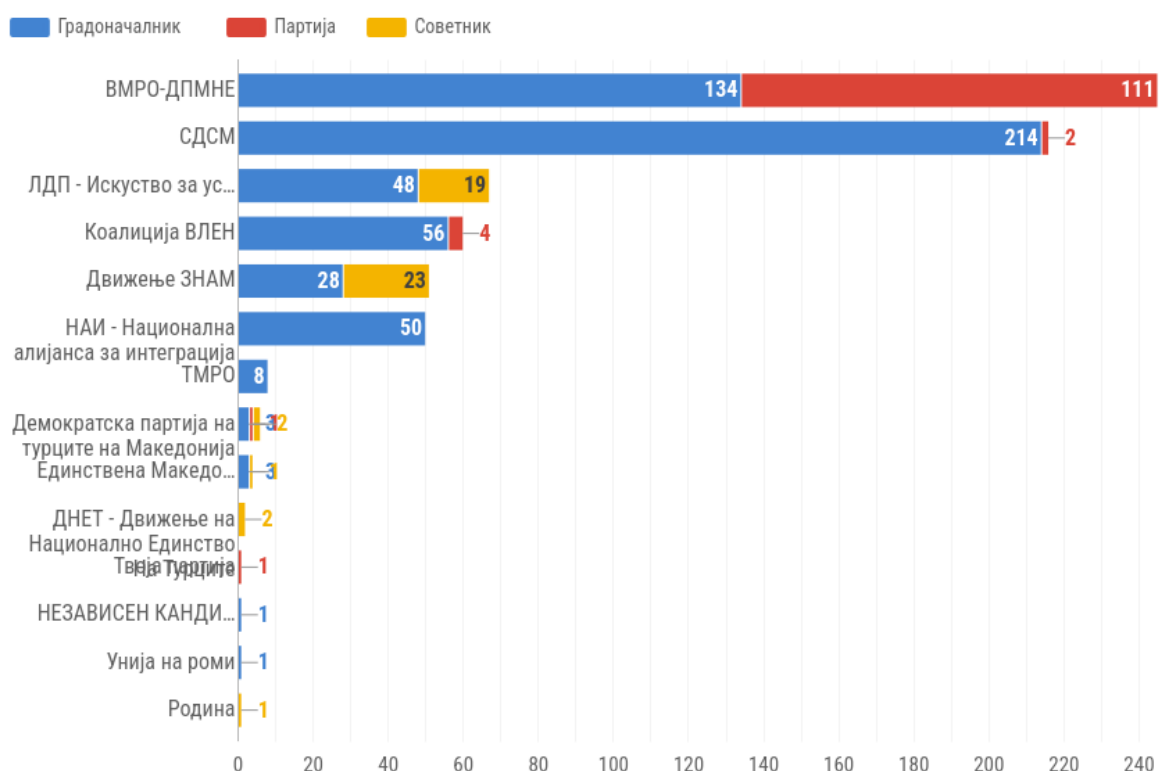


Figure 3. Distribution of billboards by political party cross-tabulated with content type

Billboards of the coalitions led by VMRO-DPMNE and SDSM account for 65% of the total number of recorded advertisements (245 and 216 billboards, respectively). This dominance is not merely numerical; it is also reflected in the quality and visibility of locations. While smaller

political actors rely primarily on standard advertising billboards, the two leading coalitions enjoy exclusive access to premium advertising surfaces, such as building façades and video screens, further reinforcing their visual dominance.

In addition to party concentration, the data also reveal a pronounced geographic imbalance: 61% of all billboards are located within the territory of Skopje, and as many as 72% of all billboards are concentrated in just five municipalities. This clearly indicates that campaign strategies are oriented toward achieving visual dominance in urban environments, where the most frequented locations become the core arenas of political competition.

<b>Political Party / Coalition</b>	<b>Mayoral Candidates</b>	<b>Council Candidates</b>	<b>Party Content</b>
<b>SDSM</b> (Social Democratic Union of Macedonia)	214	0	2
<b>VMRO-DPMNE</b>	134	0	111
<b>VLEN Coalition</b>	56	1	4
<b>NAI – National Alliance for Integration</b>	50	0	0
<b>LDP – Experience for Success</b>	48	19	0
<b>ZNAM Movement</b>	31	23	0
<b>TMRO</b>	8	1	0
<b>United Macedonia</b>	3	1	0
<b>Democratic Party of Turks in North Macedonia</b>	3	2	1
<b>Union of Roma</b>	1	0	0
<b>Independent Candidate</b>	1	0	0
<b>Your Party</b>	0	0	1
<b>Rodina</b>	0	1	0
<b>Movement for National Unity of Turks</b>	0	2	0
<b>Grand Total</b>	<b>549</b>	<b>50</b>	<b>119</b>

*Table 1: Distribution of Billboards by Political Party and Type of Political Subject*

The visual imprint in public space reflects two clearly distinct campaign philosophies with regards to the advertised content on the billboards. VMRO-DPMNE employs a mixed strategy focusing both on the candidates 55% and 45% of the billboards dedicated to general party advertising. Contrary to this, the billboard content of the SDSM focuses 99% exclusively on promoting the candidates. This reflects a deeper difference in the source of political legitimacy: VMRO-DPMNE builds trust through the institutional party brand, whereas SDSM personalizes its campaign around local candidates.

Mid-sized political actors (LDP, VLEN, the ZNAM Movement, NAI) demonstrate a noticeably smaller yet still visible presence, with 50–70 billboards each. These parties possess stable organizational structures and sufficient financial capacity to maintain visibility across multiple municipalities, but not to achieve systematic coverage of the entire territory. Other parties, particularly non-parliamentary parties/coalitions, face marginal representation, with fewer than 10 advertising surfaces, rendering them almost invisible within the campaign’s visual landscape.

Joint advertising of two candidates was recorded on seven billboards, most commonly featuring a mayoral candidate together with the lead candidate on the council list (presented

on the table above). These cases were observed during field monitoring (VMRO-DPMNE – on a building façade, SDSM, ZNAM, the VLEN Coalition, and TMRO).

The data shows that the visual campaign space is heavily concentrated among two major political actors, with SDSM and VMRO-DPMNE accounting for more than 64% of all recorded billboards, illustrating the structural advantage of larger political parties in outdoor political advertising.

## Geographic distribution of the billboards

Billboards were recorded in 26 municipalities plus the City of Skopje (which includes all 10 Skopje municipalities), while no billboard locations were identified in the remaining 44 municipalities. Ten out of fourteen advertisers (political parties) rented billboard space in the capital city.

The City of Skopje clearly dominates in terms of the number of rented billboards, with 463 advertisements, followed by Tetovo (43), Strumica (21), and Kumanovo (21). Within Skopje, similarly to the nationwide pattern, the coalition led by VMRO-DPMNE accounts for the largest number of rented billboards.

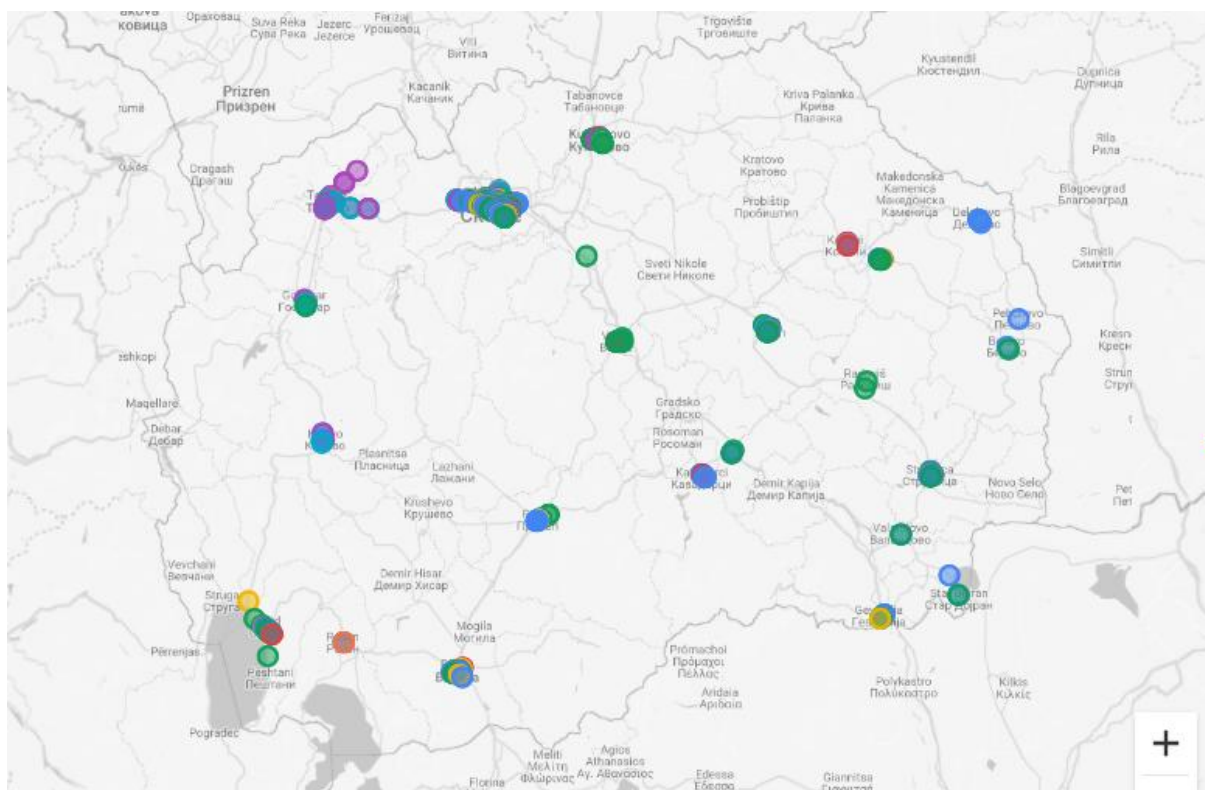


Figure 4: Distribution of rented billboards across the territory of the country

In Skopje, three municipalities: Centar, Karposh, and Aerodrom, have the largest number of recorded billboards. These areas function as highly visible “political screens,” where major traffic corridors, roundabouts, and intersections contain a high density of outdoor advertisements.

Many billboard locations are positioned near roundabouts, major boulevards, and points of slowed traffic flow, which naturally increases their visibility to passing traffic. While political

actors choose from the advertising surfaces available to them, the placement of billboard infrastructure itself is largely determined by municipal planning decisions and agreements with advertising companies. The observed concentration therefore reflects both the structure of the available advertising infrastructure and the high visibility of these urban spaces. These findings suggest that future regulatory discussions could consider how municipalities determine which advertising locations are made available during election campaigns, in order to avoid excessive concentration of political advertising in highly visible public spaces.

For example, billboards located at the roundabout near the Catholic Church appear as one of the most frequently selected locations by different political parties, suggesting a shared perception of this site as a “premium” location for political visibility.

Each billboard has a unique physical location, while the billboard structure itself may have one, two, or multiple sides. Side A (facing against the direction of traffic flow) achieves the highest visibility for both pedestrians and drivers, whereas Side B (facing the direction of traffic flow) is more visible to traffic approaching from the opposite direction. In the case of these elections, although the difference is relatively small, Side A was rented more frequently (56.2%).

According to the price lists of marketing agencies, renting Side A is more expensive than renting Side B, which is logically consistent with its higher visibility. Nevertheless, Side B remains a significant part of the media landscape, particularly for parties with a larger number of advertisements.

The data indicate a clear but moderately expressed tendency among most political actors to favor Side A, pointing to a strategic orientation toward more visually advantageous positions. The strongest dominance of Side A is observed among parties with a smaller number of billboards (United Makedonia, Rodina, Your Party), where all advertisements are placed exclusively on Side A.

Among larger political actors, the trend is more nuanced: VMRO-DPMNE shows a clear preference for Side A (57.6%), while SDSM is almost evenly distributed (51.9% on Side A). A notable exception is TMRO, which is the only party where Side B holds a strong majority (75%).

Political Party	Side A	A %	Side B	B %
<b>VMRO-DPMNE</b>	141	57.6%	104	42.4%
<b>SDSM</b> (Social Democratic Union of Macedonia)	112	51.9%	104	48.1%
<b>LDP – Experience for Success</b>	38	56.7%	29	43.3%
<b>VLEN Coalition</b>	32	53.3%	28	46.7%
<b>ZNAM Movement</b>	35	68.6%	16	31.4%
<b>NAI – National Alliance for Integration</b>	30	60.0%	20	40.0%
<b>TMRO</b>	2	25.0%	6	75.0%
<b>Democratic Party of Turks in North Macedonia</b>	4	66.7%	2	33.3%
<b>United Macedonia</b>	4	100.0%		
<b>DNET – Movement for National Unity of Turks</b>	1	50.0%	1	50.0%
<b>Union of Roma</b>			1	100.0%

<b>Your Party</b>	1	100.0%		
<b>Rodina</b>	1	100.0%		
<b>Independent Candidate</b>			1	100.0%
<b>Total</b>	<b>401</b>	<b>56.2%</b>	<b>312</b>	<b>43.8%</b>

Table 2: Overview of Side A / Side B Billboard Leasing by Political Party / Coalition

Municipalities with lower traffic intensity have a significantly smaller number of advertisements, indicating that political parties invest selectively in locations with the highest “return on attention.” In less urbanized municipalities, the number of billboards is lower, but general party advertisements are more frequent, suggesting that parties seek to establish a basic presence without investing in personalization through individual candidates. This clearly signals their assessment of the electoral weight of these municipalities.

Political parties also selectively avoid certain geographic areas where they assess their chances of success being low. This is particularly pronounced among SDSM and opposition parties, resulting in a mosaic of “zones of influence” rather than a uniform national presence. Highly visible locations are almost exclusively reserved for dominant political actors, creating the impression that electoral competition takes place primarily in visually oversaturated urban areas. Smaller parties are almost entirely absent from these “prime locations,” reinforcing the existing political hierarchy and reducing diversity in public space.

Non-ethnic Macedonian parties (NAI, DPTM, DNET) display a clear geographic concentration in municipalities with a significant non-ethnic Macedonian population. Most notably, NAI places 22 out of its 23 billboards in Tetovo, Gostivar, and Kičevo, confirming a strategy focused on consolidating its traditional electoral base rather than expanding into new territories. Overall, 92% of billboards of non-ethnic Macedonian parties are concentrated in just four municipalities.

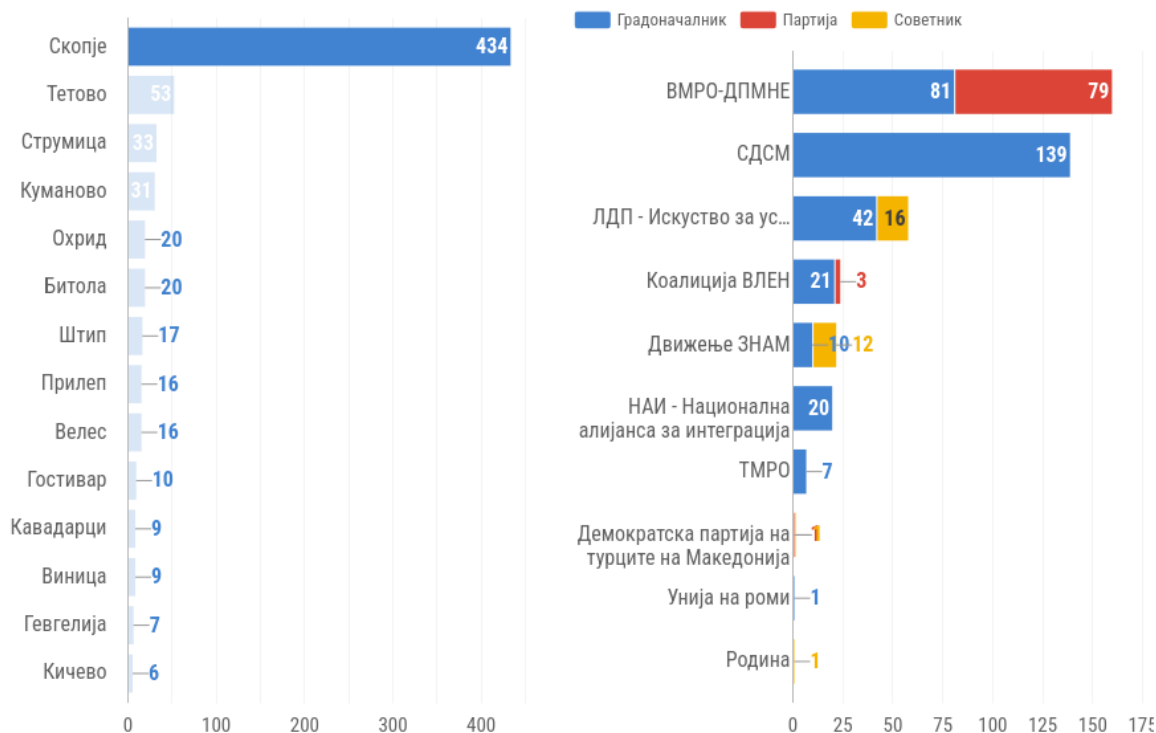


Figure 5: Overview of billboard leasing by municipality, with a focus on Skopje and the distribution of leases by party and content type within the city

A high concentration of VMRO-DPMNE billboards was observed along Skopje’s main entry and exit routes. This creates an impression of “welcome and farewell” framed within a party environment, a technique often used to convey a sense of mass presence and dominance. SDSM, on the other hand, more frequently appears with candidate-focused advertisements in urban centres, which may indicate a strategy oriented toward symbolic visibility in densely populated neighbourhoods.

## Gender Representation in Visual Political Communication

The analysis of gender representation in political advertising reveals a complex gender imbalance rooted at multiple levels of the political system. Out of a total of 599 recorded candidate-related billboards (for both mayor and council members), male candidates dominate with 485 billboards (81%), while women candidates are represented on only 114 billboards (19%).

	candidates	women	women %	Men	Men %
Mayoral	309	32	10.4%	277	89.6%
Council	10499	4737	45.1%	5762	54.9%

Table 3: Data on List Status and Number of Mayoral and Council Candidates in Political advertising

Gender	Billboards for Mayors	Mayors %	Billboards for Council members	Council candidates %	total	Total%
Men	444	80.87%	41	82.00%	<b>485</b>	<b>81%</b>
Women	105	19.13%	9	18.00%	<b>114</b>	<b>19%</b>
<b>Total</b>	<b>549</b>	<b>100%</b>	<b>50</b>	<b>100%</b>	<b>599</b>	<b>100%</b>

Table 4: Cross-tabulation of Data by Gender and Mayoral and Council Candidates

Gender	Candidates for Mayors	Mayors %	Candidates for Council members	Council members %	total	total %
Men	87	85.29%	16	88.89%	<b>103</b>	<b>85.8%</b>
Women	15	14.71%	2	11.11%	<b>17</b>	<b>14.2%</b>
<b>Total</b>	<b>102</b>	<b>100.00%</b>	<b>18</b>	<b>100.00%</b>	<b>120</b>	<b>100%</b>

Table 5: Cross-tabulation of Data by Gender and Mayoral and Council Candidates

Gender imbalance varies significantly across different types of candidates. Among mayoral candidates, women account for only 10.4% of the total (32 out of 309), indicating a structural problem in party nomination processes. In contrast, candidate lists for municipal councils show near gender parity, with 45.1% women (4,737) and 54.9% men (5,762) out of a total of 10,499 candidates, reflecting the impact of the legally mandated gender quota.

However, this gender balance among council candidates is not reflected in the visual campaign. Billboards promoting council candidates are highly marginal (only 6.7% of all candidate-related billboards), and among this limited number of advertisements, women account for only 18% (9 out of 50 billboards). This results in a double marginalization: council candidates are largely invisible in the campaign overall, and female council candidates are further marginalized.

With regard to mayoral candidates, out of 549 billboards, 105 promote women (19.1%) and 444 promote men (80.9%). Of the 103 mayoral candidates featured on billboards, 15 are women (18.8%), while among 20 council candidates with billboards, only 3 are women (20.4%). Among the top 14 mayoral candidates with the highest number of billboards, only two are women (14.3%).

A more detailed analysis of resource allocation reveals a nuanced and somewhat unexpected picture. Of the 32 female mayoral candidates, 15 have billboards (46.9%), compared to 88 out of 277 male candidates (31.8%). In addition, the average number of billboards per female mayoral candidate is 7.0, compared to 5.04 for male candidates. A similar pattern is observed among council candidates, with an average of 3.3 billboards per female candidate, compared to 2.4 per male candidate.

This suggests a specific campaign strategy: when parties decide to promote a female candidate, they tend to invest more resources in her visibility, possibly reflecting an awareness of the need for positive discrimination, or the fact that only the strongest female candidates receive nominations. Nevertheless, the fundamental issue remains that women are severely underrepresented among mayoral candidates, resulting in their marginal overall visual presence in the campaign (only 19.2% of all billboards).

Although expressed to varying degrees, male dominance is present across all major political parties. Within VMRO-DPMNE, women appear as candidates in only 12% of cases, while SDSM shows a higher share (28%), yet still reflects a substantial imbalance. The ZNAM Movement is the only party demonstrating a relatively balanced approach, with 42% women. Cross-tabulation between party affiliation and gender representation reveals that gender imbalance persists across nearly all political actors, regardless of ideological orientation or political platform.

A further dimension of gender imbalance can be observed among non-ethnic Macedonian parties and coalitions. Out of 120 candidates from these political actors who appeared on billboards, only 17 are women (14.2%), while 103 are men (85.8%). Among mayoral candidates in these parties, women represent 14.7% (15 out of 102), and among council candidates only 11.1% (2 out of 18). This share is notably lower than the overall female representation in billboard advertising (19%), indicating that gender disparities may be even more pronounced within certain party families. The findings suggest that while gender quotas contribute to greater balance in council candidate lists, these mechanisms do not translate into equal visibility in campaign advertising across all political actors.

An additional pattern emerges when examining the distribution of advertising resources among candidates. Although women remain significantly underrepresented among mayoral candidates, those who do receive nominations appear to benefit from relatively greater campaign visibility. Among the 32 female mayoral candidates, 15 are promoted through billboards (46.9%), compared to 88 out of 277 male candidates (31.8%). Furthermore, the average number of billboards per female mayoral candidate is 7.0, compared to 5.04 for male candidates. A similar pattern is observed among council candidates, where female candidates average 3.3 billboards compared to 2.4 for male candidates. This suggests that when parties decide to promote female candidates, they often invest more heavily in their visibility,

potentially reflecting a strategy of selective promotion of the most competitive female candidates.

Indicator	Women	Men
Mayoral candidates with billboards	46.9%	31.8%
Average billboards per mayoral candidate	7.0	5.04
Average billboards per council candidate	3.3	2.4

Gender inequality in political advertising is therefore a symptom of structural issues operating at multiple levels. Among mayoral candidates, the core problem does not lie primarily in the allocation of advertising resources, female candidates who are nominated tend to receive comparatively stronger promotional support, but rather in the nomination processes, where women remain fundamentally underrepresented.

In the case of council candidates, although the legal quota ensures near gender parity among nominees (45% women), this balance is not reflected in the visual campaign. Political parties invest very little in promoting council lists overall (whether male or female); however, when such promotion occurs, male candidates again dominate, accounting for 80% of billboards for council candidates. This indicates that even when women are present as candidates in line with legal requirements, their visibility in public space remains secondary.

## **Content Type and Campaign Focus**

### **Content of Billboard Messaging**

The content of billboard advertising during the campaign was predominantly positive and programmatic in tone. Rather than relying on negative rhetoric or direct attacks against political opponents, most billboards focused on promoting policy priorities, development promises, and quality-of-life improvements. Messages frequently addressed specific voter groups, including young people, pensioners, and families, emphasizing themes such as economic opportunities, social support, infrastructure development, and improved public services. This suggests that outdoor advertising was primarily used as a tool for positive political branding and candidate promotion, rather than for confrontational or negative campaigning. The absence of strong negative messaging may also reflect the nature of billboard advertising itself, which favors short, positive slogans and candidate recognition rather than complex or confrontational political messaging.

The distribution of content types reveals a fundamental divergence in campaign strategies between the two leading political coalitions. Although the difference in the total number of rented billboards is relatively small (VMRO-DPMNE: 245; SDSM: 216), the manner in which these billboards are used differs markedly. VMRO-DPMNE dedicates 54.7% of its billboards (134 out of 245) to candidate promotion, while 45.3% are used for general party advertising.

In contrast, SDSM focuses almost exclusively on candidates: 99.1% of its billboards (214 out of 216) promote candidates, with only 0.9% devoted to party advertising.

This reflects a deeper divergence in how political actors perceive the sources of political trust and legitimacy. VMRO-DPMNE builds legitimacy through institutional trust, positioning the party brand as the primary guarantor, while SDSM emphasizes personal credibility and local experience of individual candidates. VMRO-DPMNE's approach creates a "network effect," whereby stronger candidates reinforce weaker ones through a consolidated party brand, whereas SDSM relies almost entirely on the individual appeal of each candidate.

Billboards predominantly promote mayoral candidates, confirming this category as strategically the most important for political parties, while council lists remain marginalized in visual promotion. Out of a total of 713 candidate-related billboards, only 51 (7.15%) promote council candidates. In many municipalities, advertising for council lists is virtually absent, revealing a structural gap in local political communication.

In total, 102 mayoral candidates are promoted through billboards, compared to only 18 council candidates (see Table 5). SDSM has the highest number of mayoral candidates with billboards (27), followed by VMRO-DPMNE with 24. Among council candidates, LDP stands out with six candidates promoted via billboards, while VMRO-DPMNE has no billboard advertising for council candidates.

Kaja Shukova (SDSM) emerges as by far the most heavily promoted candidate, with 65 billboards, representing an exceptional concentration of resources behind a single individual. This figure is nearly 50% higher than that of the second most promoted candidate (Orce Gjorgjievski, with 46 billboards). Shukova accounts for 11.4% of all SDSM billboards promoting mayoral candidates, while the most advertised VMRO-DPMNE candidate (Gjorgjievski) accounts for 8.1% of the party's candidate-related billboards.

Within the top 15 most advertised mayoral candidates (those with more than 11 billboards each), SDSM and VMRO-DPMNE each have four candidates, followed by the VLEN coalition, NAI, and Experience for Success (LDP) with two candidates each, and the ZNAM Movement with one candidate. VMRO-DPMNE applies a strategy of more evenly distributed resource allocation across several key candidates, resulting in a less concentrated but more broadly spread approach compared to SDSM.

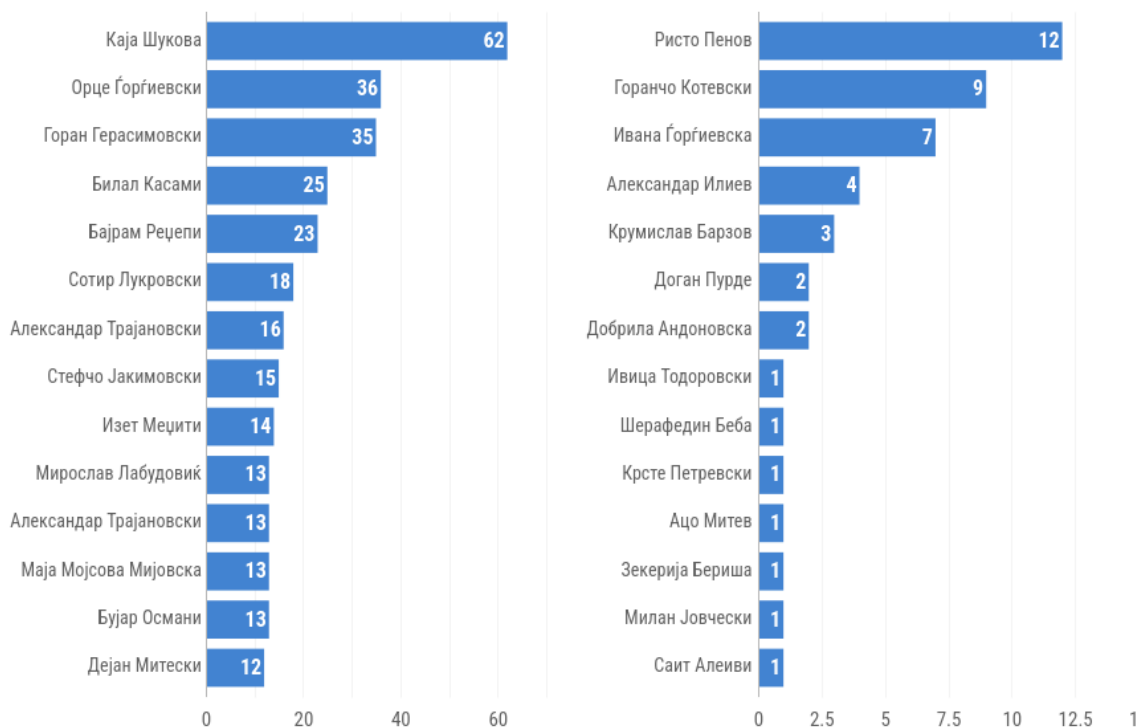


Figure 6: Mayoral candidates (left) and council candidates (right) with the highest number of billboards

Among council candidates, the individual with the highest number of billboards comes from the Experience for Success coalition (led by LDP). Risto Penov stands out with 12 billboards, which is significantly above the average for council candidates and represents a clear exception to the general marginalization of this category in visual campaign advertising.

Party / Coalition	Mayoral candidates	Council candidates
<b>SDSM (Social Democratic Union of Macedonia)</b>	27	1
<b>VMRO-DPMNE</b>	24	0
<b>VLEN Coalition</b>	12	1
<b>LDP – Experience for Success</b>	11	6
<b>ZNAM Movement</b>	10	4
<b>NAI – National Alliance for Integration</b>	8	0
<b>TMRO</b>	3	1
<b>Democratic Party of Turks in North Macedonia</b>	3	2
<b>United Macedonia</b>	2	1
<b>Union of Roma</b>	1	0
<b>Independent Candidate</b>	1	0
<b>Your Party</b>	0	0
<b>Rodina</b>	0	1
<b>DNET – Movement for National Unity of Turks</b>	0	1
<b>Total</b>	<b>102</b>	<b>18</b>

Table 6: Number of Mayoral and Council Candidates by Political Party / Coalition

## Infrastructure Diversity

### Spatial Distribution of Billboard Advertising

The mapping of billboard locations indicates a strong concentration of political advertising within the central areas of municipalities and along the main urban traffic arteries. Most billboards are positioned on major boulevards, central intersections, and roundabouts where traffic density is high and vehicles frequently slow down or stop. These locations provide repeated visual exposure to commuters and pedestrians and therefore represent highly valuable advertising spaces.

In contrast, relatively few billboards were observed on highways or roads outside urban centers. This pattern suggests that campaign visibility is primarily oriented toward densely populated urban zones and daily commuter routes rather than long-distance transit corridors. As a result, the visual campaign landscape is most pronounced in municipal centers, where political messages become a constant element of the everyday urban environment.

The distribution of political advertising across different types of outdoor media shows a strong dominance of traditional billboards, which account for 713 out of a total of 746 recorded advertising surfaces (95.6%). This is expected given their wide availability and relatively lower costs.

However, the use of alternative media formats, such as building façades (22), video screens (3), and bridges (8), reveals strategic positioning and significantly greater financial capacity among the most dominant political actors.

Party / Coalition	billboard	Video screen	Building	Bridge
<b>VMRO-DPMNE</b>	245	2	13	1
<b>SDSM (Social Democratic Union of Macedonia)</b>	216	1	6	3
<b>LDP – Experience for Success</b>	67			3
<b>VLEN Coalition</b>	60		2	
<b>ZNAM Movement</b>	51		1	
<b>NAI – National Alliance for Integration</b>	50			1
<b>TMRO</b>	8			
<b>Democratic Party of Turks in North Macedonia</b>	6			
<b>United Macedonia</b>	4			
<b>DNET – Movement for National Unity of Turks</b>	2			
<b>Union of Roma</b>	1			
<b>Your Party</b>	1			
<b>Rodina</b>	1			
<b>Independent Candidate</b>	1			
<b>Total</b>	<b>713</b>	<b>3</b>	<b>22</b>	<b>8</b>

Table 7: Number of Advertisements by Type of Structure (billboard, video screen, building, bridge)

VMRO-DPMNE and SDSM clearly stand out as the most active actors, with 261 and 226 advertising surfaces, respectively. Together, the two parties account for 65.3% of total political advertising.

Only three parties, VMRO-DPMNE, SDSM, and LDP, used video screens, while building façades as an advertising medium were used exclusively by the two leading parties. It should be mentioned that these forms are not prescribed/regulated by the Electoral Code. Building façades, particularly at high-traffic locations, represent premium advertising space with significantly greater visual impact and higher costs. Video screens, although limited in number, offer a dynamic and modern form of communication that enhances the perception of technological advancement and contemporaneity of the party.

These premium locations are not only costly but also limited in number, intensifying competition for access and reflecting the actual power dynamics within the political space. The fact that only a few parties have access to this type of advertising clearly illustrates the economic stratification of the campaign and points to a significant disparity in resource mobilization and access to premium advertising locations among political actors.

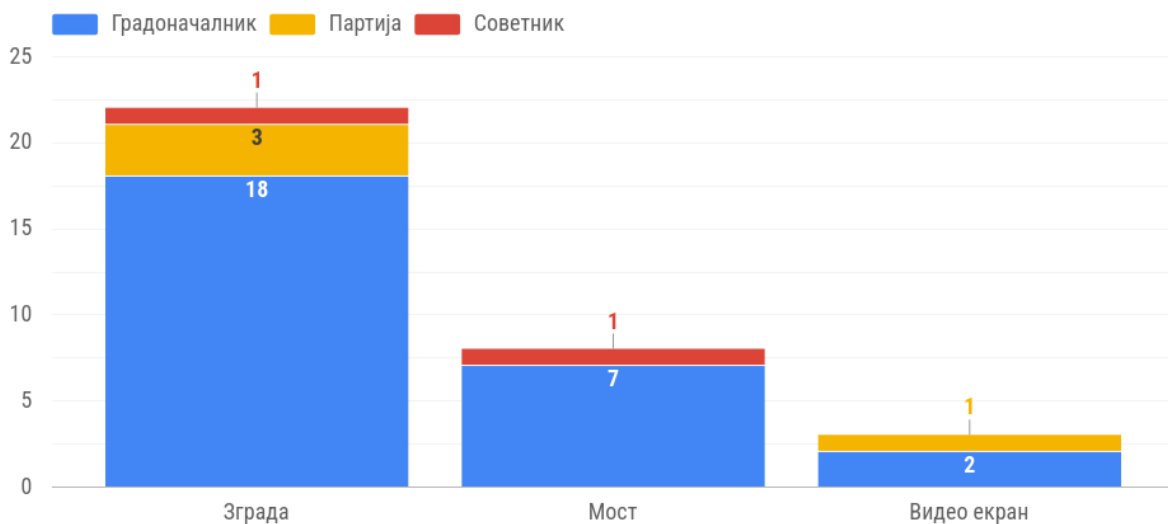


Figure 6: Distribution of structure type by type of political subject

In addition to traditional billboards, increased use of building façades, bridges, and video screens as media spaces is observed. This diversification points to a creative adaptation of the urban landscape for political purposes and an effort to overcome the “saturation” of conventional billboard locations. A clear economic stratification is evident: while leading parties compete for premium locations and innovative media formats, medium-sized and smaller parties remain confined to standard billboards in less attractive locations. This reflects broader inequalities in political financing and resource mobilization.

The mapping indicates that different forms of outdoor political advertising were not limited to central urban areas. In addition to billboards and advertising panels located along major boulevards and intersections, other forms of advertising were observed across various types of settlements, including residential neighbourhoods and smaller municipalities. In several cases, campaign messages were displayed on alternative advertising surfaces, such as digital screens installed on private properties (for example, TV screens placed on private houses), where political content was broadcast during the campaign period. This suggests that campaign messaging extended beyond traditional billboard infrastructure and appeared in a wider range of locally available advertising formats. These examples illustrate the diversity of

outdoor campaign communication practices and indicate that political messaging can adapt to locally available infrastructure, particularly in areas where standard billboard advertising is limited.

Photographic evidence also reveals a trend toward growing visual standardization. Regardless of party affiliation, advertisements tend to follow similar formats: a dominant portrait, strong party colours, minimal text, and homogeneous composition. While this reduces creative diversity, it increases visual recognizability, a trend that is becoming the norm in political advertising in North Macedonia. The data indicate that visual diversity is minimal, increasing the likelihood of voter “visual fatigue” in response to political messages.

Although different types of infrastructure offer opportunities for differentiation, most parties adhere to safe, conventional solutions. Only the largest parties take risks with innovative formats, further consolidating their dominance not only through quantity but also through the quality and diversity of their visual presence.

## **Comparison with the 2021 Local Elections**

The comparison with the 2021 Local Elections reveals a significant shift in the balance of power. In 2021, SDSM and its coalition led with 34.9% of all billboards, compared to VMRO-DPMNE with 28.0% (a difference of 6.9 percentage points). In 2025, the situation is reversed: VMRO-DPMNE leads with 34.4%, while SDSM accounts for 30.3% (a difference of 4.1 percentage points). This shift reflects broader political changes at the central government (VMRO-DPMNE being the governing party) and confirms a strong correlation between electoral performance and resource mobilization in subsequent election cycles.

Bipartisan dominance has slightly increased. In 2021, the two leading coalitions accounted for 62.8% of all billboards, while in 2025 this share rose to 64.7%. The total number of parties using billboards decreased from 17 (2021) to 14 (2025), indicating further consolidation of political power. The overall number of billboards declined by 3.6% (from 740 to 713), which may reflect reduced available infrastructure or lower investment in visual advertising.

## **Geographic Distribution and Local Strategies**

Urban concentration has increased significantly. In 2021, Skopje accounted for 54.3% of all billboards; in 2025 this share rose to 60.9%, an increase of 6.5 percentage points. This indicates a more pronounced strategy of concentrating resources in the capital, where the largest number of voters and the highest media visibility are located. In absolute terms, Skopje recorded 434 billboards in 2025, compared to 402 in 2021, representing an 8% increase.

The ranking of the top municipalities remains relatively stable: Skopje, Tetovo, and Kumanovo are among the most covered municipalities in both 2021 and 2025, indicating a consistent perception of these areas as strategically important. However, several municipalities show notable changes. Ohrid experienced a sharp decline (from 42 billboards in 2021 to 20 in 2025, a 52% decrease), while Gostivar also recorded a substantial drop (from 29 to 10 billboards, a 66% decrease). These shifts may reflect changes in local political dynamics, reduced resource allocation, or altered perceptions of electoral competitiveness in these municipalities.

## **Gender Representation in Visual Political Communication**

Gender representation shows a notable improvement. In 2021, women accounted for 14.3% of billboards, while in 2025 this figure increased to 19.3%, an improvement of 5.0 percentage points. In absolute terms, this represents an 8.5% increase (from 106 to 115 billboards).

promoting female candidates), despite the overall reduction in the total number of billboards by 3.6%.

This improvement is particularly significant given the overall decline in billboard numbers, indicating that women's visual representation has not only been maintained but has increased. However, this modest progress does not alter the fundamental gender imbalance. Women remain severely underrepresented as mayoral candidates (10.4% in 2025), and the improvement in visual representation is largely due to more intensive promotional support for nominated female candidates. This points to a positive shift in party strategies toward women candidates, while the structural issue of low nomination rates remains unchanged.

## **Content Type and Campaign Focus**

The distribution of content types indicates a significant shift in campaign strategies. Billboards promoting mayoral candidates declined from 85.7% (2021) to 76.6% (2025), a decrease of 9.1 percentage points. At the same time, general party advertising increased markedly from 9.2% (2021) to 16.8% (2025), an increase of 7.6 percentage points.

This points to a noticeable shift toward broader party identification over individual personalization. While in 2021 parties relied almost exclusively on the personal appeal of candidates, in 2025 parties, particularly VMRO-DPMNE, invested substantially more in building the overall party brand.

Council lists remain marginalized in both election cycles (5.1% in 2021; 6.6% in 2025), despite a modest improvement of 1.5 percentage points. This suggests a persistent structural issue in the promotion of local councils, with no indication of substantial progress.

## **Infrastructure Diversity**

The total number of billboards decreased by 3.6% (from 740 in 2021 to 713 in 2025), suggesting a slight reduction in the use of political advertising infrastructure or lower campaign budgets. Notably, despite the increased availability of advertising locations, particularly in central urban areas, the number of utilized billboards declined. As data on the total number of locations offered are unavailable, it is not possible to determine whether all available opportunities were used.

A shift is also evident in the prioritization of Side A versus Side B. In 2021, 58.2% of billboards were placed on Side A, compared to 56.2% in 2025, a decrease of 2.0 percentage points.

## **Key Comparative Trends (2021–2025)**

The comparison with the 2021 Local Elections reveals several notable trends. The most prominent change is the shift in party dominance: while SDSM led in the number of rented billboards in 2021, VMRO-DPMNE took the lead in 2025. Urban concentration increased significantly, with Skopje accounting for an even larger share of total billboards. A positive development is the improvement in gender representation on billboards; however, fundamental structural challenges persist. The most significant strategic change is the increased use of party advertising over individual candidate-focused messaging, indicating a move away from highly personalized campaigns toward institutional party brand-building, a trend that is particularly evident among one of the major parties. This raises the question of whether such an approach will become a broader practice among other parties in future local elections.

## Conclusions

1. Party consolidation and dominance  
The two leading coalitions (VMRO-DPMNE and SDSM) occupy 65% of the visual advertising space, with VMRO-DPMNE taking the lead compared to the previous election cycle. Smaller parties are largely marginalized, with only 14 out of 27 parties managing to secure billboard advertising.
2. Two distinct campaign philosophies  
VMRO-DPMNE builds institutional trust through party branding (with 45% party-focused advertisements), while SDSM relies on personalized campaigns (99% candidate-focused advertising). This divergence reflects a deeper split in perceived sources of political legitimacy—organizational loyalty versus personal charisma.
3. Urban hyper-concentration  
Skopje accounts for 61% of all billboards, with an even stronger concentration in three municipalities (Centar, Karpoš, and Aerodrom). This urban dominance has intensified compared to 2021, creating a substantial gap in visual exposure between urban and rural voters.
4. Gender progress with structural constraints  
Women show improved visual representation (from 14.3% in 2021 to 19.3% in 2025), yet the core issue persists at the nomination stage—women constitute only 10.4% of mayoral candidates. Paradoxically, nominated women often receive more promotional resources than men, but their marginalization begins before the visual campaign. For council candidates, despite a 45% legal quota for women, the visual campaign fails to reflect this balance.
5. Marginalization of local councils  
Council lists, despite their central role in local governance, remain sidelined in visual campaigning. This diminishes public interest and deepens perceptual gaps around the importance of local councils. It represents a missed opportunity to strengthen local democracy and points to the need for structural reforms in how parties promote council lists.
6. Premium locations = political power  
Access to building façades, video screens, and premium billboard locations is reserved almost exclusively for wealthier parties, reproducing existing political hierarchies. Visual dominance is driven less by message quality than by financial and organizational capacity, resulting in a political landscape with limited genuine visual competition.

## Field work findings

This report summarizes findings from field-based photo documentation of political promotional materials and messages in public space. The document presents a systematic recording of observed electoral irregularities identified during the campaign for the 2025 local elections in North Macedonia.

The election campaign for the first round of voting commenced on 29 September at 00:00 and concluded at 24:00 on 17 October (voting held on 19 October). The election campaign for the second round of voting lasted until 24:00 on 31 October (voting held on 2 November).

Each year, the State Election Commission conducts a draw for the allocation of locations for advertising panels and billboards, designating the companies and locations where political parties are permitted to advertise during the election campaign.

The documented cases cover the period from 10 October to 1 November 2025, with a focus on urban areas in Skopje (Čair, Butel, Gjorče Petrov, Gazi Baba) and major cities across the country (Kumanovo, Kavadarci, Tetovo, Gostivar, Kičevo, Radoviš). Each recorded case includes a photograph and accompanying metadata, such as location, responsible political party, description, date, and time when the photograph was taken.

The system of outdoor political advertising during the 2025 local elections is formally regulated through a centralized lottery mechanism conducted by the State Election Commission (SEC), based on offers submitted by licensed advertising providers; however, its practical implementation reveals significant transparency and accountability gaps. A total of 17 companies applied and were included in the allocation process, collectively managing a mapped network of 713 billboards across 594 locations, with a strong geographic concentration in Skopje. Despite this relatively structured supply-side framework, publicly available financial data remains fragmented: based on the limited reports submitted (3 for the first round and 4 for the second), the total value of billboard-related contracts exceeds 33 million MKD (approx.), although only a portion of this amount was actually paid, with substantial outstanding liabilities recorded, indicating weak financial discipline and potential risks of informal arrangements. Importantly, the data suggests that only a small proportion of campaign participants used billboard advertising, and even fewer transparently reported these expenditures, which implies that outdoor advertising constitutes a modest but non-negligible share of overall campaign financing, likely concentrated among major political actors. The absence of comprehensive reporting, lack of published price lists and offers, and weak linkage between allocated locations and financial disclosures prevent an accurate assessment of the true market size and its share in total campaign spending. As a result, while the legal framework prescribes equitable access and price stability, the current system operates with limited traceability, partial financial visibility, and insufficient institutional oversight, undermining both market transparency and electoral integrity.

Multiple types of potential violations were identified and recorded. These cases require additional verification by the competent authorities.

The observed irregularities relate primarily to:

- unauthorized placement of election propaganda materials,
- violations of rules governing visual election promotion, and
- improper use of public space for political purposes.

The monitoring was conducted using the following methodological framework, which is in detail described in D5 report.

- Field-based photography with systematic recording of location (GPS coordinates), date and time, content characteristics, gender representation (male/female), political subject (office-holder/candidate/coalition), and type of media, uploaded in the BMAP data collection tool.
- Classification of each record by location type and political subject.
- Aggregation of findings by city/municipality, with identification of cases of indicative value (good practices and risk cases).

## KEY FINDINGS – Grey areas in outdoor advertising

- Illegally placed billboards, banners, and posters: A large volume of campaign materials was installed on private properties, traffic lights, billboard poles, bus stops, and pedestrian bridges without appropriate permits.
- Residential areas: The use of private houses and residential buildings for placing political promotional materials was documented.
- Video beams / LED screens: Screens displaying rotating messages of multiple political subjects at a single location were recorded (e.g. at *Mavrovka* and at privately owned houses rented and used as party headquarters).
- Vandalism of competitors' materials: In Kavadarci, the placement of posters over billboards of other political subjects was documented.
- Other billboard locations: In Radovish, billboards were identified that fall outside municipal jurisdiction and are not managed by any of the 17 marketing agencies selected through the official draw procedure.
- Pedestrian bridges: These structures are frequently used for placing posters and banners, particularly along routes leading to high-traffic residential areas.

## Geographic Distribution of irregularities

- Skopje – Čair, Bitpazar (Krstev Misirkov Boulevard), Centar (Mother Teresa Boulevard), Karpoš, and Gjorče Petrov (Volkovo): 11 documented locations
- Kavadarci – widespread presence of illegal posters
- Kumanovo – active billboards displayed outside the legally permitted campaign period
- Tetovo and Gostivar – banners placed at busy intersections without authorized billboard infrastructure

Identified Political Subjects - The political subjects most frequently documented in relation to irregularities include:

- VLEN Coalition (Izet Mexhiti, Zekerija Berisha)
- NAI (Bujar Osmani, Ali Ahmeti, Skender Jusufi)
- VMRO-DPMNE (Orce Gjorgjievski, Mitko Jancev)
- Independents Together (Goran Markovski)
- SDSM (Goran Gerasimovski)

## Key findings

Several examples are presented to illustrate different types of outdoor advertising that political parties and candidates used during elections, some of which are not regulated, some found in non-compliance with the existing framework or showed opaque practices

### Use of Infrastructure

- Posters and banners placed on traffic lights and bus stations
- Banners, flags, and screens installed above major roads and roundabouts, documented in multiple cities.
- Use of pedestrian bridges for placing oversized banners.
- Unregulated area of using private houses/residential buildings for political advertising

### Temporal Inconsistencies

- A billboard featuring Stevo Pendarovski (from the presidential elections) remained active in October 2025 in Kumanovo.
- LED screens displaying rotating advertisements for multiple candidates at the same location (e.g., Mavrovka, Bitpazar).

### Urban Aesthetics and Public Space

- Mass posting of posters on poles, fences, and building façades.
- Vandalization of bus stops through excessive placement of campaign materials.
- Visual pollution of urban areas.
- Visibility and Reach: Bridges, intersections, and LED screens generate high reach; bus stops ensure repeated exposure.
- Resource Intensity: LED screens / billboards >> banners >> stickers.
- Non-compliance Risks: Unauthorized stickers and banners; posters on public equipment; overlaps and interference with other parties' leased spaces.
- Permit Traceability: Systematic archiving of contracts and permits is required for each location (operator, period, surface area, lighting).
- Ethical Considerations: Respect for public order, traffic safety, and minimization of visual clutter.

The documented cases point to a systemic problem in the enforcement of election legislation and insufficient oversight by competent institutions. The election campaign unfolded with significant deviations from prescribed rules, creating unequal conditions for political actors and undermining the principles of fair and democratic elections.

TABULAR OVERVIEW

City / Municipality	Date	Location	Type of Material / Location	Candidate / Coalition	Specific Irregularity
Skopje – Čair	15.10.2025	Krste Misirkov Blvd., Bit Pazar, pedestrian bridge toward Centar	Banner on pedestrian bridge	Izet Mexhiti (VLEN)	Banner placed on a pedestrian bridge above a traffic artery
Skopje – Butel	12.10.2025	Mother Teresa Blvd., bus stop toward Čair	Posters on bus stop	Zekerija Berisha (VLEN)	Mass posting of posters on a bus stop
Skopje – Čair	12.10.2025	Cvetan Dimov St., toward Butel	Bus stop + pedestrian bridge	Izet Mexhiti (VLEN), Bujar Osmani (NAI)	Combined placement of materials on a bus stop and pedestrian bridge
Skopje – Karpoš	10.10.2025	Varšavska St.	Stickers – party promotional materials	General party content – Levica	Stickers placed on poles in front of a retail store
Skopje – Čair	11.10.2025	Mavrovka, Bit Pazar	LED screen – video content	Goran Gerasimovski (SDSM), Orce Gjorgjievski (VMRO-DPMNE), Izet Mexhiti (VLEN), Ali Ahmeti (NAI)	Rotating political advertisements of four candidates on a single LED screen
Skopje – Čair	11.10.2025	Municipality of Čair, near Mavrovka, bridge above Plasticharska	Banner on pedestrian bridge	Bujar Osmani (NAI), Izet Mexhiti (VLEN)	Banner placed above a major boulevard
Skopje – Butel / Čair	12.10.2025	Bosnia and Herzegovina Street	Traffic light	VLEN	Stickers placed on traffic lights
Skopje – Čair / Gazi Baba	12.10.2025	Various locations	Posters on billboard poles	Izet Mexhiti (VLEN), Skender Jusufi (NAI), Srđan Amet (Union of Roma)	Posters placed on billboard support poles
Skopje – Čair	12.10.2025	Cvetan Dimov Street	Banners	NAI	Banners suspended above a street
Skopje – Čair	12.10.2025	Pedestrian bridge, Bit Pazar toward Čair	Posters on wall	Izet Mexhiti (VLEN)	Mass posting of posters beneath a pedestrian bridge
Skopje – Čair	12.10.2025	Various locations across municipality	Banners above streets	NAI and VLEN	Multiple banners installed at busy intersections
Skopje – Gjorče Petrov	12.10.2025	Private house	Billboard on private house	Goran Markovski (Independents Together)	Billboard installed on a private residential façade
Skopje – Gjorče Petrov	01.11.2025	Near the church	Hanging billboard	Orce Gjorgjievski (VMRO-DPMNE)	Hanging billboard at a roundabout

City / Municipality	Date	Location	Type of Material / Location	Candidate / Coalition	Specific Irregularity
<b>Kumanovo</b>	12.10.2025	Central location	LED billboard	Stevo Pendarovski (presidential candidate)	Billboard still active in October 2025 from the 2024 presidential elections
<b>Kumanovo</b>	12.10.2025	Various locations	Banners	Mesut Rajami (mayoral candidate)	Banners suspended above intersections
<b>Kavadarci</b>	11.10.2025	Across the city	Mass posters + billboards	Mitko Jancev (mayoral candidate)	Posters placed throughout the city, including over competitors' billboards (vandalism)
<b>Tetovo</b>	12.10.2025	Main boulevard	Banners + posters on poles	VLEN, NAI	Identical format of hanging banners used by both parties
<b>Gostivar</b>	12.10.2025	Main traffic artery	Hanging banners	NAI (Valbon Limani and others)	Banners suspended above a main road
<b>Kičevo</b>	11.10.2025	City center	Hanging banners	NAI, VLEN, SDSM, LDP, etc.	Series of hanging banners from multiple parties
<b>Radoviš</b>	10.10.2025	City entrance	Billboard	Ljupče Pochivalec (mayoral candidate)	Billboard at city entrance – possibly outside municipal jurisdiction
<b>Radoviš</b>	10.10.2025	Within the city	Billboard	Ljupče Pochivalec (mayoral candidate)	Municipality stated that no billboards are officially registered in the city

The documented cases point to a systemic problem in the enforcement of election legislation and insufficient oversight by competent institutions. The election campaign unfolded with significant deviations from prescribed rules, creating unequal conditions for political actors and undermining the principles of fair and democratic elections. These deviations are not isolated incidents, but rather indicative of structural weaknesses in the regulatory and institutional framework governing campaign finance and political advertising. In particular, gaps in transparency, inconsistent reporting practices, limited publication of key data (such as pricing, locations, and contractual arrangements), and weak inter-institutional coordination have collectively reduced the ability of oversight bodies to effectively monitor compliance and enforce the law. Moreover, the absence of clear accountability mechanisms, especially for institutions responsible for publishing and verifying data, creates an asymmetry whereby obligations are imposed on campaign participants, but not equally enforced on public authorities. This environment increases the risk of selective compliance, accumulation of unpaid liabilities, and potential misuse of public and private resources, thereby eroding public trust in the electoral process.

From a systemic perspective, the current framework prioritizes procedural compliance over substantive transparency. While the Electoral Code establishes formal rules for allocation and reporting, it does not ensure that these processes are fully traceable, comparable, and verifiable in practice. As a result, critical linkages, such as those between allocated advertising locations, service providers, contractual prices, and actual payments, remain opaque. This weakens the integrity of campaign finance oversight and limits the capacity of institutions, civil society, and the public to conduct meaningful scrutiny.

### **General Conclusions:**

- There is a persistent gap between legal provisions and their practical implementation, particularly in the areas of reporting, publication, and verification of campaign finance and advertising data.
- Transparency is fragmented and inconsistent, with key datasets either missing, incomplete, or not published in a timely and accessible manner.
- Institutional coordination is weak, resulting in poor data exchange and lack of cross-verification between the SEC, SAO, and SCPC.
- Financial accountability is insufficient, as evidenced by unpaid obligations and limited traceability of payments for advertising services.
- The regulatory framework does not adequately address market dynamics and fairness in access, allowing potential imbalances in visibility among political actors.
- The overall system lacks deterrence mechanisms, both for non-compliant campaign participants and for institutions failing to fulfill transparency obligations.

### **Recommendations for Improving the Framework and Practices:**

#### **1. Strengthen Legal Transparency Obligations**

Amend the Electoral Code to introduce explicit requirements for the publication of:

- complete offers from advertising providers (locations, prices, formats),
- detailed allocation results (by participant, location, and provider),
- standardized financial reports with itemized advertising expenditures.

#### **2. Introduce Mandatory Data Standardization and Digital Reporting**

Develop a unified digital reporting system across SEC, SAO, and SCPC that ensures:

- real-time or near real-time submission of data,

- standardized formats enabling comparability,
- public access through a centralized, searchable platform.

**3. Ensure Full Traceability of Advertising Expenditures**

Require political entities to report advertising expenses with full granularity, including:

- provider name,
- number and location of billboards,
- unit price and total contract value,
- payment status (paid, unpaid, delayed).

**4. Introduce Deadlines and Sanctions for Institutional Non-Compliance**

Establish clear legal deadlines for the publication of all reports by SEC, SAO, and SCPC, and introduce:

- administrative sanctions for responsible officials in case of non-publication,
- mandatory audit trails for all submitted and published data.

**5. Strengthen Financial Accountability Mechanisms**

Require:

- all campaign-related liabilities are settled within a legally defined period after elections,
- unpaid obligations are publicly disclosed and subject to enforcement measures,
- payments are made exclusively through dedicated campaign accounts to ensure auditability.

**6. Enhance Inter-Institutional Coordination and Data Sharing**

Formalize mandatory data exchange protocols between SEC, SAO, and SCPC, including:

- automatic sharing of lottery allocation data,
- cross-checking of financial reports against allocation records,
- joint audit procedures where inconsistencies are identified.

**7. Introduce Eligibility and Capacity Criteria for Advertising Providers**

Establish minimum requirements for companies participating in election advertising

markets, including:

- proof of operational capacity,
- financial and legal compliance history,
- transparency of ownership structures.

#### **8. Improve Oversight and Public Accountability**

Encourage proactive oversight by:

- enabling civil society and media access to machine-readable datasets,
- publishing regular monitoring summaries during the campaign,
- introducing independent audit or verification mechanisms for high-risk areas.

#### **9. Reassess the Role and Share of Outdoor Advertising in Campaign Financing**

Conduct a comprehensive review of:

- the proportion of outdoor advertising in total campaign spending,
- potential caps or guidelines to ensure equitable visibility,
- alignment with international standards (e.g., OSCE/ODIHR recommendations).

Overall, addressing these challenges requires a shift from a formalistic compliance model to a transparency- and accountability-driven system, where data is complete, verifiable, and accessible, and where both political actors and institutions are equally subject to enforceable obligations.

## **Annex 1 - Evidence based monitoring - Field findings**



**Location:** Krste Misirkov Boulevard, Bit Pazar, Čair – pedestrian bridge toward Centar

**Date and time:** 15 October 2025, 18:07:13

**Content:** Izet Mexhiti, VLEN Coalition



**Location:** Private house in Gjorče Petrov

**Date:** 12 October 2025

**Content:** Goran Markovski, Independents Together



**Location:** Mother Teresa Boulevard, Butel – bus stop toward Čair

**Date and time:** 12 October 2025, 13:24

**Content:** Zekerija Berisha, VLEN Coalition



**Location:** Cvetan Dimov Street, Čair – toward Butel

**Date and time:** 12 October 2025, 13:00

**Content:**

- Izet Mexhiti, VLEN Coalition (bus stop, pedestrian bridge)
- Bujar Osmani, NAI (pedestrian bridge)



**Location:** Mavrovka, Bit Pazar, Čair – LED screen

**Date and time:** 11 October 2025, 14:14

**Content:**

- Goran Gerasimovski (SDSM)
- Orce Gjorgjievski (VMRO-DPMNE)
- Izet Mexhiti (VLEN Coalition)
- Ali Ahmeti (NAI)



**Location:** Municipality of Čair, near Mavrovka and the bridge above Plasticharska

**Date and time:** 11 October 2025, 14:09

**Content:**

- Bujar Osmani (NAI)
- Izet Mexhiti (VLEN Coalition)



**Location:** Gjorče Petrov, near the church  
**Date:** 1 November 2025  
**Content:** Orce Gjorgjievski, VMRO-DPMNE



**Location:** Bosnia and Herzegovina Street, Butel/Čair – stickers on traffic light  
**Date and time:** 12 October 2025, 13:57  
**Content:** VLEN Coalition



**Location:** Čair / Gazi Baba – posters on billboard support poles

**Date:** 12 October 2025

**Content:**

- Izet Mexhiti (VLEN Coalition)
- Skender Jusufi (NAI)
- Srđan Amet (Union of Roma)



**Location:** Cvetan Dimov Street, Čair  
**Date and time:** 12 October 2025, 13:04  
**Content:** NAI



**Location:** Čair – pedestrian bridge at Bit Pazar toward Čair  
**Date and time:** 12 October 2025, 11:08  
**Content:** Izet Mexhiti (VLEN Coalition)



**Location:** Čair

**Date:** 12 October 2025

**Content:** Candidates from **NAI** and the **VLEN Coalition**



**Location:** Kumanovo

**Date:** 12 October 2025

**Description:** An illuminated billboard in perfect condition was observed (recorded in the platform). The billboard content promoted **Stevo Pendarovski**, a **presidential candidate from the 2024 elections**, and remained active outside the relevant campaign period.



**Location:** Kavadarci

**Date:** 11 October 2025

**Description:** Kavadarci recorded the **highest concentration of posters** (multiple photographs documented) promoting **Mitko Jancev**, a **mayoral candidate**. Posters were placed extensively throughout the city, including **over billboards displaying other parties and candidates**, indicating **vandalism and obstruction of competitors' campaign materials**.



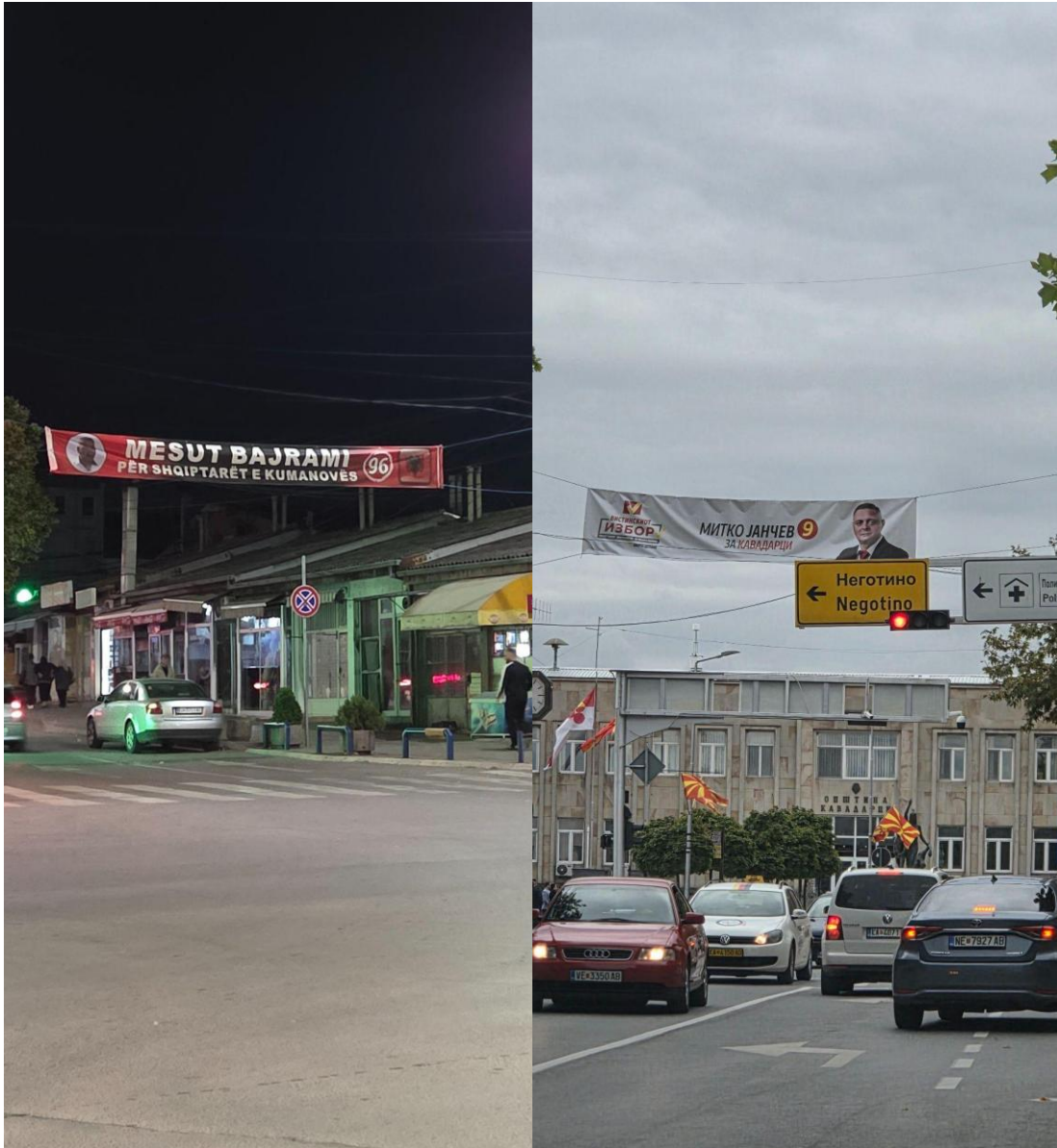
**Location:** Tetovo

**Date:** 12 October 2025

**Description:** In several locations within the city, **only hanging banners** were observed, installed at **busy intersections without authorized billboard structures**, indicating use of non-designated advertising spaces.



**Figure 1 | Figure 2**  
**Date:** 12 October 2025  
**Location:** *Figure 1 – Tetovo / Figure 2 – Gostivar*



**Figure 3 | Figure 4**

**Date:** 12 October 2025

**Location:** *Figure 3 – Kumanovo / Figure 4 – Kavadarci*

In almost all larger cities, **banners suspended above streets and roundabouts** were observed.

With the exception of certain candidates and cities—most notably **Kavadarci** and **Tetovo**—**posters were largely absent in other cities**, despite their widespread presence in previous election cycles. This indicates a shift in campaign practices toward hanging banners and other formats, and a notable reduction in poster-based campaigning in most urban areas.



**Location:** Radoviš

**Date:** 10 October 2025

**Description:** In Radoviš, one billboard was observed at the city entrance, which may fall outside municipal management, and one self-installed (unauthorized) billboard within the city. The municipality stated that no billboards are officially registered or managed within the city, indicating the presence of non-authorized advertising structures.



Photo – Stickers on Public Infrastructure (Protective Bollard)

**Observed practice:** Election campaign stickers placed on a protective street bollard located on a pedestrian passage.

**Finding:**

This image documents the placement of campaign materials on public urban infrastructure not designated for political advertising. Such placement constitutes misuse of public space and circumvents the regulated system for political advertising locations.

**Electoral integrity relevance:**

The use of informal and unauthorized micro-locations (street furniture, bollards, poles) enables political actors to increase visibility at minimal cost, creating unequal conditions among contestants and undermining the regulatory framework governing campaign advertising. This type of advertisement is not found in the invoices as separate printed budgeted costs.

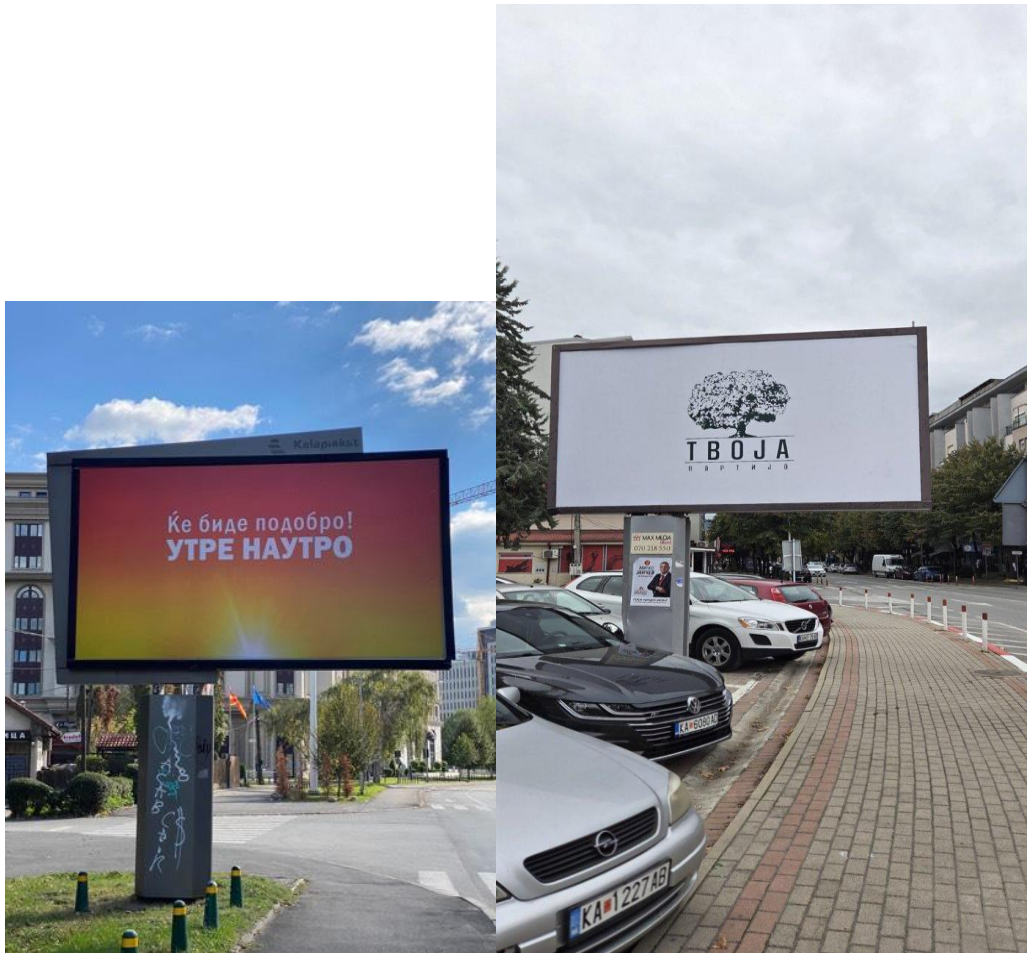


Photo – Non-Candidate Branding and Non-Personalized Content

**Observed practice:** Large screen displaying a political slogan without explicit identification of a candidate at the moment of documentation. Standard billboard promoting a political party brand without reference to a specific candidate.

**Finding:**

The use of digital screens represents a high-value campaign medium with strong visual impact and continuous exposure. The absence of clear candidate attribution raises questions regarding classification (party branding vs. candidate promotion) and reporting in campaign finance declarations. This reflects a campaign strategy focused on party branding rather than individual candidacies. While formally permitted, such content still occupies regulated advertising space and should be reflected in allocation records and financial reports.

**Electoral integrity relevance:** Digital outdoor advertising increases opacity in monitoring expenditure, duration, and compliance with campaign silence periods, particularly when content rotates or lacks clear attribution. Party-focused billboards may indirectly advantage larger parties with stronger financial capacity, reinforcing asymmetries in visibility even when formal rules are respected.



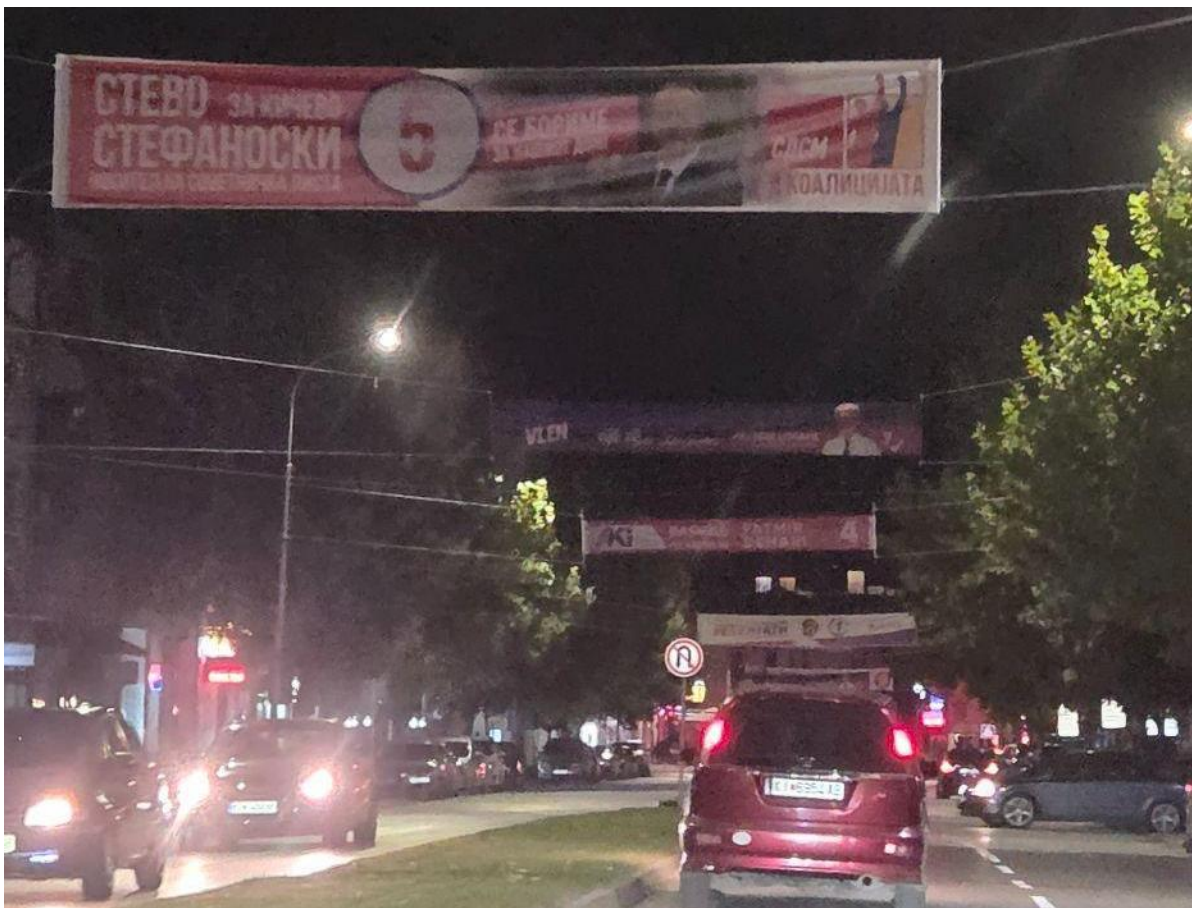
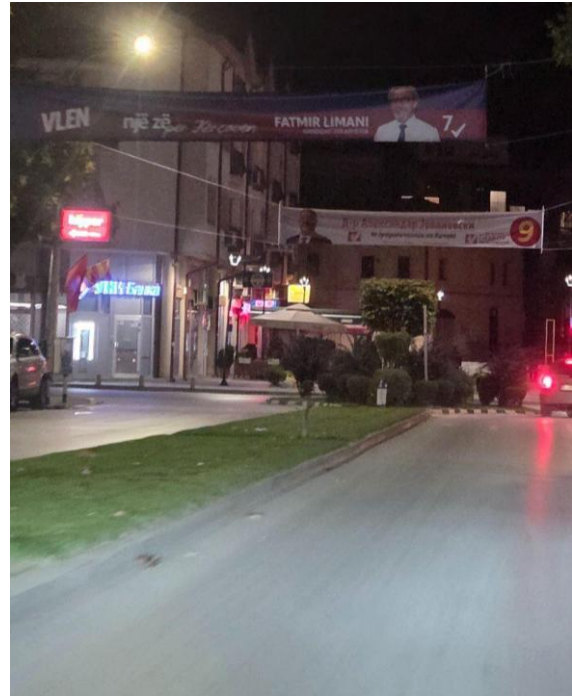
#### Billboard under Overpass / Bridge Structure

Observed practice: Campaign poster placed on a column under a road overpass, integrated into transport infrastructure. We cannot check if this is a regular location in the packages offered by the marketing agencies, due to not publicly available information from the SEC.

#### Finding:

The placement leverages high-traffic infrastructure not primarily intended for political advertising. This raises concerns about authorization, safety considerations, and compliance with municipal regulations governing use of transport-related structures.

Electoral integrity relevance: Such locations provide exceptional exposure but are often weakly regulated or ambiguously classified, creating enforcement gaps and potential preferential access for certain actors.



**Location:** Kičevo

**Date:** 11 October 2025

**Description:** In Kičevo, **no billboards** were observed for the candidate who won the elections. Only a limited number of hanging banners were present, indicating minimal use of billboard infrastructure in the city during the campaign period.

## Video<sup>2</sup> streaming - finding

- Megaboard (Video 1) – *Mavrovka building*: LED megaboard displaying rotating video content for multiple candidates and political parties on the same screen during election campaign.
- LED Screen (Video 2) – *Volkovo, Municipality of Gyorče Petrov*: LED screen displaying streaming video political advertising on election day, raising concerns regarding compliance with campaign silence provisions.

## Annex 2: Kichevo as a Case study

This concludes that Billboard advertising was not a decisive campaign tool in Kičevo, despite its dominance in other municipalities.

The limited use of billboard advertising in Kičevo, despite the electoral success of the winning candidate, suggests reliance on alternative campaign strategies beyond large-scale visual promotion. Such strategies may include intensified ground campaigning, party organizational networks, direct voter outreach, or non-billboard communication channels.

Kičevo represents an outlier case in the 2025 local elections, where minimal use of billboard infrastructure coexisted with electoral success, underscoring the need for nuanced, municipality-specific analysis of campaign practices.

From a monitoring perspective, while alternative campaigning is legitimate and lawful in principle, reduced visibility in regulated advertising spaces can also increase opacity in campaign activities or can turn on the alarm for anti-corruption risks. When campaigns rely less on formally regulated and traceable advertising infrastructure and more on informal or less visible forms of outreach, this may elevate risks related to transparency and oversight, particularly in relation to:

- Unreported or underreported campaign expenditures,
- In-kind support or third-party involvement not captured in official financial reports, and
- Use of informal networks that fall outside the scope of standard electoral monitoring tools.
- Unreported donations or fundings

Importantly, the observed pattern in Kičevo does not in itself constitute evidence of irregularities or corruption. Rather, it highlights a monitoring risk area where the lack of reliance on regulated advertising mechanisms reduces the ability of oversight bodies to fully track campaign financing and resource deployment.

The Kičevo case underlines the need for:

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<sup>2</sup> Videos are attached separately due to large size of the files.

- Enhanced scrutiny of non-visual and non-regulated campaign activities, and
- Stronger financial transparency mechanisms to ensure that alternative campaign strategies remain fully compliant with electoral and anti-corruption standards.

Kičevo represents a low-visibility, high-impact campaign model that warrants closer analytical attention—not because of proven wrongdoing, but due to increased transparency risks inherent in less regulated campaign practices.