

MEDIA SUSTAINABILITY INDEX

2006/2007

**The Development
of Sustainable
Independent Media
in Europe and Eurasia**



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The Development of Sustainable Independent Media in Europe and Eurasia

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SERBIA

outside the capital, Belgrade, and the withdrawal of the state from local media, national dailies, electronic media, and the news agency Tanjug as important tasks ahead.

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Parliamentary elections in early 2007 capped a year of dramatic political events that played out across the media. In March 2006, former President Slobodan Milošević was found dead in his prison cell at a UN detention center while on trial for war crimes. Then in May, the European Union called off talks on closer ties with Serbia because of its failure to arrest war-crimes suspect Ratko Mladić. Montenegro voted for independence, and the state of Serbia and Montenegro ceased to exist; and the last stages of the dissolution of the former Yugoslavia played out in the continuing international negotiations on the final status of Kosovo. Meanwhile, in October, Serbia voted for the country's first Constitution in the post-Milošević era, followed by parliamentary elections in January 2007.

The political conflicts behind these events caused renewed pressures on the media's independence and professionalism. The Media Sustainability Index (MSI) panel viewed the strong influence of the ruling coalitions on the media as key to the sector's stagnation during the year, with the MSI score effectively unchanged from the previous year at 2.47. The MSI assessment contrasted this situation with the relatively quick improvement of the media sector just after the toppling of Milošević in 2000 and traced it to the political changes in Serbia after the assassination of the first democratic prime minister, Zoran Djindjić, in 2003.

The pressures on the media took varying forms during the year, from the failure to implement legal protections to direct, sometimes brutal, interference in editorial practices through the judicial system, corruption, and political influence, according to MSI panelists. They were particularly critical of frequency allocation and said the regulatory Republic Broadcasting Authority was not meeting its mandate, while also citing the improvement of media outside the capital, Belgrade, and the withdrawal of the state from local media, national dailies, electronic media, and the news agency Tanjug as important tasks ahead. However, panelists noted that progress in some other aspects of the media sector, including development of the advertising market, prevented the overall MSI score from dropping significantly.

The MSI assessment of legal protections for free speech showed a drop from 2005, when new media laws were implemented. The panel said the high expectations were not met, especially in the areas of political influence on broadcast media licensing and lack of prosecution in cases of crimes against journalists. Professionalism showed a modest rise, due to what panelists saw as good coverage of key events and the multiple news programs on broadcasters with national coverage as well as a number of local media covering local events. The third objective, the plurality of news sources, deteriorated somewhat, mainly due to virtually no transparency in the ownership of a number of outlets, including some with national coverage. The fourth objective, connecting business results with media independence, show good improvement due to the increasing role of the market in media income, with advertising agency activities improving for the fifth year in the row. The fifth objective assessing media-supporting institutions was unchanged again.

SERBIA AT A GLANCE

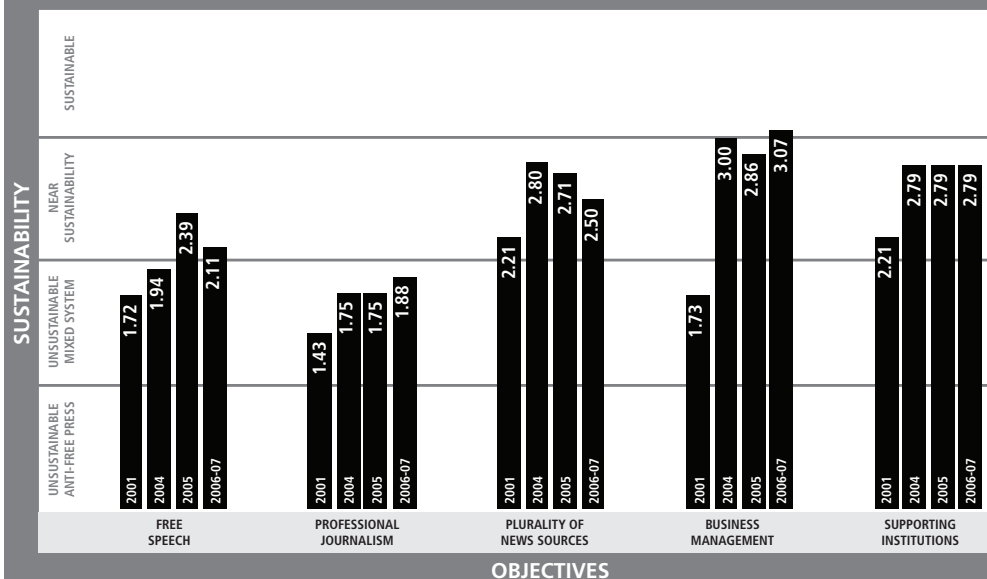
GENERAL

- > **Population:** 7,432,000 (SMMRI)
- > **Capital city:** Belgrade
- > **Ethnic groups (% of population):** Serb 82.86%, Hungarian 3.91%, Bosniak 1.82%, Roma 1.44%, Yugoslav 1.08% other 8.89% (Federal Statistical Office)
- > **Religions (% of population):** Serbian Orthodox 85%, Catholic 5.5%, Protestant 1.1%, Muslim 3.2%, unspecified 2.6%, other, unknown, or atheist 2.6% (2002 census)
- > **Languages (% of population):** Serbian 88.3%, Hungarian 3.8%, Bosniak 1.8%, Romany 1.1%, other 4.1%, unknown 0.9% (2002 census)
- > **GNI (2006-Atlas):** \$29.011 billion, not including Kosovo (World Bank Development Indicators, 2007)
- > **GNI per capita (2006-Atlas; PPP not available):** \$3,910, not including Kosovo (World Bank Development Indicators, 2007)
- > **Literacy rate:** 96.4% (2003 est., *CIA World Factbook*)
- > **President or top authority:** President Boris Tadic

MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, television stations:** approximately 1,100 total
- > **Newspaper circulation statistics:** No statistics are available, but Blic, Vecernje novosti, Kurir are considered to have the largest circulation (IREX/SMMRI research data)
- > **Broadcast ratings:** TV stations: TV RTS 1, TV PINK, TV B92; Radio stations: Radio Beograd 1, Radio B-92, Radio S (IREX/SMMRI research data)
- > **News agencies:** BETA (private), FONET (private), TANJUG (state)
- > **Annual advertising revenue in media sector:** \$115 million (estimated real value for 2006 by AGB Nielsen)
- > **Internet usage:** 1.4 million (CIA World Factbook, 2006 est.)

MEDIA SUSTAINABILITY INDEX: SERBIA



Unsustainable, Anti-Free Press (0-1):

Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2):

Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3):

Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4):

Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

OBJECTIVE 1: FREE SPEECH

Serbia Objective Score: 2.11/4.00

The expectations that followed the 2005 implementation of new media laws have not been met, in the view of MSI panelists. Among the hoped-for improvements included fair treatment for the media and fairness in the media. What actually happened, panelists agreed, was that although most norms defined by laws were suitable and free speech was guaranteed by the regulations, the laws were not put into practice effectively. They cited as an example the Republic Broadcasting Agency activities in the controversial area of issuing of licenses. They also noted the misuse of free expression protections in the form of hate speech, especially against minority groups, which they said was not uncommon in some media and in a number of politicians' speeches. The sanctioning of such practices is ineffective due to the lack of reactions from prosecutors and injustice in the implementation of the rule of law, panelists said. As a result, Serbia's score for this objective dropped significantly from 2.39 in 2005 to 2.11.

The licensing of broadcast media finally started in 2006 after long delays, but panelists were highly critical of most activities of the Republic Broadcasting Agency. They said licenses for national frequencies were determined under various pressures, with the result being that licenses went to nonexistent television stations but not to some well-established television and radio broadcasters. According to panel members, one license winner, FOCUS radio, was

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

The panelists said that the prosecutors were not interfering in cases of hate speech and said the situation was especially bad in small localities where municipality authorities, prosecutors, jurisdiction, and police have very close ties. "I don't remember when a single attack on journalist was adequately sanctioned," said panelist Slobodan Kremenjak, a Belgrade lawyer.

prone to use of hate speech. The second tender for regional frequencies left out bidding on some important towns in Serbia, panelists said. Also, the prices for frequencies determined by the agency were considered unjustifiably high.

The market entry and tax policy is not discriminatory toward the media in Serbia, although panelists said they thought that there should be positive discrimination for print and broadcast media in minority languages.

There were a number of serious crimes against journalists, including attacks, serious threats, and break-ins at editorial offices, but panelists said the state was systematically ignoring crimes against journalists or media outlets. The panel cited the cases of journalists Slavko Ćuruvija, killed in 1999, and Milan Pantić, killed in 2001, as not having been resolved to the media community's satisfaction, although the police continued investigations in 2006. The panelists also said that the prosecutors were not interfering in cases of hate speech and said the situation was especially bad in small localities where municipality authorities, prosecutors, jurisdiction, and police have very close ties. "I don't remember when a single attack on journalist was adequately sanctioned," said panelist Slobodan Kremenjak, a Belgrade lawyer.

Overall, the MSI assessment concluded, there is strong interference by state structures into media, and media privatization has not proceeded. "If there were improvements in this year that was more the result of circumstances than the result of politicians' wishes to diminish influence on media," said panelist Voja Žanetić, marketing specialist for the MOSAIK Marketing Agency in Belgrade.

Politicians choose managers and editors-in-chief at the more than 100 state-owned media in Serbia, and the state news agency Tanjug is financed from the state budget and is competing with private independent agencies. The strongest pressure is on regional state media by local politicians and

Panelists noted, in particular, municipalities where the Radical party is in power, such as in Novi Sad, where practically the party is the “editor” of the local state-owned electronic media, and in Novi Pazar, where some media are under direct local party control.

businessmen. “Self-censorship encouraged by economic pressures happened more often than one induced by political pressures,” suggested panelist Dragoljub Žarković, director and editor-in-chief of the *Vreme* weekly in Belgrade.

Panelists noted, in particular, municipalities where the Radical party is in power, such as in Novi Sad, where practically the party is the “editor” of the local state-owned electronic media, and in Novi Pazar, where some media are under direct local party control. The panelists also said there are some positive examples where local municipalities are not pressing state-owned media and are helping them to privatize as soon as possible.

Libel remains under the Criminal Code. However, the newly introduced criminal law abolished imprisonment and introduced financial penalties. Panel members expressed concern that this new solution will be worse for journalists. They said no journalists were sent to prison for libel on the basis of the old law because judges did not want to get the reputation of exerting pressure on media. However, Željko Bodrožić, editor-in-chief of the newspaper *Kikindske* from Kikinda was sentenced by a local court to huge fines after being accused by local politicians and nationalists whose activities he was describing in his newspaper. The UN Committee for Human Rights ruled against the verdict in late 2005, but the Ministry of Justice refused to act.

Serbia has adopted a Law on Free Access to Information of Public Importance. However, implementation remains problematic. The Independent Association of Journalists asked the public prosecutor for information on the cases of Željko Bodrožić and the unexplained 1994 death of Dada Vujašinić, a journalist who was writing on war crimes, but the answer was that the association is not an institution to whom it will respond. However, panelists noted that the independent Commissioner for Information of Public Importance is doing his best to improve practices, although the obstruction from state institutions is very strong.

There is unrestricted access to international news sources, and there are no restrictions on entering journalism as a profession.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Serbia Objective Score: 1.88/4.00

Traditionally, professionalism of journalists has received the lowest overall rating for any objective in the MSI for Serbia. For 2004 and 2005, the ranking was the same at 1.75. This year, marginal improvement was observed, with a rise to 1.88. Lingering problems remain: no quality specialist journalism, very low salaries, aggressive “tabloid” journalism, and lack of coverage for some important themes. A large percentage of the journalists working in the more than 1,000 Serbian media outlets are not educated in spite of a number of active journalistic faculties, schools, and professional-development options. Lack of professionalism in media also produces vulnerability to political or other pressures, panelists said. Journalistic ethics in a number of cases are ignored due to ideological prejudices, neglecting of responsibility, corruption, or general lack of professional competence, they said. Economic conditions at media outlets and among journalists themselves also negatively impact professionalism in the media.

MSI panelists unanimously agreed that reporting generally is not fair, objective, or sourced on relevant information. “Serbian editorial offices are full of journalists of doubtful moral credibility, so objective reporting we could recognize only when mentioning a small number of real professionals,” said Goran Vladković, editor-in-chief of OK Radio in Vranje.

Panelists said that in a number of media outlets there are repeated cases of unethical behavior and systematic ignoring of ethical standards. The print tabloids and some magazines

JOURNALISM MEETS PROFESSIONAL STANDARDS OF QUALITY.

PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

are most problematic, they said, but there are cases of similar behavior among broadcast media. Panelists placed responsibility on editors and said there have been lapses among media otherwise known for keeping ethical standards. They cited cases in which questionable practices are allowed, such as publishing the names of children in trouble, misusing children for political promotion, and others.

There are cases of self-censorship, panelists said, but it is not a dominant practice. Sometimes it could be positive. Most self-censorship in Serbia is motivated by economic interests, and rather less by political interests. It is not a product of direct pressure. "The journalists are not forced to practice self-censorship; it is more a question of a specific media environment and a long tradition of self-censorship," said Žarković, director and editor-in-chief of the *Vreme* weekly in Belgrade.

Panelists were supportive of the progress in terms of the scope of coverage. They said that all key events are covered regularly and fully. Only media in minority languages or for minority populations, such as Albanian, Hungarian, or Roma, have problems with this because of very low financial resources at their disposal.

The salaries of journalists in most media in Serbia are extremely low and do not discourage corruption. "Hidden advertising" in paid-for articles is considered by many advertisers as a more efficient method of marketing, and journalists too often see this as an opportunity to secure extra earnings to better support their families. Panelists noted with concern that pay is low on average at all media outlets, including those that are financially viable. "The amount of money entering into media is rising, and we are faced with an increasing number of invisible ordered texts by different subjects," said Žarković. "This is paid apart from normal salary. Editors are not always able to recognize them."

The proportion of information programming in the total schedule of most electronic media is satisfactory. Several new and "old" television houses extended information programming, the competition among them is strong, and panelists unanimously thought that they are of good quality.

Technical equipment continues to age, and few media outlets succeed in renewing it. Media companies have problems in acquiring new equipment because of non-eligibility for banking guarantees.

Quality niche reporting is not widespread, but there are good examples. The leader mentioned by panel members was TV and Radio B92, with several good investigative and specialized journalism pieces. The television program "Insider" contributed significantly to the improvement of investigative journalism, panelists said. However, overall

"State-owned media are tragic regionally," said Vladković. "In local municipalities, they are loudspeakers of local authorities. They are not informing; they are advertising authorities that are paying them."

the quality of investigative journalism is one of the Serbian media's problems, with few journalistic specialists. The panel cited the inadequate coverage of dire air pollution in the town of Pančevo and of financial and banking themes in its generally low assessment.

OBJECTIVE 3: PLURALITY OF NEWS SOURCES

Serbia Objective Score: 2.50/4.00

The plurality of news sources available in Serbia was diminished by a number of factors, including a decline in scientific and educational programming, discrimination by news agencies, nontransparent ownership in most media, the very low economic potential of local broadcasting media to produce good programs, and the unresolved question of long-term financing of media in minority languages. Panelists found that state or public media did not reflect the views of the entire political spectrum and often did not serve the public interests of minority groups. This contributed to a drop in the overall rating for this objective to 2.50, from 2.71 in 2005. Most

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE AND OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens' access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

An understanding of the role of public-service media continues to evolve, and panel members criticized the degree to which money is spent for market competition with commercial media. They attributed the situation to failures by personnel, rather than the system. "The question 'What is the role of public service?' still waits for an adequate answer in Serbia," said Nadežda Gaće, president of the Independent Journalist Association of Serbia.

highly assessed for this objective were the affordability of news sources, the unrestricted access to media, and the performance of independent news agencies. The lowest mark reflected the lack of transparency of media ownership.

Unquestionably, there is plurality in the affordable public and private news sources in Serbia. There are no restrictions on domestic or international media, although the relatively low circulation of print media is a consequence of the circumscribed buying power of citizens. Key dailies such as *Politika*, *Danas*, *Blic*, and *Vecernji Novosti* and weeklies such as *Vreme* and *Nin* offer a wide choice in print media to complement the less robust regional and local print market. In broadcasting, the public RTS and private stations such as Pink, B92, and Fox Televizija represent a large broadcasting sector.

A more important question is raised by the position of public-service media, panelists said. The number of state media is diminishing, and the news program is viewed as improving at Radio Television of Serbia (RTS), with more diversified viewpoints included. However, panelists said that other purportedly "public-service" programs are not as good. An understanding of the role of public-service media continues to evolve, and panel members criticized the degree to which money is spent for market competition with commercial media. They attributed the situation to failures by personnel, rather than the system. "The question 'What is the role of public service?' still waits for an adequate answer in Serbia," said Nadežda Gaće, president of the Independent Journalist Association of Serbia.

Among the viewpoints raised were that radio is generally well done and, on the whole, the situation with public-service media is improving, but more effort is needed, especially in the areas of cultural and educational programming. The problem posed by overstaffing at state media continues,

with the surplus put at approximately 1,500 employees. Some panelists suggested that there was room for further objectivity at RTS TV news and that RTS's financing system is inadequate even though it is privileged as the only station with three different income sources—the state budget, obligatory subscriptions, and commercial advertising. "Further survival of the imbecilic financing of RTS will force public service to commercialization," said Žanetić, marketing specialist with MOSAIK Marketing Agency.

The MSI panel focused on local areas, saying that too often the state media were not reflecting the views of the entire political spectrum or the activities of civil society but mainly the local ruling party or coalition interests. "The problem is... the too-crowded media environment and state ignorance about programs of interest for citizens," said Vladković, editor-in-chief of OK Radio in Vranje. "The problem is not in differences among the media; it is more in their similarities. In local areas, they are all transmitting the same news." The evaluation of RT Novi Sad, the public-service broadcaster of Vojvodina, was similar to that of RTS, with commercial considerations high on the agenda.

The performances of the independent news agencies BETA and FONET were considered strong, with their main challenge being the difficulties that many potential media-outlet customers had in being able to pay for agency services.

Independent national broadcasters are producing high-quality news programs, panelists agreed, but local media in the regions are more often producing low-quality news programs under the heavy influence of local authorities. "State-owned media are tragic regionally," said Vladković. "In local municipalities, they are loudspeakers of local authorities. They are not informing; they are advertising authorities that are paying them."

The lack of transparency in ownership was due to inadequate regulations, panelists said. According to provisions in the media law, no foreigner can have more than 49 percent ownership of media in Serbia. As a result, a large number of lawyers become the owners of media, listed in the public register to mask the real ownership. This is especially true in the case of two new television stations that get licenses from RBA: TV FOX and TV AVALA. The lack of transparency leads to a general mistrust and lack of credibility of media outlets, also opening them to criticism of their editorial policies.

Though the laws are good in defining minority interests, the implementation is not adequate. MSI panelists suggested that there is no real interest in minority problems among media or among politicians. RTS was cited as being especially prone to ignore detailed coverage of minority concerns, while TV Novi Sad was considered somewhat better in this area.

OBJECTIVE 4: BUSINESS MANAGEMENT

Serbia Objective Score: 3.07/4.00

Serbia's media sector is showing significant improvement in its business-management practices, and the MSI panel raised the rating for this objective to 3.07, from 2.86 in 2005. About 15 percent of the country's media outlets are public-service and state-owned; the remaining private media are showing improved results, and the competitiveness of the market is growing. There remain some private media that do not have independent editorial policy and depend heavily on the subsidies of an interested backer, with the related drop in professional standards. But for the most part, the private media market is maturing, and income from the media business is growing steadily. The marketing activities of advertising agencies are expanding, especially in urban centers. Research on the performance of media outlets in terms of reach and audience share, supported through media-development programs for eight years, has become an instrument of media management used equally by media managers and advertising agencies.

The media sector's business infrastructure is fair, without discrimination in terms of print media distribution and expanding through mergers and acquisitions that bode well for a more efficient functioning of the industry, MSI panelists agreed.

Media are financed from multiple income sources. For several years, the Serbian advertising market has set the pace for expansion in southeastern Europe. The impressive growth rate continued in 2006, when the real market turnover was \$155 million, compared with \$121 million

INDEPENDENT MEDIA ARE WELL-MANAGED BUSINESSES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

Independent media do not receive government subsidies. Most state-owned media are financed from the government budget, although there are municipalities that do not provide financing to media they own. Panelists said there should be more clarity on financing of minority-language media.

in 2005. "Advertising agencies are much more active than previously," said Žanetić, marketing specialist at MOSAIK Marketing Agency in Belgrade. "The newest trends are good, the prices are rising, and TV will earn more with diminished advertising time."

The structure of advertising spending also is improving. It is expanding beyond television, with more money going to print media, which are increasing the number of pages devoted to advertising. "The revenue from advertising is growing much better than revenues from selling of newspapers and magazines," said Žarković, director and editor-in-chief of the *Vreme* weekly in Belgrade. The drop in the number of television stations with new frequency allocation practices and the limitation of advertising time imposed by the new media law has served to divert advertising investment to other media forms and also has increased the price of advertising. Expansion of advertising to local markets also is ahead, panelists said.

Independent media do not receive government subsidies. Most state-owned media are financed from the government budget, although there are municipalities that do not provide financing to media they own. Panelists said there should be more clarity on financing of minority-language media.

Market research is used to develop media company strategies, and more progress was recorded by the MSI panel. In 2006, as in previous years, the number of media actively using research results for their business operations increased.

The registration of circulation figures still does not exist in Serbia. Most print media do not publish figures or are thought to be manipulating the market with incorrect data. This contrasts with the situation in broadcast ratings both for radio and television, which the MSI panel thought to be much better, reliable, and developed with transparent methodology.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Serbia Objective Score: 2.79/4.00

The functioning of the supporting institutions for Serbia's media sector continues to be stable, with the MSI rating for the objective unchanged from the three previous years at 2.79. This covers media industry associations, NGOs, supporting the media, and distribution channels. The education of journalists is improving, although it is far from perfect and still in need of serious reform, panelists said. Several participants suggested that the media-support institutions are the parts of the Serbian media environment that function the best. There are several efficient organizations that supply media with different services, such as legal help, professional education, and marketing services. On the other hand, panelists said, media institutions are defending the media environment from further deterioration. The problem is the absence of syndicated representation of journalists.

Several associations, including ANEM and the Independent Association of Media (NUNS), are seriously lobbying for media interests, improved legal provisions, and prevention of monopolization. Another positive trend observed by panelists is that media are pushed into associations more to protect their common economic and industry interests than for political reasons. Observed Goran Vladković of OK Radio, "not only are media associations honestly advocating for media interests, they are also the guarantee that the Serbian media will not fall further into the abyss."

Clear improvement in the activity of NUNS was recorded by the MSI assessment. The activities of the ethics council were

a great leap forward. Also, the prompt reaction to attacks on journalists and active involvement in public debates on media realities made NUNS an even more useful association than before, panelists said.

Panelists were divided in assessing the role and support of NGOs. Some thought that the NGOs were not adapting to the real world, which is not so black and white anymore. There is an essential difference between NGOs in Belgrade and those in local municipalities. Any weakness observed in NGOs should be understood in the context of the fact that there are 5,600 NGOs in Serbia, and most of them, especially in local areas, are representing civil society well and cooperating effectively with media, panelists agreed.

The Faculty for Political Sciences is still producing journalists without practical knowledge, according to the MSI appraisal. Vesna Sladojević, deputy editor-in-chief of Radio Television Serbia, said "young journalists coming from the Faculty for Political Science-Journalism department are not capable to work on any complicated task." Some improvement is evident, and some educational institutions are using professionals from media to teach students on practical aspects of journalism. Also, there was good improvement in equipping faculties, and students are now using modern equipment in the learning process. In the past year, significant interest among young people for journalism study was recorded, however Dragoljub Žarković of *Vreme* noted "In the last year, there was a huge interest of young people for journalism study, but most probably for the wrong reasons."

Short-term training is the traditional form of educating journalists in Serbia and is mainly financed by donors. Those trainings introduce new professional skills to many journalists and media outlets in Serbia, panelists said.

There is no apparent discrimination in newsprint supply or in printing services, and there are many sources of both.

Channels of distribution are functioning on market criteria, except where there is a state or business monopoly. RTS continues to dominate transmission of broadcasting through its infrastructure, with continuing concern over this state of affairs.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists' rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

Panel Participants

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Darko Bročić, Director, AGB Nielsen, Belgrade

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