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CROATIA

W“We’ll sweep you out, as soon as we get the power.” This sentence, said by a senior member of parliament’s opposition club during a debate on public television, resonated in media channels for days. It was a worrisome indication of the concept of public television service, reducing it to a mere tool used by “us” against “them” (whoever “us” and “them” may be) that still exists, even at the highest level of executive power. It was also the grand finale of a year of continuing worrisome trends in the media industry, even if overall Croatia’s score remains practically unchanged compared with last year.

Indeed, one may say that the media sector cannot be exempted from the overall state of the Croatian economy, in decline for the seventh consecutive year. But the fact is that the media sector has felt consequences beyond most other businesses. “It would be fair to say that in 2007 salaries in media were proportionally higher than in other sectors,” said Zdenko Duka, president of the Croatian Journalists Association (CJA). “Since then, salaries of media professionals have dropped more than in any other field,” he added. In the same period (2007–2014), the number of employees in print media contracted by 40 percent, and circulations were halved, while local radio stations experienced a staggering 80 percent drop in advertising-generated income. The media failed to adapt their business models or prepare any “survival kits” in the early stages of crisis, but it is questionable whether even the best model would have been able to help the media weather the crisis.

Of course, it is not only about income, salaries, and other financial indicators. It is about the concept of media freedoms (at least, by the standards adopted in the early 2000s or, more formally, standards that should be applied and respected in an EU member state), which came into question throughout 2014.

A national commercial television station has been fined HRK 50,000 (\$7,000) for broadcasting a live interview with the prime minister because the mayor of Zagreb (now under investigation for serious corruption allegations) considered it “offensive.” The station was punished for publishing (verified) facts on a private company involved in a huge financial scheme with public funds, because the judge found it “offensive” and “not relevant to the public” under the new criminal law on “vilification”—clearly a worrisome development.

At least one indicator has a positive trend: there have been no physical attacks on journalists for a while. This is by all means good, and it even called for a satirical twist: as Saša Leković, a freelance investigative reporter, said, “There’s no need for physical attacks on journalists. Conformity and self-censorship are more efficient in disciplining the media.”

CROATIA at a glance

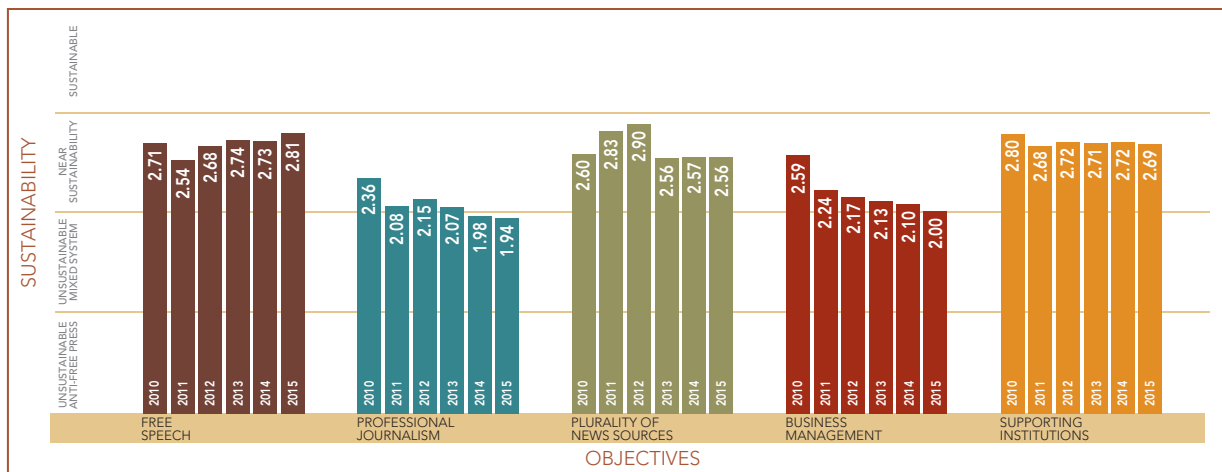
GENERAL

- > Population: 4,470,534 (2014 est., *CIA World Factbook*);
- > Capital city: Zagreb
- > Ethnic groups (% of population): Croat 90.4%, Serb 4.4%, other 4.4% (including Bosniak, Hungarian, Slovene, Czech, and Roma), unspecified 0.8% (2011 est. *CIA World Factbook*)
- > Religion (% of population): Roman Catholic 86.3%, Orthodox 4.4%, Muslim 1.5%, other 1.5%, unspecified 2.5%, not religious or atheist 3.8% (2011 est. *CIA World Factbook*)
- > Languages: Croatian (official) 95.6%, Serbian 1.2%, other 3% (including Hungarian, Czech, Slovak, and Albanian), unspecified 0.2% (2011 est. *CIA World Factbook*)
- > GNI (2013-Atlas): \$57.12 billion (World Bank Development Indicators, 2014)
- > GNI per capita (2013-PPP): \$20,830 (World Bank Development Indicators, 2014)
- > Literacy rate: 98.9% (male 99.5%, female 98.3%) (2011 est. *CIA World Factbook*)
- > President or top authority: President Kolinda Grabar-Kitarović (since February 19, 2015)

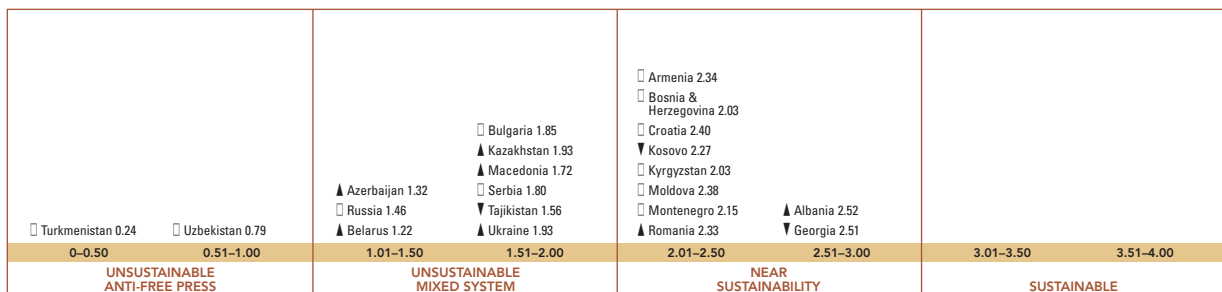
MEDIA-SPECIFIC

- > Number of print outlets, radio stations, television stations: 10 major daily newspapers; four major political weeklies; Radio: 158, 6 of which are national; Television Channels: 31, 10 of which are national, 119 web portals (as of June 2013)
- > Newspaper circulation statistics (total circulation and largest paper): The total circulation of daily papers is estimated at 300,000 copies a day, the top 3 being tabloid *24 sata* (circulation 80,000), *Večernji list* (circulation 55,000), and *Jutarnji list* (circulation 40,000); the highest circulated political weekly is *Globus* (8,000 copies)
- > Broadcast ratings: Top 3 television stations: Nova TV (private/commercial), RTL Croatia (private/commercial), HRT 1 (public TV)
- > Annual advertising revenue in media sector: Approximately \$310,000,000
- > News agencies: HINA (public), IKA/Croatian Catholic News Service
- > Internet usage: 2.234 million (2009 est., *CIA World Factbook*)

MEDIA SUSTAINABILITY INDEX: CROATIA



MEDIA SUSTAINABILITY INDEX 2015: OVERALL AVERAGE SCORES



CHANGE SINCE 2014

▲ (increase greater than .10) □ (little or no change) ▼ (.10 decrease greater than .10)

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.

Scores for all years may be found online at http://www.irex.org/system/files/EE_msiscorers.xls

OBJECTIVE 1: FREEDOM OF SPEECH

Croatia Objective Score: 2.81

Is EU membership an ultimate guarantee that issues related to media freedom are leaning irreversibly toward the highest standards? Not at all. Before Croatia joined the EU, one could say of its newly-minted EU neighbors: “Look at Hungary or Slovenia; their media freedom has deteriorated recently.” After Croatia’s EU accession in July 2013, can one say: “Look at Croatia?” According to the MSI panelists, this is not yet the case, as Croatia’s score in Objective 1 remains roughly unchanged compared with last year. Yet signs that this could be the case marked events in 2014.

It is not about the basic standards of freedom of speech and the legal framework: Croatia recognized freedom of speech as a cornerstone of democracy a long time ago—first as a model, in the early to mid-1990s, which it began to implement in the late 1990s and early 2000s. The long and exhaustive EU negotiation/accession process additionally shaped the framework and aligned it with EU standards (*acquis communautaire*). The constitution, media, and media-related legislation clearly define and protect freedom of speech. Professional associations and NGOs are alert when it comes to any violations of free speech. Freedom of speech has become a truly internalized value, and it is almost impossible to imagine any state of emergency that

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 or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > 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 available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets’ access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

Leković asked, “Why would anyone beat a journalist when so many subtle measures to control them abound?”

would deny it. But, the overall impression is that there is a certain fatigue when it comes to media freedoms as a process; it is not a goal to be achieved (or even, already achieved). Indeed, in a time of almost painful economic and social crisis, it is not easy to get the general public to focus on the miniscule details of media freedom issues.

But it is more than that. Paradoxically, many indicators in Objective 1 are rated better than in previous years, but the overall feeling is that this objective, along with Objective 2, is the main reason for serious concern over the state of the media.

“The government has obviously decided to keep and even intensify repressive measures against journalists,” said Boris Rašeta, a journalist for the minority paper *Novosti*, referring to the new criminal law on “vilification.” “Even if it were only about a mindset, it is highly disappointing,” he added.

Croatia’s minimal licensing requirements apply only to broadcast media that use a limited public good (radio and television frequencies). Formally, the licensing body is the Agency for Electronic Media, commonly referred to as the Regulatory Agency. Unlike the 1990s and early 2000s, when frequency allocation fell under either direct political control or, in the later phase, under the political and/or business lobbies’ influence, for some time now frequency allocation can be described as transparent enough. However, according to Viktorija Car, a professor at the Faculty of Political Science/Study of Journalism, appointment of Regulatory Agency members is still not completely immune from political influence. Still, Jelena Berković, an activist and spokeswoman for the watchdog NGO GONG, said, “The main obstacle no longer concerns control or any other undue influence. Nowadays, it is about the Regulatory Agency’s lack of expertise or understanding of the media sector. However, the consequences are the same—frequencies are still denied to those who deserve them.” For example, the regulator still prefers mainstream commercial radio to alternative radio stations, which operate predominantly in the form of web radio. This is not about any political affiliations; it only reflects the regulator’s opinion that alternative radio stations cannot survive on the market, when at least in the capital city there should

be room for one or two alternative (in terms of music and values) radio stations. However, the agency processes broadcast licensing applications in a timely manner, and there is an appeals process in place as well. Other media (print/electronic) are required only to register themselves and disclose their ownership structure.

When it comes to taxation and market entry, “the media industry is in a better position than other businesses,” said Ante Gavranović, a senior media analyst. Indeed, there are no special requirements in terms of founding capital or taxation for media entrepreneurs interested in entering the market. On the contrary, some media sectors (daily newspapers, for example) enjoy a super-reduced VAT rate of five percent (the standard VAT rate for most other products and services is 25 percent), which raises a legitimate question: Why only print media—and if only print, then why only daily newspapers? Although the overall impression is that this indicator stands relatively strong, there is still room for additional improvements, especially given the dire position of the media industry in general.

Crimes against journalists in Croatia declined over the past few years. “More good news is that judges now take verbal threats against journalists a bit more seriously as well,” said Duka. For example, a court in Croatia’s second largest city, Rijeka, sentenced a drug dealer to eight months in prison for a death threat against a local journalist last October.

But the panelists’ predominant view is that the pressure on journalists must be seen in a different light. Leković asked, “Why would anyone beat a journalist when so many subtle measures to control them abound?” Gabrijela Galić, a journalist and former trade union activist, added, “Isn’t the complete uncertainty of jobs and salaries more dangerous when it comes to journalists’ integrity than a physical attack or threat?”

Most of the panelists remember well the late 1990s and early 2000s when a number of international experts, with all of their collective experience and goodwill, worked on models to transition the state television to a public service. Protecting editorial independence was, of course, at the top of the agenda, along with restructuring the massive apparatus into an efficient and manageable entity. Emil Havkić, a lawyer specializing in media issues, was involved in the process, and commented, “We have tried many models. Something was always missing.” It is not easy to define this “something,” but now, many years later, it seems quite possible that a “best model” simply does not exist. So many locally specific ingredients are needed, as well as general replacement of the “best model” concept with “best

practices.” As an EU member state, Croatia has accepted all basic elements defined by *acquis* in securing an editorially independent position of the public service.

Still, MSI panelists identified a number of serious objections to the current Law on Public Television. Berković thinks that legal stipulations concerning the appointment of a general manager expose public television to potential political influence/pressure. “We have suggested the introduction of a two-thirds majority of the MP votes for appointing a public TV general manager. But, the ruling party prefers a simple majority. This has made the public TV more vulnerable to political pressure,” she said.

Public television in Croatia enjoys a very high (almost 96 percent) collection rate of the subscription fee/tax levied on the public. Regardless of the considerable drop in advertising revenue (from 40 percent of the overall budget five or six years ago to less than 15 percent today), the current budget should be enough to allow stable operation. Public television’s financial viability is much more about internal non-transparent budget spending and “uncoordinated usage of available resources” (as Sanja Mikleušević Pavić, a public television editor, rightfully pointed out) than about any “outside” pressures. Public television is not necessarily (or by legal stipulations) a desirable communications channel. “But it is only logical that public TV would get information easier than a small local station. It is not about discrimination; it is simply about reaching every household in the country,” said Tena Perišin, a public television editor and professor of journalism at the University of Zagreb.

Most aspects of indicator 6 are in line with higher expectations, but one specific detail spoils the picture. Namely, libel has been a civil issue for a while. However, as of January 1, 2013, the new criminal offense of “vilification” was introduced (defined as “systematic and deliberate” defamation of a certain person, institution, or legal entity). The year 2014 saw the first charges for “vilification.” As mentioned in the introduction, a well-known investigative reporter was fined (although the case may be appealed) for “vilification” after she presented facts on a business entity involved in a financial scheme, simply because the judge decided that these facts were not of public interest. In other words, a journalist can be prosecuted even if reporting only verified facts if the judge thinks that the published facts are not “in the public interest.” This is a clear and worrisome act of regression, the panelists agree. “We reacted almost immediately and asked the legislature to amend this article using fast-track procedures,” Duka said. “But the legislature

obviously has no intentions to do it.” “Actually, it is sad to see that not only daily practice, but a legislative framework as well are ever further away from our own vision of media freedoms,” said Milan Živković, adviser at the Ministry of Culture.

There are no legal regulations that would favor one media outlet over another in terms of access to information. As mentioned under indicator 5, it is, for example, only logical that a bigger, national media outlet has better access to information than a “small,” local media outlet. But, the problem is a more general one. Right of access to information is well-defined, but it takes the government or governing on all levels to be responsive and responsible to make this right function properly. Although some panelists have seen improvements in the government’s communications with the public, the main problem is that the administration does not see the public as a fully-fledged partner in a democratic process. “The government wants to reduce the public down to the passive recipient of information on the decisions made, rather than to treat and involve it as an active partner in the process,” Berković said. The prime minister, too, often refers to himself as to a “statesman,” another panelist said. “Apart from any kind of applied psychology, I see it more as a message from ‘above’ saying, ‘We know better what’s good for you; if you interfere or criticize, you might spoil the big design,’” he added.

Access to local, national, and international news sources is open and unrestricted. Internet service is available and ever more affordable—even for rural areas. A quality Internet signal covers 99 percent of the territory. In relation to this indicator, the panelists noted problems only with respect to intellectual property and copyright standards. Although the EU accession reinforced these issues, in practice Croatian media fall short of international standards.

No license is needed to enter the journalism profession. The government has no means to exclude anyone from reporting or practicing journalism, or to influence and/or control entrance to journalism schools. The accreditation process should be more efficient, but the panelists could not name any attempts to deliberately prevent a media professional from reporting.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Croatia Objective Score: 1.94

An anonymous, internal survey conducted by the Ministry of Culture in July 2014 that some panelists had seen showed that 42 percent of journalists believe they have “less time to collect information and prepare stories” than at any other time in their experience. In addition, 47 percent feel that media freedom is “in decline,” while an alarmingly high 76 percent reported that ethical standards are “less respected than before.” Sixty-one percent of journalists described the influence of big advertisers as constantly rising; 86 percent see a direct link between media owners and certain business lobbies, while a staggering 90 percent admitted to facing pressure to “fabricate” stories. These sentiments are mirrored by panelist scores in Objective 2 over the years, as Croatia has been on a slow downward trajectory.

Combined with the utter insecurity of jobs and the fact that 68 percent of employed journalists report working overtime without pay, a picture emerges that leaves little room for optimism. In short, journalists have no time, no money, no incentives, and, very often, not even the inner drive required to produce good journalism.

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 and retain qualified personnel within the media profession.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exist (investigative, economics/business, local, political).

“We call it ‘Google Journalism.’ But there is something even worse: younger journalists usually do not even ‘dig deeper’ than opening one or two Google pages,” said Dražen Klarić, managing director of one of the leading daily papers in Croatia.

“Most journalism today is superficial, sensationalist, tabloid-style, and copy/paste,” said Mikleušević Pavić. “There are still a number of good journalists and investigative reporters, but they mostly belong to an older generation of media professionals. That is not only because it takes experience to become a good reporter. It is because younger generations of journalists are not following professional standards,” she added. “We call it ‘Google Journalism.’ But there is something even worse: younger journalists usually do not even ‘dig deeper’ than opening one or two Google pages,” said Dražen Klarić, managing director of one of the leading daily papers in Croatia. “I can’t remember the last time a journalist called me to verify and check any information in relation to my field of expertise,” said Anja Picelj-Kosak, a media specialist at the U.S. Embassy in Zagreb. Perišin added that the situation is worsening, commenting, “If you happen to read daily papers at some European airport and then Croatian papers back home on the same day, it would be like two different worlds,” she added. “Only seven percent of Croatian journalists have ever tried to obtain an official document from a local or central government. To me, that says much more about the quality of journalism than [does] any other qualitative or quantitative indicator,” said Leković. “Recently, I read the following sentence in papers: ‘The prime minister and his government have passed the law.’ How can I trust journalists and editors who do not differentiate between the executive and legislative branches?” said Car.

Consulting experts is still standard practice for Croatian media, but typically the same people are quoted over and over again. “Experts are chosen mostly to confirm the position of the journalist, not to offer a variety of opinions,” said Perišin. “When you see the name of the expert, you know what the author wants to say,” she added.

The Code of Ethics developed by the CJA is considered to be one of the best-elaborated documents of its kind. The leading international professional association recognizes it as such, and it is often used as a point of reference for drafting codes of ethics in other “new democracies.” Some of the bigger media have their own codes of ethics, aligned with the best examples of leading global publishers. “It is impossible to have one approach to this issue,” said Klarić. “There has been a notable progress in, for example, protecting children and minors’ rights in media, respecting dignity of victims or, for example, not disclosing names of protected witnesses. But the level of defamation and hate speech on the web is beyond any acceptable standard,” he added. “I know it may sound blasphemous or contradictory to the principles of free speech, but I wouldn’t mind criminal prosecution of these journalists, or so-called journalists. After all, it is really not about journalism; it is about the deliberate promotion of hate speech,” Leković said.

“We should be aware that a minority of journalists today are either not aware of more elaborate ethical standards, or they simply do not care about them at all,” said Duka. But it is not only about breaches of basic elements of the ethical code. “The level of advertorials has become really worrisome,” said Car.

Just weeks before the MSI panel, a major publisher in Croatia changed ownership, handing the reins to a wealthy Croatian lawyer. The media announced the change almost immediately. Only a couple of days later, the front page of the leading media company’s daily paper featured a huge photo of the mayor of Zagreb, Croatia’s capital, “celebrating his birthday modestly, with only his closest friends.” What is missing in the picture? Only two important details: The mayor of Zagreb had just been released from custody (under allegations of a multimillion-dollar corruption scheme) after paying \$4 million bail, paid privately by his lawyer, who holds lucrative contracts with the city of Zagreb and had just become the owner of the paper in question.

This is a pretty obvious example of mixing ownership and editorial policy (or more precisely, using editorial policy only as a long arm of the owner). It is the key to understanding indicator 3 on self-censorship: journalists and editors, as the survey showed, are painfully aware of the business interests of their owners and their connection with different lobbies and pressure groups and are increasingly trying to anticipate the interests of media owners. Politicians are second-class players in this game.

"The media cover all key events—provided they do not concern the church, war veterans, or the biggest advertisers," said one panelist, with sarcasm. Indeed, mainstream media are not so fond of these topics (that still "divide the audience," as they would say), but this does not mean that there is a list of forbidden topics. "If not mainstream media or public TV, some other media will pick it up. It is impossible to sweep any issue under the carpet," Picelj-Kosak said. "True, but for me, the fact that mainstream media do not recognize these topics as important is alarming," said Car. "There is almost no space for international politics in our print media, apart from the agency news," added Rašeta. Indeed, the times when a publisher had eight or nine correspondent offices around the globe are long gone. Now, it is mostly about covering Brussels, but even this is done without any in-depth analysis of EU policies relevant to Croatia. "Croatian media correspondents in Brussels typically wait for our prime minister so they can ask him, in front of the EU institutions, about domestic policy," said Perišin. The panelists agreed that Croatian media are still mostly reactionary on events, missing opportunities to open serious public discussion on important social and political issues, such as the very low percentage of usage of EU funds, bankruptcy law, high unemployment, depopulation of Croatia, or lack of a consistent foreign policy. Tens of web portals and social media platforms are alert to jump on any wrongdoings, but a lack of detailed background information and a relatively low audience limit their reach.

In 2014, journalists earned about 20 to 25 percent lower than in 2007-2008. Journalists' salaries, relatively high for decades, are now just in line with salaries in other comparable professions, such as health care and education. However, salaries for other professions (e.g., government institutions, health, or education) might be a bit lower than in media, but they are regular—whereas journalists, especially in local media, sometimes go unpaid for months.

Standard monthly salaries now fall in the \$1,000 to \$3,000 range, while an average of \$1,200 could be considered an industry standard. Some journalists and editors make far more, but many journalists, especially in local media, make less than \$1,000 per month; some earn only \$500 to \$600. "Young journalists are in an especially dire position. They are exploited to the maximum but cannot even raise their voice for fear of being instantly replaced by those willing to work even harder for even less money," Berković said. Furthermore, nowadays it is practically impossible to earn a living as a freelancer.

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Generally speaking, there is a balance between news/information programming and entertainment. The leading private broadcasters in Croatia recognize news production (though not necessarily high-quality news production) as commercially viable and attractive to audiences. In addition, all commercial broadcasters are legally obligated to produce news. But, national commercial television stations are not legally obligated to present 45 minutes of news during prime time. They do, however, because they know it is marketable. Also, giving credit to public television, it introduced a new public channel that broadcasts 24 hours of news, favoring the active balance between news and soft programming.

Facilities and equipment for gathering, producing, and distributing news are efficient and easily available. Quality Internet services are available and becoming more affordable.

As for specialized reporting, Leković commented, "It seems that no media need quality specialized journalists anymore... Even business and culture pages are slowly disappearing from the mainstream media, which would have been unimaginable only a few years ago," he added. "The lack of specialized reporting has a devastating impact on our profession. There are no specialized journalists among younger generations. Quite often, they rely on expert opinions not to improve the quality of reporting, but to cover up their own incompetence," said Klarić. Indeed, investigative reporting has almost disappeared from mainstream media, keeping its presence mostly due to some internationally financed projects. The journalism community missed opportunities to provide investigative reports on topics such as corruption, or at least the nontransparent use of public funds in the health system. "Investigative reporting is expensive, it takes time, and it's risky for media owners. It is on its way to extinction," continued Klarić.

OBJECTIVE 3: PLURALITY OF NEWS

Croatia Objective Score: 2.56

A plurality of news sources seems guaranteed, with 158 active radio stations (152 local and regional radio stations and six radio stations licensed nationally), 31 television channels (21 local and regional and 10 national), more than 800 registered print publications (among them, nine national dailies and about the same number of relevant weekly and biweekly publications), 170 registered web portals as of December 2014, 1.4 cell phones (predominantly smart phones) per person, and almost 60 percent of the population on Facebook and Twitter. Indeed, Croatia's score in this objective has held steady over the recent past and is nearly identical to last year.

Despite that, Car observed, "Plurality of media does not necessarily extend to plurality of news." Different opinions do not necessarily improve the quality of public discourse; the merit of issues discussed is part of the equation, too. Živković agreed, with an additional argument: "The most visited web portals simply mirror print news content. This is not about plurality of news; it is more about plurality of media and communications platforms," he said.

Most other panelists disagreed, however. "We do have a choice of news and information throughout the political and societal spectrum—from left to right, from liberal to conservative, from mainstream to alternative. All points of view are covered. Even if I were to advocate that the Earth is

flat, I'd find the media to cover it," Klarić said. "I don't even have to move from my armchair to get all the news I want," added Havkić. "Newspapers are a bit expensive, but there's enough available information on free-to-access platforms for any type of interest," he added.

Indeed, Croatia has one of the highest percentages of households using IPTV platforms in Europe, which have recently become available via satellite in all rural and remote areas (see Chapter 4). "News follows you wherever you go," said Krešimir Dominić, a public relations specialist. Social media networks are well established, with an already rich history of social engagement—namely, the first "Facebook" protest in Croatia (organized by high school students) took place back in autumn 2008. Locally organized Facebook protests successfully helped remove corrupt politicians, as in Sisak County. Two of the most successful political projects in Croatia in 2014, involving mostly young people, were "Orah," based on ecological issues, and "Živi zid," social movement against evictions and the power of banking and other financial lobbies.

In terms of citizens' access to domestic and international news, there are absolutely no restrictions. That has been the case since the late 1960s and early 1970s, when most of the western part of the former Yugoslavia (e.g., Slovenia and Croatia) watched Italian and/or Austrian television channels. International broadcasters (BBC World Service, Voice of America) have been allowed to broadcast freely since as early as the mid-1950s. International press, available since the late 1960s, began serving millions of foreign tourists, but later turned into a legal and legitimate source of information for local readership. The government does not block or restrict Internet access, VOIP services, or social networks in any way. After all, any such initiative in an EU member state would simply be unimaginable. New regulations (as explained under Objective 5, indicator 8) have efficiently erased any substantial differences between accessing news in urban and rural areas.

It would be difficult to find a single media consumer in Croatia who is satisfied with the public television (HRT) service. Objections run from allegations of partisan reporting, a lack of flexibility in breaking-news situations, and excessively high monthly subscription fees (1.5 percent of the average salary) to a lack of sports and commercial programming. "We are aware of these objections. It is hard, if not impossible, to meet the demands of such a heterogeneous audience. In my opinion, our biggest problem is lack of management coordination in using our own resources," said Mikleušević Pavić. Regardless of the shortcomings detailed above, HRT is still seen in Southeastern Europe (and even beyond, including Hungary, Slovenia, Slovakia, Czech Republic, and Poland) as a model

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens' access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the 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
- > The media provide news coverage and information about local, national, and international issues.

of a successful transition from a state-controlled to a public-service media with respectable audience ratings and even financial stability.

Despite oft-repeated allegations of “politically charged” reporting on public television, the panelists do not find it obvious. “Politics is, of course, always present, but more as a background than as an intention. My impression is that this government is perhaps not interested, but definitely not capable, of controlling public service,” said Klarić. “It really comes down to different lobbies and fractions within the public TV itself, rather than to any serious attempts to control it by one single political option,” said Perišin.

As a credit to the public service, the launch of the commercial-free 24-hour news channel definitely shows that the public service wants to play its public-interest role, even though it is not always sure of the best approach.

There is only one general service news agency in Croatia (HINA), aside from the Catholic news agency (IKA), which is predominantly oriented to its own market niche. “To my surprise, HINA is becoming more flexible and market-responsive in the services it provides,” said Živković. The development seems to be a consequence of HINA’s exposure to market conditions, after years of being financed exclusively by public funds. Although struggling with financial problems, HINA offers its services to media (especially local media and smaller newsrooms) at very competitive and affordable prices (basic service starts at as low as \$30 per month). But, the competition is tough: bigger publishers have launched their own news and photo agencies, while local radio stations have turned more to radio networks as sources of information. Foreign news services are available under no restrictions whatsoever but are prohibitively expensive even for most major national media.

A specific stipulation in the Croatian Electronic Media Act obliges all local and national private commercial broadcasters to produce their own news programming. So, the answer/comment on indicator 5 could be a short and straightforward “yes.” But usually, there are more layers to be unfolded. National private broadcasters have found from the very beginning of their Croatian presence that the news programming is not only mandatory, but that the news also could be commercially profitable and used as a tool to attract the audience. News production (on national commercial television stations) is closer to the definition of infotainment indeed, although they keep the public service under a constant pressure to be more accurate and more flexible (especially in live onsite reporting). “Commercial television stations offer news that is oriented more to

“We do have a choice of news and information throughout the political and societal spectrum—from left to right, from liberal to conservative, from mainstream to alternative. All points of view are covered. Even if I were to advocate that the Earth is flat, I’d find the media to cover it,” Klarić said.

attractive and crisp presentation than content quality, necessarily. But they are encompassing bigger audiences than the public service. Whether the overall impact is positive or not, it is still too early to say,” Car commented.

Unlike national broadcasters, local radio and television stations have not identified commercial potential in news programming. “Why should we as local commercial broadcasters be obliged to a certain quota of news production?” asked Miljenko Vinković, owner of a local television station. But his comment did not draw many nods from the MSI panel. Most panelists think that broadcasters—whether national or local, private or commercial—as users of the finite public good, should have a certain responsibility toward the public, including news production. “This is part of their license contracts, not something imposed on them,” said Toni Gabrić, publisher of the web portal H-alter.

Online media do not depend heavily on big advertisers and/or political lobbies, and some actively produce their own content. But the majority of online media outlets and bloggers do not have the capacity to produce their own news. A limited number of bloggers and online media outlets, however, are more open in exposing wrongdoings.

Indicator 6, on media ownership transparency, is a bit too complex for any straightforward answer. In October 2014, the European Commission organized a consultative conference on the transparency of media ownership, and Croatia was held up as an example of “good practice” in this regard. Still, most of the panelists would give rather low marks to this indicator. “Plurality of news exists, but nontransparent media ownership compromises it. Audiences cannot check whether the information is balanced against the interests of the owner of the media that published it,” said Mikleušević Pavić.

In fact, both impressions are correct.

Disclosure of the ownership structure is mandatory for all media, and this information is available to the public (online for electronic media or in the public registry with the Chamber of Commerce for print media). However, transparency of ownership as such has its own limits. The panelists agree that it is absolutely important to insist on this legal norm but think that this definition is already obsolete. “Nowadays, it is more important who controls the owners than who nominally owns the media,” said Živković. Indeed, two or three major (foreign) banks are keeping the most relevant print and some electronic media in Croatia afloat on their will and can cut the financial lifeline at any given moment. Does the public have the right to this information? The panelists think that such vital financial data, as well as a list of nominal owners, should indeed be made publicly available. When it comes to foreign capital investments in the media industry, the panelists think that foreign investors have deserved credit for consolidating the Croatian media market and trade standards (although not contributing much in terms of quality of content), as well as for making a clear line of division between politics/politicians and editorial policies.

Issues related to social, sexual, and ethnic minorities are relatively well-covered in mainstream media, although still primarily in relation to certain events (such as the Pride Parade, which puts LGBTIQ issues in the limelight). Unfortunately, this (along with reporting on national minority issues) usually brings a burst of hate speech, which is not always or necessarily limited to marginal web portals. Minority-language media in Croatia (or specialized content/productions on minority languages) are well-established, with elaborate mechanisms for subsidizing this sector (from direct government financial support, support from respective foreign governments, and the so-called Fund for Pluralization of Media, alimented by three percent of the subscription fee to the public television service).

Some minority-language media are almost exemplary among their own kind, such as the daily paper in Italian, *La voce del popolo*, which has continued for 70 years, or the weekly magazine *Novosti* (published by the Serbian National Council in Croatia), which has become one of Croatia’s leading weekly papers, content-wise, and goes well beyond its “minority” mandate.

OBJECTIVE 4: BUSINESS MANAGEMENT

Croatia Objective Score: 2.00

“Recently, I’ve met representatives of a group of local media. They told me that they were operating on a basis of three-month financial plans. No more strategic planning; now, it is about mere survival,” said Berković. Indeed, there isn’t much left of the glory days of the late 1990s and early 2000s, when some of the “home-grown” media companies, started in the late 1980s or early 1990s and based more on enthusiasm and vision than on financial investments, were rightfully considered as proud examples of the successful Croatian entrepreneurship, well beyond the media industry. The score for Objective 4 this year is the lowest for Croatia since the MSI began there in 2001, and it is down to a 2.00 from a high of 3.39 in 2005.

Now, Croatia is poised to enter its seventh year of a recession that has literally halved circulation figures and advertising income (Živković estimates the total daily sold print circulation at some 300,000 copies, which is merely a third of what it used to be in late 1990s). Since 2007, the print media industry, as already mentioned, has lost 40 percent of its jobs. The end of the crisis is not in sight: in 2015, zero growth would be considered a success, while even more optimistic analysts do not foresee reaching 2006-2007 figures (in terms of revenue and employment) before 2025. “Such a persistent crisis in the media sector is a result of a combination of a contracted advertising market and media management incapable of coping with a new market

MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > 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.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

environment. In the initial phase of the crisis, some print media managers had tried to fight the downward circulation trend by trivializing the content, which resulted in the loss of trust in media and a further drop in circulation," said Gavranović. "Most Croatian media do not have crisis management; they are managed by crisis," said Rašeta.

Media in Croatia do generate income from a multitude of sources, although these sources are more and more reduced in their overall volume. "Sales figures for print media have dramatically declined, but the share of sales in comparison to advertising revenue has increased. This alone shows how low the advertisement income has dropped," said Gavranović. In practice, this means that less money can "buy" more content or minutes of programming—and more influence than ever before. "The media have become more dependent on advertising income, making the sector more exposed to direct or more subtle forms of pressure," said Gabrić. "The only serious advertisers in Croatia are retail chains, pharmaceutical and cosmetics industries, and mobile phone operators. They have a status of 'untouchables' in the media. Who dares to criticize them? Only marginal web portals with no real influence, and with no advertising at all," said Leković. Last year, the panelists elaborated on the "pyramid of fear" phenomenon. Because 2014 only accelerated the process, it is worth repeating what the "pyramid" refers to: *Journalists fear they will lose their jobs. Editors fear they will lose their positions with owners. Owners fear losing advertising income.* Taking into account (unfortunately) realistic expectations about the stagnation of the Croatian economy and financial sector not coming to an end before 2020, the positions of the biggest advertisers remain strong—at the expense of editorial independence.

Croatian legislation has some country-specific elements that are designed to provide local media with the financial resources needed for their public function. As mentioned, three percent of the subscription fee for the national public radio/television service goes to the so-called Fund for Promotion of Plurality and Diversity of Electronic Media, which supports "productions of public interest" on local commercial radio and television stations. The Fund has an annual budget of some \$6 million to \$7 million, providing project support of up to \$120,000. The model was initially designed to promote quality productions, employment, and self-sustainability of local commercial radio and television stations but has since become sort of a lifeline for a major part of local broadcast media. As Miljenko Vinković, owner of a local television station and representative of the National Association of Television Stations, put it, "Should the Fund cease to exist tomorrow, we would be out of business the next day." ("Out of business" refers to broadcasting any content other than purely cheap/

"Most Croatian media do not have crisis management; they are managed by crisis," said Rašeta.

commercial material.) The fund is partially based on "positive discrimination," giving an advantage to media or specialized productions in minority languages.

Local governments are still involved in the ownership structure of a significant percentage of local media. It is obvious and almost self-explanatory that media with a local government ownership structure (which usually includes benefits such as free-of-charge or under-market prices for office/newsroom space) are generally not considered to be prone to criticism toward the authorities they live off—even though this type of criticism, along with providing local service information, should be their core activity. The same goes for most of the local media, including those that are 100 percent privately owned: most local broadcast media, regardless of their ownership structure, have contracts with local authorities that subsidize, or entirely finance, some of the local information production. The financial crisis has nearly devastated small and medium-sized businesses and service providers and—consequently—dramatically affected the local advertising pool. In 2014, for example, local radio stations claimed a loss of almost 80 percent of the advertising income generated in 2007.

Public radio and television can thank well-elaborated regulations and fee collections for its steady income. A relatively efficient control has been established over the public fund's spending, which allows more transparency than before. For example, public television is not permitted to use public funds to purchase purely commercial content; public money is primarily aimed at supporting/buying productions in the "public interest," while commercial revenue is free to be used to purchase any type of commercial production or sports rights. However vague this definition may be, it has brought much more transparency to the way in which public money is spent. It has contributed to a more balanced market as well: only recently, public television did not manage to get the rights to broadcast the world handball championship (one commercial television station had a better offer). A few years ago, that would have been an unimaginable situation: public television would simply match (with public money) any offer by a commercial station. Such market distortions are less frequent than before.

The biggest international advertising agencies, such as McCann Erickson, BBDO, and Grey, have dominated the Croatian advertising market ever since the mid-1980s and

early 1990s, building on local expertise and an openness to the concept of advertising that dates back to the 1960s. Advertising agencies efficiently cover media by type (print, broadcast, web, and, increasingly, social media) and coverage area (local, regional, national). Taking into account the dire financial situation of most local and national media, one could say that the advertising agencies (and, for that matter, public relations agencies as well), regardless of the almost dramatic contraction of the overall advertising volume, have actually increased their influence on the market. "It is not always easy to access the media. Once you do it, the media will do whatever you ask them to do," said Dominić.

Advertising revenue as a percentage of total media income remains in line with international standards. "On average, print media make some 55 percent of their income from advertising and around 45 percent from sales. This is, in general terms, in line with international standards," said Gavranović. "But distribution of the advertising market is different. Globally, the television market consumes about 40 percent of advertising, while in Croatia this percentage goes up to 75 percent," he added.

This is also the main reason for the still relatively strong market (and financial) position of national commercial television channels. "They do not make as much as they did before, but they are not in the red, which allows them to invest in production," Gavranović said.

Private media do not receive government subsidies or subsidies from any other public source, aside from the support already mentioned from the Fund for Pluralization of Media or some minor funds from the Ministry of Culture. Some other regulations (for example, a stipulation that at least 15 percent of the advertising budgets of public companies and government campaigns should go to local commercial media) would intentionally also contribute to the local media budgets, although this stipulation has not been fully—if at all—respected and implemented.

"Most media are simply desperate to feel the pulse of their audiences. They would do everything to adjust their content to what they see as the market demand," Dominić said. Although surveys follow higher industry standards, it matters more how media "decode" these findings; nonetheless, fine-tuning of their content, as a result of hard facts or "decoding" of them, usually brings out more trivia and infotainment than quality productions.

Leading international companies in the field of surveys and ratings (such as AGB Nielsen) have been present in Croatia for years and have set standards for all market participants. Broadcast ratings are reliable and precise. "But they are hideously expensive and therefore available only to a small number of financially viable media," said Mikleušević Pavić.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Croatia Objective Score: 2.69

Objective 5 scores have held steady in the past several years, although they are lower than in the first half of the last decade when international funding supported local institutions at a higher level and Croatian media were better able to support them financially. Still, Croatian organizations play a vital role in the media ecosystem.

The CJA is more than one hundred years old (more precisely, it marked its 104th birthday last December). As such, it represents an almost unparalleled continuity in defending basic principles of the profession—whether keeping the media freedom torch lit in times of authoritarian and dictatorship regimes or promoting higher professional standards in, at least by definition, a plural and democratic environment. The panelists paid their respect to MSI Croatia veteran panelist Gavranović, whose role as CJA president in the early 1990s was crucial in preserving the Association's unity and avoiding divisions along political, ideological, ethnic, or any other lines. This was of the utmost importance, making the CJA much more than a journalists' association. Throughout the turbulent 1990s, CJA was an efficient and internationally respected combination of professional association, trade union, and human-rights watchdog organization.

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

But what about today? Has CJA managed to keep its pivotal position in times when basic professional standards are once again at stake—not as a result of dramatic, tectonic political and geopolitical changes, but rather as a consequence of a merciless, enduring financial crisis?

“CJA promptly reacts to each and every instance of journalists under pressure or attack. But we have to face the reality: there are ever fewer independent media, driven with the public interest as their only agenda. The profession is in crisis, not so much due to external factors, but generated predominantly by the media sector itself,” said Duka, the CJA president. Not all of the panelists agreed. “CJA has failed to offer journalists support when they needed it the most. Hundreds are losing their jobs, while the Association remains silent. Why don’t you offer free legal assistance to your members as you did in 1990s?” Berković asked. “It is not that easy anymore. In the 1990s, we had a clear set of goals,” said Gavranović. “This time, the crisis has been generated primarily by the market itself and unparalleled changes in the way the media content is consumed. It’s about a global change; it would be rather unfair to blame CJA or any other media professional or trade association for that,” he added. “CJA is what we as members make out of it,” Klarić concluded.

Going back to figures, the fact is that the CJA’s membership has been in decline for the past five or six years. This period coincides with the shrinking professional base (as mentioned, the print media industry has lost 40 percent of its jobs), but also with a steady rise of journalists working part-time or on vaguely defined contracts—therefore, not meeting CJA’s membership standards. With the younger generation of media professionals, those lucky enough to get full-time employment are painfully aware of the transitional nature of their jobs and are not interested in joining any professional organization. “‘Trade union’ is an unknown term to them,” said Galić. “This makes both sides weaker: journalists, because their rights are not protected, and the trade union, because it has fewer members,” she added.

But it is not only about CJA. “We should not forget that other professional or sub-professional associations have been very efficient in promoting the interests of their members. The Association of Publishers has successfully lobbied to adopt a super-reduced VAT rate for daily papers, for example,” said Gavranović, one of the founders of the publisher’s association. Local commercial television stations are coordinating their lobbying activities under the National Association of Television Stations, and local radio stations and other media outlets are coordinating their activities through the Croatian Association of Radio and Newspapers (which has just celebrated its 50th anniversary). National

“CJA has failed to offer journalists support when they needed it the most. Hundreds are losing their jobs, while the Association remains silent. Why don’t you offer free legal assistance to your members as you did in 1990s?” Berković asked. “It is not that easy anymore. In the 1990s, we had a clear set of goals,” said Gavranović.

commercial television stations have their own association, while web portals have organized themselves as well—and actively lobby for their interests. In general terms, professional associations are well-organized, and their activities are well-elaborated.

The moderator’s impression is that the panelists tended to be a bit more critical discussing indicator 3, which focuses on NGOs, than they should have been. Indeed, interaction and cooperation between the media and NGO sector is not as active as it was, for example, 15 or 20 years ago. The democratic deficit in the 1990s logically set the lowest common denominator for the majority of media and human-rights NGOs—that is, in the promotion of higher standards of human rights and media freedoms. There were no problems in reaching consensus on that point. Nowadays, the situation is much more complex. “There are more than 50,000 registered NGOs in Croatia, covering the whole spectrum—from leftist anarchists to the extreme right,” said Berković. “Reaching consensus, even on basic, substantial issues, is simply not possible anymore,” she concluded. In addition, many of the former heroes of the independent media have compromised their position, making the question legitimate: ‘If the supposed controllers of the power turned into the power of itself, who will then control the controllers?’”

For example, Europa Press Holding, Croatia’s biggest publisher, had an important role in democratic changes in Croatia in the late 1990s and early 2000s, only to collapse recently as a victim of oversized ambitions. Radio 101 had a cult status in the 1990s, only to become a standard commercial radio station as a result of a murky privatization process.

Still, the CJA had, and still has, a pivotal role in supporting media’s professional standards. NGOs such as Gong and B.a.B.e. are still active in promoting higher media standards. Without going into the complicated details of such an issue,

it could be concluded that Croatia's NGO sector is active in drafting, amending, and reviewing media legislation, access to information regulations, and other media watchdog activities. However, this symbiotic media-NGO relationship is no longer unconditional, as it used to be in 1990s. After all, this is yet another indication of a more mature democracy and a more complex interplay of different interests.

As for educational opportunities, schools are churning out more graduates than the field can absorb. "The media industry simply cannot absorb any more of our 'production' of journalists," said Perišin. Some panelists consider the situation, in which a profession that offers fewer and fewer jobs seems to attract more and more students to enroll in studies of journalism, inexplicable. "Where are they going to work? For what other purpose can they use the acquired knowledge if they don't find jobs in media and/or public relations—and the likelihood is that they will not?" asked Rašeta. "We have good degree programs and a lot of practical training offered on student radio and television stations, but this is not what employers want. Most of them want disposable copy/pasters, not educated journalists," Perišin said.

Short-term training opportunities are available, but it has become increasingly challenging to obtain permission from editors/owners to participate in the trainings. The situation is even more complex with the local media, where newsrooms are composed of one or two journalists. "Our last training was on video journalism. Many local media owners expressed interest in sending their staff, but I'm afraid it was only because the video journalism concept offered them an opportunity to reduce the number of employees," Dominić said.

Printing facilities, sources of newsprint, media equipment, and other parts of the production and supply chains are apolitical, privately owned, and managed exclusively by a profit-making business model. None of the panelists could remember a single occurrence of declining services due to political criteria or any criteria other than business-related ones, at least not in the past 15 years. Quality print presses in neighboring countries (e.g., Slovenia, Bosnia and Herzegovina, Serbia) are open for cooperation, often offering lower prices for services than print presses in Croatia, which also has contributed to favorable market conditions. In addition, the total capacity of print presses and other services in Croatia surpasses market needs, which also puts the market more in favor of clients.

Regardless of the form of media, distribution of content is unrestricted and open to all under standard market and exclusively business-based conditions. Internet, IPTV, cable television, mobile phone operators, transmitters, and similar services are owned mostly by large international IT and communications business conglomerates and offer professional and efficient access to all interested parties. In addition, as an EU member state, Croatia must implement standard EU regulations in this field, making any political, arbitrary, or non-business influence in this segment highly unlikely.

Yet, there is a problem in the field of print distribution. Namely, the most important national print distributor (which easily falls under the term "monopoly," because it covers almost 90 percent of the market) is owned by Croatia's wealthiest individual, who owns the country's biggest private company, Agrokor. Not only is Agrokor the biggest advertiser, but it also owns the biggest advertising agency. Clearly, attaching the word "biggest" to just one individual does not bode well for market plurality. There has been no indication that the individual in question is using this situation for any kind of political pressure (rather, cynics could say, the individual in question is dictating his terms to politicians, not vice versa). But there are some worrisome "market-related" decisions that are detrimental to the print industry. "Print circulations and the overall volume of sold copies are lower month by month, but the distribution network wants to keep its profit at the same level, raising the profit margin even up to 50 percent. The print industry, faced with lower cover price income and lower advertising revenue, simply cannot stand it anymore. Distribution is suffocating the print industry," Duka said.

Information, communications technology infrastructure, and potentials offered to the market are sufficient to meet the needs of the media industry. Also, the installed capacity of communications platforms is sufficient to meet customers' content and communications needs. Internet streaming of audio and video content, digital broadcasting (99 percent of households have been "digitized" so far), podcasting, content distribution via mobile phones, and so forth are standard and regular market services, introduced in Croatia simultaneously with the global market. Rural areas so far have been a bit neglected when it comes to access to high-tech communications, but the situation has significantly improved. "New regulations require at least one Mb/sec of Internet bandwidth in all areas," said Dominić. "This efficiently erases all the differences in ICT terms between urban and rural areas," he explained.

Prices of IT services have become more affordable as well. The complete IT family package (flat Internet, IPTV, land phone) is available at the initial level of some \$40 per month. This should be considered a fair deal, even when scrutinized under new, crisis-shaped criteria. It is likely that market competition (in combination with mandatory EU regulations) will additionally lower the entry-level costs for access to IT services. As one panelist commented, that is at least one tangible benefit of Croatia's status as an EU member state.

List of Panel Participants

Jelena Berković, spokesperson, GONG, Zagreb

Viktorija Car, professor, Faculty of Political Science/Study of Journalism, Zagreb

Krešimir Dominić, public relations specialist, Zagreb

Zdenko Duka, president, Croatian Journalists Association, Zagreb

Toni Gabrić, journalist, web editor/blogger, Zagreb

Gabrijela Galić, journalist/trade union activist, *Novi list*, Rijeka

Ante Gavranović, founder and former president, Croatian Associations of Publishers, Zagreb

Emil Havkić, lawyer, media legislation specialist, Zagreb

Dražen Klarić, managing director, *Styria/Vecernji list*, Zagreb

Saša Leković, freelance investigative journalist, Daruvar

Sanja Mikleušević Pavić, editor, Croatian Television; president, Croatian Council for Media, Zagreb

Tena Perišin, editor, Croatian Television; professor of journalism, University of Zagreb, Zagreb

Anja Picelj-Kosak, media specialist, U.S. Embassy, Zagreb

Boris Rašeta, columnist, *Novosti*, Zagreb

Milan Živković, media advisor, Ministry of Culture, Zagreb

The following participants attended the panel discussion but did not submit a questionnaire

Martin Mayer, media specialist, EU Representation Office, Zagreb

Miljenko Vinković, director, SRCE TV; deputy president, National Association of Local Television Stations, Čakovec

The following participant submitted a questionnaire but did not attend the panel discussion

Gordana Simonović, member, Agency for Electronic Media, Zagreb

Moderator & Author

Davor Glavaš, independent media consultant, Zagreb

The panel discussion was convened on December 15, 2014.