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SERBIA

Serbia marked 2016 with an overbearing government, poor economic performance, and what many consider the worst year for media in Serbian history. The Savamala neighborhood in Belgrade was mysteriously demolished, with law enforcement refusing to ask how. Protesters viewed the destruction as evidence of the government's lack of respect for human rights. "We did not protest because of destroyed buildings; we protested because in one night, rule of law ceased to exist," one protester said. As of the end of 2016, the perpetrators and ordering party are still unknown. Lastly, political relations with neighboring countries continue to worsen.

In contrast to government propaganda on economic success, Serbia's economy is among one of the worst in Europe. It is the only country in the West Balkans with a GDP still under the level reached in 1990, and it has the lowest average salary in the region. Despite a relatively low 2016 fiscal deficit of 1.6 percent of GDP and a competently planned budget, public debt remains 74 percent of GDP and is a permanent problem. As a condition of a \$1.27 billion loan from the International Monetary Fund, Serbia must sell or shut down remaining loss-generating state-owned firms that have enjoyed state protection. This represents an enormous fiscal risk for the future.

The media sector still suffers from the miserable application of laws. Many privatized or closed media are still under control of ruling authorities (e.g., Tanjug News Agency and Radio Temerin); regulatory agencies and the Ministry for Media are incapable of ensuring the fair application of media laws and maintaining a competitive media market. Independent journalists still face constant pressure from pro-government outlets and government representatives.

Most journalists, media owners, and editors assessed 2016 as the worst in Serbian media history. The MSI panelists gave more individual marks of "zero" this year than total number of zeroes in the previous seven years. Several research studies showed that as many as 70 percent of journalists think their economic status has deteriorated dramatically, and one in two journalists fear censorship. The grim media situation has produced one new phenomena: in the last 24 months, around 50 serious independent analyses of different aspects of the Serbian media sector were prepared; all point to an unsustainable media situation.

SERBIA at a glance

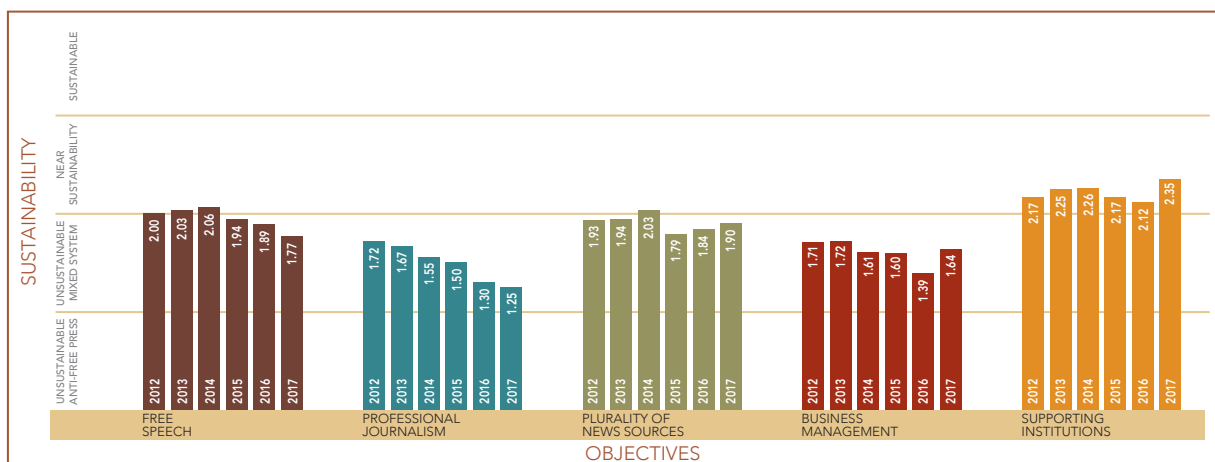
GENERAL

- > **Population:** 7,413,921 (July 2016 est., CIA World Factbook)
- > **Capital city:** Belgrade
- > **Ethnic groups (% of population):** Serb 83.3%, Hungarian 3.5%, Romany 2.1%, Bosniak 2%, other 5.7%, Unknown 3.4% (2011 est., CIA World Factbook)
- > **Religions (% of population):** Serbian Orthodox 84.6%, Catholic 5%, Muslim 3.1%, Protestant 1%, atheist 1.1%, other 0.8%, Unknown 4.5% (2011 est., CIA World Factbook)
- > **Languages:** Serbian (official) 88.1%, Hungarian 3.4%, Bosnian 1.9%, Romany 1.4%, other 3.4%, Unknown 1.8% (2011 est., CIA World Factbook)
- > **GNI (2015-Atlas):** \$39.32 billion (World Bank Development Indicators, 2017)
- > **GNI per capita (2015-PPP):** \$13,040 (World Bank Development Indicators, 2017)
- > **Literacy rate:** 98.1%; male 99.1%, female 97.2% (2015 est., CIA World Factbook)
- > **President or top authority:** President Tomislav Nikolić (since May 31, 2012)

MEDIA-SPECIFIC

- > **Number of active print outlets:** Print: 170; Radio Stations: 364; Television Stations: 250+; Internet News Portals: 20+ (Ipsos estimates), (Several other sources estimate total number of registered media at 1,800+)
- > **Newspaper circulation statistics:** N/A; top three dailies: *Blic* 37%, *Večernje novosti* 31% and *Kurir* 29%; top political magazines: *Nin* 9%, *Nedeljnik* 5%, *Vreme* 4%. (Source: Ipsos)
- > **Broadcast ratings:** top three television: RTS 74%, Prva 55%, Pink 54% (Nielsen); Radio 5 15%, Play Radio 10.2%, Hit Fm Radio 8.5% (Ipsos)
- > **News agencies:** Beta and FoNet (private), Tanjug
- > **News Internet portals:** top three: blic.rs 26%, kurir.rs 13%, B92.net 11% (Source: Ipsos)
- > **Annual advertising revenue in media sector:** €160 million (Nielsen estimate)
- > **Internet usage:** 4.689 million (July 2015 est., CIA World Factbook)

MEDIA SUSTAINABILITY INDEX: SERBIA



MEDIA SUSTAINABILITY INDEX 2017: OVERALL AVERAGE SCORES



CHANGE SINCE 2016

▲ (increase greater than .10) □ (little or no change) ▼ (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 <https://www.irex.org/msi>

OBJECTIVE 1: FREEDOM OF SPEECH

Serbia Objective Score: 1.77

Most independent analyses and public discussions, as well as surveys and reports on freedom of speech, agree that 2016 offered the worst year in Serbian media history. While the Serbian Constitution and 2014 media laws guarantee freedom of speech, once again, implementation was poorly enforced. Panelists agree that the media situation is dramatically bad, but do not concur on the degree. Most panelists, especially those directly involved in media production, such as journalists, editors, and owners, feel the situation explicitly worsened in 2016, while others feel the situation in 2016 is of the same magnitude as the prior year. In Serbian media, the atmosphere of fear, censorship, and self-censorship is prevailing. Society does not value the constitutional right to free speech and media, and when rights are violated, it is often challenging or impossible to get legal help. Serbian authorities use different tactics to silence investigative reporters and media critical of the government, for example unleashing tabloids they control to malign media outlets and individual journalists.

Laws are consistent with international standards of human rights and freedom of expression, but the laws are not always enforced. Tamara Skrozza, a journalist with *Vreme* weekly, said, "Unfortunately, freedom of speech has become practically a nonexistent category. During all of 2016, anybody who tried to speak critically about the government and prime minister found him or herself on the front pages of authority-

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.

controlled tabloids with serious accusations of destruction of the constitutional order, with no reaction from state authorities or institutions, even the Ministry for Media was silent. By allowing the violation of basic human rights, the state is stimulating the suppression of freedom of speech."

Srđan Bogosavljević, the regional public affairs research director for Ipsos, said, "Laws, even when they are ideal, are always much better in theory than in practice. Occasional scandals around media leave far stronger effects than normal media activities. Self-censorship is often practiced, and, most likely, it is directly connected to the desperate position of media. Breaking of norms does not occur often, but it is easy to suspect that in such cases political or personal interests stay behind. The laws in implementation are a disaster, and outside pressures are highly informal and cannot be proven because formal state mechanisms are not used." Vladimira Dorčova Valtnerova, the editor-in-chief of *Hlas Ludu (HL)*, said, "Constitutional norms in Serbia guarantee freedom of speech, but the state does not actually tolerate the practice of freedom of speech. Legal provisions do not defend or promote freedom of speech because their application is limited to a level that meets the government's interest."

Marina Fratucan, a television production editor for UrbaNS studio, offered, "The way RTV [Radio Television of Vojvodina] Public Service's management were dismissed proves that media laws enable such practice. The Regular Authority for Electronic Media elects the management board of the public service, which is fully controlled by the politicians in power. So everything is done according to the law, and we got a ruling-party public service instead of citizen's public service. The research done by the Independent Journalists Association of Serbia [NUNS] has shown that instead of a public service, we have a public service of the ruling party, worse than last year. Freedom of speech is inversely proportional to the length of [Prime Minister] Vučić's rule. We've gone from a relatively free media, earned after a hard struggle, to mostly non-free media." Stevan Dojčinović, the editor-in-chief of KRIK, added, "The situation is worsening compared to last year, and authorities are strengthening pressure on media."

There were several negative developments in the legal environment in 2016. Siniša Isakov, councilor of the International Department for RTV, said, "The negligence of the media sector is seen from the fact that for more than half a year, there was no assistant minister for the media nor a secretary of state for media. The Ministry, in almost an entire year, had only six people dealing with daily tasks, and they were not able to prepare a new media strategy. The old media strategy expired on September 30, 2016."

In 2016, there were neither formal signs of any new four-year media strategy preparation by the Ministry nor an evaluation of

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Predrag Blagojević, the editor-in-chief of *Južne Vesti*, said, "At the beginning of the year, two men were charged for threatening journalists. The prosecutor's office later dismissed the criminal charges because saying 'the journalists should be set on fire' falls under freedom of speech and is not a threat."

the completed one. Media institutions and associations missed initiatives regarding a new strategy. Only the Organization for Security and Co-operation in Europe's Mission in Serbia initiated an analysis of previous achievements and worked on developing proposals for a new a strategy.

State authorities also directly opposed laws previously enacted. The state-owned news agency, Tanjug, had previously been closed, but remains active on the market. Additionally, authorities have announced their intention to reassess state ownership. Shortly after the April election, the director of RTV was fired, prompting the resignation of the editor-in-chief and general director. Later, dozens of journalists were fired, and several shows were taken off the air. The RTV board of directors, a group that consists of ruling-party members and sympathizers, initiated the dismissals and placed acting leaders in place of those dismissed or who were fired. While acting leaders at public service media are supposed to remain no more than six months, managers and editors remain "acting" for years, which is another means of pressure on media.

The activities of the broadcast regulator, the Regulatory Authority of Electronic Media (REM), are not compliant with the media laws passed in 2014, so all decisions can be challenged. With manipulations in the election process of council members, the REM Council is nearly an arm of the ruling party. There were two small positive changes as it relates to minority media: the editor-in-chief and director of minority-language media are

no longer appointed by the National Council of Minorities, a political body, but rather by a minority media managing board. The second important move forward in 2016 was the adoption of a new law on advertising.

In 2016, REM finally became the focus of criticism. At several domestic and international media conferences, critics pointed to REM as the weakest aspect of Serbian media. The European Commission's evaluative document assessing 19 indicators, including transparency, efficiency, and impartiality of the regulatory body, determined that REM fulfilled almost none of them. REM is not even fulfilling basic tasks of analyzing electronic media-sector development or solving operational problems, and it does not regulate the market to ensure fair competition. Instead, REM deflects responsibility by claiming it is not in charge.

Isakov said, "Our regulator, REM, does not make decisions in a matter that is responsible." REM is not even publishing obligatory reports and is essentially not present in media problem solving, despite the fact that 14 pages of the 49 total pages of the Electronic Media Law are devoted to REM activities. Specifically in 2016, REM was in the spotlight for not publishing the long-awaited report on media behavior during the election campaign. REM is obligated by law to ensure all participants in the election campaign advertise under equal financial and technical conditions. The obvious political interests prevented REM from publishing the report, despite urgings from media associations and the public. During the year, a third Radio Television of Serbia (RTS) channel appeared, as well as Antenna Plus TV, the joint venture of the two public companies ETV and Telekom Serbia without any inclusion of REM in the process. Additionally, 26 television channels and 5 radio channels were introduced without permission. Isakov said, "The role of REM is completely unclear in assessing the multiplex for terrestrial broadcasting of the newly formed company Antenna Plus. In particular, it is doubtful whether it is in the public interest to fulfill this platform for the distribution of media content."

The farce regarding the election of REM Council members continued in 2016. Immediately before the dissolution of Parliament, the members of parliament, without debate, decided not to elect one of the two proposed candidates from the NGO sector. Zoran Sekulić, the owner and editor-in-chief of Fonet News Agency, said, "Media licensing is biased by the nonactivity of REM, the so-called independent body whose members are elected outside given procedure. REM decisions are nontransparent and are not in line with public interest."

As in 2015, national broadcasting licenses in 2016 were extended without any analysis of the profile or behavior of the media in previous periods. REM also extended the licenses for local media. All of the given licenses last until 2024. Milorad Tadić, the owner and editor-in-chief of the radio station Boom 93,

said, "The extensions of all broadcasters' permits for eight years was done practically incognito, without any analysis of media performance in previous periods and even without checking whether the program is broadcast in practice. I remind you that one national-coverage TV station has a license to broadcast children's programs, but this station only produces reality programs." In some cases, digital broadcasting licenses are imposed on local television stations to cover an area that is much larger than they wish to have; this increases their expenses without providing much benefit.

Skrozza said, "Until the government clarifies the situation with REM, we cannot talk about any kind of legitimacy and legality in the process of granting licenses and electing members of the REM Council. Even the Parliament has prevented the election of two representatives of civil organizations in the council. When REM is in question, no one can talk about legality."

The registration of media in the Serbian Business Registers Agency is also confusing, and it is impossible to detect how many media are active. Sekulić said, "The paradox in the registry is that news agencies are not treated as media units, so we are obligated to register every news agency service as separate. So today, we have two private news agencies and one phantom agency [Tanjug] active on the market, but in the registry, they are listed as 25 different media. I myself am registered seven times as the editor-in-chief in my news agency."

The market entry and tax structure for the media are formally the same as for other industries. Although various tax incentives were strategized, they did not happen in practice. Civil society media have some form of relief, and print media and agencies have a lower value-added tax rate than regular outlets (10 percent vs. 20 percent). Most media pay regular tax liabilities, but pro-government media are often allowed to be late with tax payments, and some even receive resources from the state to settle their tax obligations. Tadić said, "What brings this indicator [Indicator 3] in doubt is the uneven treatment of media units."

One reason for the enormous number of media in Serbia is the inefficiency of bankruptcy procedures. Bogosavljević, said, "Bankruptcy law is not working. There are companies that cannot pay taxes and do not go bankrupt."

Crimes against media professionals are increasing and threats happen more often than are reported. NUNS registered 69 physical and verbal attacks, threats, and acts of pressure or intimidation against journalists in 2016, including 9 death threats. The state response to threats is weak. Although police react, prosecution is often weak or inactive. Dojčinović said, "There is high selectivity in state reactions; they react immediately to threats against politicians and slowly to threats against journalists. This, in fact, is a practical message to journalists that they are not subject to state protection."

In many cases, journalists have been publicly marked as suspects for serious crimes or even as "destructors of the constitutional order." Skrozza said, "Journalists in Serbia feel insecure. They don't know where to expect a new attack, but they know it will come." More threats are coming from citizens mobilized by authority-led campaigns and loyal media against independent journalists. Dojčinović said, "The government influence is directly increasing the threats to journalists, and the number of threats was higher [in 2016] than in previous years." Similarly, there are growing threats to the editors and journalists in the national minority media. The Slovak minority weekly *HL* and its editor-in-chief faced serious threats in an effort by the opposition to shift editorial policy. Both journalists and the editor faced denigration during a weeklong campaign by the opposition.

Tadić offered, "A good example is the journalist Uroš Urošević from Radio Boom 93, who was investigating the quality of drinking water and the water supply in Požarevac. When he announced that the water was faulty, authorities pressed criminal charges. The process is still underway. He published information two weeks before the local government announced that there was an emergency situation concerning the water supply. Press and media solidarity and support from colleagues in other media is absent."

There are two key problems with threats. First, there are no efficient protective mechanisms from online persecution. Attacks against online journalists are orchestrated similar to efficient public relations campaigns. The second problem lies in the criminal justice system. Authorities rarely pursue criminal charges in threats against journalists. Predrag Blagojević, the editor-in-chief of *Južne Vesti*, said, "At the beginning of the year, two men were charged for threatening journalists. The prosecutor's office later dismissed the criminal charges because saying 'the journalists should be set on fire' falls under freedom of speech and is not a threat."

Threats are dealt with only in private litigation. Tadić said, "Journalists, photographers, and bloggers do not feel safe, which produces self-censorship. Journalists who are engaged in investigative journalism are not safe, and we have six journalists in Serbia who have constant police escorts. Several journalists have been beaten, and a journalist in Vršac left the profession after threats and being hit by a pickup truck."

The situation regarding the RTV Public Service in 2016 demonstrates the inability of the law to protect the independence of public media. As noted above, RTV's management and editors were dismissed, and the managing board of RTV, composed of members of the ruling party or people close to the ruling party, cut political shows. REM, whose own ruling council is appointed by the parliament board, which is completely under the Serbian Progressive Party's (SNS)

control, appoints board members. In such a situation, there are no laws that can protect editorial independence. Isakov added, "No conditions are prescribed for board members to have media references or experience, and the only condition is that a member has 10 years of practice anywhere. Such conditions open the possibilities for the ruling party's members to become program controllers with a ruinous effect on editorial independence." Additionally, public services are financed from the state budget. Skrozza said, "The board of directors of RTS and RTV were formally elected according to law but numerous and difficult-to-prove irregularities prevailed: almost all members of both boards are linked to individuals in the REM Council and therefore are automatically under the direct influence of political rulers."

Serbia has decriminalized libel and abolished criminal sentences for defamation. However, libelous statements in media are abundant and often directed toward journalists. Those statements are considered in the civil courts, and while journalists are often ordered by those same courts to pay damages to the other side, the inverse rarely occurs. Skrozza said, "Legal proceedings for libel by journalists are always a year long at minimum. In the recent lawsuit filed by the Minister of Police against the weekly *Nin*, the first judgment has taken place already at the first session, which is extremely uncommon in Serbian courts." This is unique, as most judgments take at least a year to materialize, although an appeal is still possible.

The availability of public information is worsening, as an increasing number of journalists state that institutions refuse to submit information of public importance. The number of complaints has grown from around 6,000 to 7,000 per year. With the increased complaints, the Commissioner for Information of Public Importance is overrun with requests, which further extends the time that needed information can be accessed. Now it is even difficult to get court judgments. Such a practice is essentially putting the Law on Public Information out of function.

Tadić said, "Public information, according to the law, should be readily available to the public and distributed under the provisions of the Law on Free Access to Information that applies equally to all citizens. Journalists know the procedures. The government is legally obligated to dispense public information to the people, but in practice, it's very difficult." Skrozza added, "Although the availability of legal information is formally open equally to all, information from police investigations regularly appears in two or three tabloids and nowhere else. In August, NUNS requested a REM report on media coverage of election campaigns but received no answer until November, when NUNS sent a request through the Commissioner for Information of Public Importance. After the commissioner's intervention, REM responded that no such report existed. They sent a hypocritical

answer despite the fact that such reports had been published for all previous elections and the existence of the report was confirmed by an employee at REM."

In practice, information from public and governmental sources is not equally available to all media and journalists in Serbia. Valtnerova said, "The availability of information from state institutions exists, but when it comes to the availability of 'controversial' information, experience suggests that journalists find it very difficult to receive information of public interest, despite the fact that institutions pay penalties for not giving requested information. Journalists are familiar with the procedures for obtaining information of public interest, but institutions do not respect their rights." The legislation is also inconsistent when minority media is involved. For example, in the Slovak community, because candidates in the National Council elections did not receive money from the state budget, they were not obligated to release reports. As such, the public was deprived of information regarding campaign financing.

The media are not restricted in their access to and use of news or news sources. Media are also allowed to transmit and retransmit foreign and local news programs and information from news agencies. Ferenc Berček, vice president of the Radio Advertising Bureau Association (RAB), said, "There has been progress in this area, but many media outlets still use copy/paste practices without labeling information or sourcing images. The situation is better in the larger cities." Sekulić said, "The use of foreign media sources is not limited by law, but a lot of important foreign news stories are ignored."

Entering the journalistic profession is free, and a license is not required. However, authorities recently tried to introduce definitions of who is and who is not a journalist to turn some people away from reporting. Sekulić noted, "Entering the media profession is free, but there are constant attempts to introduce licensing for journalists. Opinions vary on the matter." Sometimes journalists need permission to report from special events.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Serbia Objective Score: 1.25

Of all five objectives, the objective regarding professional standards received the lowest score. The consequences of a collapsing media sector in Serbia are most clearly manifested in the area of professionalism and quality. Although some traces of the impartial and objective journalism, based on facts and quality sources, can be found in several media (such as TV N1 and Danas, as well as several magazines and Internet portals), an increasing number of journalists and media outlets do not report in a professional or ethical manner. Articles

deviate from the basic rules of journalistic genres, and political or economic interests influence more articles and reports. Journalists and editors practice self-censorship and cover only minor issues instead of major problems. Entertainment obscures news. Journalists' salaries are essentially insufficient for a basic standard of living. Technical facilities are insufficient and outdated. Quality niche reporting is sporadic and isolated.

While some professional journalists verify information with relevant sources, consult experts, and investigate the background of stories, the number of professional reporters is extremely small compared to 10 years prior. Many outlets demonstrate extreme bias. Dojčinović said, "In Serbia, there are two media worlds: print and broadcast, with low-quality reporting on one side and Internet media with lower readership, but improving quality, on the other side. Internet outlets are professional, and they are practicing investigative journalism. Their readership is growing. In the last 18 months, the website KRIK was accessed by 300,000 visitors. The online world is the optimistic side of the media in Serbia." Still, some panelists said television maintains the largest reach and highest influence.

Serbia has a journalistic code of ethics and recently adopted a code of ethics for online media. Both codes are in accordance with recognized international standards, but there is a pronounced trend of noncompliance with ethical standards. Skrozza, who also serves on the board for the Appeals Commission of the Press, said, "Monitoring done by the Press Council on eight daily newspapers registered a dramatic increase in the number of ethical code violations. From March until the end of 2016, there were a total of 5,472 texts in which the code was violated in either one or multiple provisions. In 2015, from April to the end of the year, there were significantly fewer: 3,357." Certain media do not care about journalism ethics: the *Informer* and *Serbian Telegraph* are the absolute leaders in violations. Most often violations involve making assumptions, presenting opinions as facts, and violating the presumption of innocence. There is also an increase in violating people's rights to privacy. Tadić said, "Journalism organizations and associations have developed ethical norms, but standards are not widely accepted and applied in practice. A large number of media very seriously undermine those standards."

Self-censorship is a deeply rooted phenomenon and is therefore difficult to reduce. It is a direct and logical consequence of the media's financial situation. Journalists and editors are forced to practice self-censorship in fear of losing their jobs or in fear of their outlets losing clients, local government support, or even marketing agency support. Editors often put pressure on journalists and photographers to practice self-censorship. Self-censorship is difficult to prove, but it is evidently increasingly present. Fratucan said, "A lot of self-censorship cases are done in order to preserve employment. In the 32 years of my journalistic career in Serbia, I have never agreed to self-censorship. I have

lost jobs several times and have been out of work for long periods."

Key events are reported sporadically, and some topics, such as citizen protests, are present only on social networks and alternative news sites. There are reports on different issues but almost always from a biased point of view. Some events are in general not reported at all. Fratucan said, "There are no stories about situations critical of the government, like protests in May, June, and July in Belgrade and the Novi Sad citizens support of RTV; there are no stories about topics like hunger, unemployment, emigration of the young, corrupt activities of ruling-party members, student protests in Novi Sad, or an objective presentation of the situation in Kosovo." Tadić said, "Journalists are covering key events and issues, but there are cases where editors have prevented journalists from covering an event. The country does not have enough freedom to report on developments regarding security, supporters' group activities, corruption, or the situation in Kosovo, etc. There are certain events that are not covered by the media themselves, but are covered on social networks by citizen journalists or networked social groups."

Media salaries are insufficient for a decent life and are not appropriate for the invested working hours. Generally, journalism is among one of the worst paid professions. Many journalists work for several media companies or other businesses because of low salaries. There is an outflow of people from the journalism profession. A large gap exists between the salaries of professionals in government-controlled public media and private media. Isakov said, "Journalists' salaries in RTV have stagnated since 2008. The government's measures to limit public-sector payments reduced all wages, including editors, who should be independent. Key people, journalists and editors, are paid so little that it is a source of self-censorship."

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.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

Some panelists note that low salaries make journalists susceptible to poor ethical decisions. Skrozza said, "Journalists, both male and female, are bribed, and that is a problem that goes beyond a mere trade union social issue. With a monthly salary of RSD 20,000 [\$172], being a reporter is a wretch in one's own and other people's eyes. Therefore, journalists are very susceptible to corruption. With humiliated journalists, editors can do what they want—give them a task contrary to ethics, standards, and common sense."

There was one point in 2016 when 16 hours of reality programs were broadcast daily on a national television station, leaving very little time for the news. Space devoted to entertainment is dramatically longer than for other media contents. Beside broadcast, print media is also filling space with news about starlets. Serious news is losing ground in all forms of media. The people-meter data shows television viewers are increasingly moving toward entertainment programming. Mainstream media, besides the main daily news, no longer have any informational content, contrary to previous years. There are no debates. A new popular practice is in the radio industry, where one dominant station produces a program and distributes it to a number of other local stations. Local stations simply become instruments to transmit other outlets' stories, losing their individuality.

By transmitting radio news created by other media, they are not responsible for the content anymore and no longer have a need to generate news programs or to hire a large staff. Berček said, "Short messaging formats are attractive to listeners. The news is spread without quoting sources. The media is a generic site. Such radio networks exist in the United States and in other regions. This is a legitimate method. The desire is that the radio will sound like a huge national radio and have short bits of local information." Valtnerova noted that her outlet, *HL*, still emphasizes informative content.

Only certain media have modern and efficient technical facilities and equipment. Many media want to modernize but lack financial resources. Decades of struggling financially have essentially stagnated technical improvements. Tadić said, "There is a lack of capacity and equipment. A lack of proper equipment affects the quality of journalism, but this is not the country's biggest problem." In 2016, purchases of new technological equipment were almost nonexistent. During the analog switch off, when the analog television signal was replaced by digital, there was an opportunity to introduce HDTV programming for the public services, at a minimum, but it was not taken advantage of and the introduction of this service was postponed indefinitely, despite Serbian citizens being equipped with HD receivers. HDTV was introduced in Europe 10 years ago and is now the modern standard. Isakov said, "In 2016, the government again missed the opportunity to help public service

broadcasters procure the modern equipment necessary for direct broadcast of major events."

Specialized journalism and niche reporting continues to suffer and decline. All major media used to have specialized staff covering foreign policy, economy, culture, etc. The vast majority of media today no longer have niche reporters. Two television stations, N1 and Al Jazeera, make some efforts to specialize young journalists. Fratućan said, "When it comes to specialized forms of reporting, two-and-a-half or three decades ago, it was the rule. Today, specialized journalists and programs are very rare." The lack of specialized reporting is evident in the national minority media too. The reasons are the same as in mainstream media: a lack of funding and staff, and sometimes a lack of understanding in the need for niche reporting in specific areas. To some managers/owners and editors, it seems too expensive, or they think their audience does not care for those issues or for investigative journalism. Tadić said, "Some journalists are specialized to cover certain issues, such as health, business, or education, and some investigative journalism exists in the country. There are media that are doing a better job at specialized reporting than others."

OBJECTIVE 3: PLURALITY OF NEWS

Serbia Objective Score: 1.90

Multiple sources provide reliable and objective information to citizens, in part because citizens have access to foreign media, two independent news agencies, and free Internet portals. And while access to foreign media is not restricted, the technological and financial limitations impede the ability of many Serbians to obtain these sources. Another challenge is the lack of diverse opinions within Serbian outlets. Most newsrooms and their editorial policies do not allow for multiple opinions, political or otherwise. The impact of blogs and new media platforms is growing, but most people still view them only as supplemental alternative sources. The plurality of news sources exists but not the pluralism of media content. Public media do not reflect the entire political spectrum, are not neutral, and do not serve the public interest to the extent necessary. Independent agencies collect and distribute news for media companies, but most outlets cannot or do not want to pay for this service. Although media may report extensively on formal events, they do not reflect the wide range of social interests in Serbia.

There are not enough news sources that differ from each other. Editorial policies that allow the expression of different attitudes or insist on multiple sources are rare because editors are unwilling to cover different political standpoints. Citizens can choose any media type, including private, local, or public, but a number of outlets simply copy content from other sources. Websites and social networks, including Twitter, YouTube,

and Facebook, have become common sites to follow news. Bogosavljević said, "Formally and essentially, there is a whole range of sources that provide reliable and objective information. The problem is not the availability of news sources but a 'noise' that is produced by too much media and, among them, those who produce unreliable and poor quality information. This creates difficulties in identifying reliable and objective sources of information instead of deficient sources."

Citizens have free access to domestic and foreign media sources and are able to watch, listen, and read domestic and foreign media content. Both entertainment programs and specialized news programs are at their disposal. Tadić said, "Basic literacy and especially media literacy is the only obstacle to access media content." However, while there are no legal or formal restrictions, low buying power limits access to both domestic and international media.

At the beginning of 2016, in addition to Pickbox, the first over-the-top content platform with localized video content in Serbia, Serbians also gained access to Netflix, the world leader in streaming services with a vast range of foreign media content.

With regard to public media, there are two public services, but they do not reflect the range of the political spectrum. They are not neutral; they favor one political option and the ruling SNS party. Research by the Novi Sad School of Journalism showed that after the May dismissal of editors and journalists, the RTV public service is presenting news dominated by the ruling party and only in a positive light. Programs are not showing the public any existing social, economic, or political problems and have turned into public relations officers. The public outlets avoid serious topics, debates, and broadcasts of parliamentary sessions. The public media outlets, and many private media, spend far more time reporting about the authorities, especially the prime minister, compared with time devoted to other political options.

Skrozza said, "Public services and their programs are under the direct influence of the political elites. That can be seen every day in the program schemes of both public services. One example is a popular morning program of the RTS public service, where every guest is a 'carefully selected' person or analyst who essentially agrees to act as a government spokesman."

Panelists cited the private news agencies Beta and Fonet as satisfactory performers as it relates to gathering and distributing news to media outlets. However, media companies find it difficult to pay for their services. On the opposite side of the spectrum, the ex-state-owned news agency Tanjug is still mysteriously active. By force of law, Tanjug was erased from the register of the active companies, but the state still seems to be financing and enabling Tanjug to offer and charge for services. Tanjug formally stopped working on October 31, 2015,

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.

in accordance with Article 146 of the Law on Public Information and Media.

Sekulić said, "It's all true that the two private agencies are professional, but they are not paid regularly for services rendered...Big media customers blackmail, threaten, and exaggerate the pressure, as agencies cannot afford the loss of big media subscribers. The Serbian news agency market is marked by lawlessness and banditry." Sekulić also added that many smaller outlets simply copy/paste content from news agencies. Tadić said, "Tanjug is another case of incomplete implementation of law. At the end of 2016, we have an active state news agency that was removed from the register in October 2015, and even today, it still exists, sells, and invoices its services. The money allocated to Tanjug by the state is practically destroying equality on the market since the two private agencies do not have access to the same budget sources."

Private media produce their own news and content, but most news is based on information that is not in the public interest or is simply entertainment at best. Some exceptions exist, but they are dependent on limited funding. When private media produce their own informative programs, it often does not differ significantly from public media news. Isakov said, "Only a few of the media in Serbia, in addition to public services, produce their own news content on a very small scale. A lot of media, especially radio stations, only transmit short news items retrieved from news portals, or from other media." Isakov said that many stations download and broadcast wild and unverified information. While not expressly forbidden, the question remains, who is really responsible for the published content? In general, radio news is disappearing. Radio B92, an iconic station that used to boast some of the top news programming

in the country, is now Play Radio, which has only entertainment programming and a high number of listeners.

Despite new media laws, the transparency of ownership in the media is not satisfactory. Tadić said, "Ownership in the media is not transparent enough, because the planned enrollment into the media registry did not bring the expected ownership transparency. There are legal solutions and regulations that require a public statement on the ownership of media outlets, but it is poorly visible in practice. The Serbian Business Registers Agency's information about the owners is not fully accessible to the public. The privatization of media has brought even more confusion, as a number of entrepreneurs have seemingly appeared from nowhere and bought a large number of media outlets in Serbia. The impression is that the state got out of media ownership and gave way to political parties to become media owners."

Ownership in electronic media is clearer than it was a few years ago. Ownership of print media, especially for the dailies *Politika* and *Večernje Novosti*, remains a major problem. A lot of attention, perhaps too much, is given to who owns media outlets, and people often choose what media to consume based on the owner. This distracts people from content and, in general, the importance of media content is given far less attention. Sekulić said, "The law allows international owners from foreign territories. Illegal concentration is a problem, not who is the owner. In Serbia, illegal media concentrations in electronic media are regulated in one way, and in print media, they are regulated in another way. In both cases, the Agency for Protection of Competition refuses to deal with the matter. Today, we have a problem of so-called media pluralism, which should be guaranteed by the Ministry of Culture and Media, but the Ministry does not have the expertise or the resources for that. The protection of electronic media pluralism is entrusted to the famous REM, which has no capacity to do it at all: no tools or knowledge."

Skrozza said, "The media report on gender equality, ethnic discrimination, and various vulnerable groups, but we have more and more 'hidden discrimination' in media contributions produced in good faith with drastic cases of discrimination." Tadić said, "Reporting on a variety of social issues as well as on gender, age groups, ethnicities, religions, and sexual orientations is not often present. Only a few local media cover a wide range of social interests at the local level. It is interesting that in competitions for projects with public interest funding, most proposed projects were about ecology, child creativity, preservation of monasteries and cultural heritage, return of life in villages, population growth, minority cultural heritage... Serious public topics such as crime, corruption, LGBT rights, budgetary spending, strengthening of the rule of law, and violations of human rights were omitted."

While there are many minority groups in Serbia, their respective percentages of the population are low, with Hungarians constituting the largest minority ethnic group at 3.5 percent. That means there is no media market for minority languages, and media outlets cannot survive without state support. During the privatization process, many programs in minority languages disappeared, and the public service RTS consistently does not fulfill its obligations toward minorities and minority-language programming. National minority councils, acting as an extended hand of strong minority political parties, attempt to exert pressure on programming. The most drastic example is a case of the Hungarian national minority daily *Magyar Szo*, whose journalists resisted direct interference of the political party Alliance of Vojvodina Hungarians in their editorial policy—a rare occurrence given the professional standards of many outlets.

Citizens are able to get news and information at a local, regional, national, and international level. There are media, such as TV N1, covering the entire country/region that report professionally on significant news from the whole region. Public services devote little time to local issues. There are some local media (radio and Internet portals) and some independent productions that are bright examples of this. While media can cover news at all of these levels, there are still problems in the quality of the reporting. There is a tendency to publish nonobjective information on international events.

OBJECTIVE 4: BUSINESS MANAGEMENT

Serbia Objective Score: 1.64

Panelists assessed Objective 4 poorly because of the poor economic environment experienced by most media outlets. Only successful media companies have independent editorial policies, and those are rare. Media generate income from several sources but nearly an insufficient amount for normal operation and especially for development. Professional advertising agencies are active on the market and work primarily with television stations with wide territorial coverage. Revenues from advertising in print media continue to drop, while revenue for online media grows. Panelists have different opinions on state subsidies and state advertising; most of them think state advertising is used as a means of placing pressure on editorial policy, although others denied the existence of state advertising. There is some media market research meeting international quality standards, but most media cannot afford to buy results. There is no independent market audit, so market data tends to be less reliable, particularly when compared to broadcast ratings.

Media largely depend on project funding from municipality budgets, something that is not properly organized and can malfunction in different ways. Some media outlets have seen funding systematically blocked. Skrozza said, "From the

beginning, I have seen scandalous organized project financing as a mild form of corruption. The newly established media were given money for completely meaningless projects, and some media were funded for programs that already existed for years." Because media focus simply on survival in a saturated market, professionalism is often left by the wayside.

The research company Ipsos found total media revenues are insufficient to cover costs, as the gross profit per employee in Serbian media is about zero. This opens the door for corruption and self-censorship. Additionally, the media market lacks regulation, further preventing sustainability on the business side of media. Sekulić said, "The media market does not exist. There is a media scene and there is business in that scene, but it has nothing to do with the media market because the rules are not determined by quality, price, or competitive content, but by political and financial centers of power."

Financial flows are fully controlled. Participants are either privileged or marginalized without any connection to the quality of media content or business management. Bogosavljević said, "The media in Serbia have a total advertising budget of an estimated \$160 million, and it is largely disbursed through public tenders or from international companies." Such a small and stagnating budget for 1,800 registered media outlets disables the sustainability of most media.

Both unclear and unstable financing for public services leaves open the possibility of pressure on public broadcasters' editorial policies. Isakov said, "Public service financing was unevenly disbursed from the budget. In the first three months of 2016, both public services got three-quarters of all funds for the year 2016, obviously because of the elections in April." Bogosavljević said, "Too much media, or a shortage of money for so many media, makes media behave in a way that often resembles

trafficking: they do anything to survive." Tadić added, "With too small and unregulated a market, no development planning is possible, and sustainability is an unknown category for most media."

While media have several sources of revenue, so many outlets pushes the demand beyond the quantities at their disposal. The main source—advertising budgets—has been stagnating for several years in a row. Foreign donations have almost disappeared. Lastly, the number of print media consumers is falling, so state budget funds are most attractive, especially after the introduction of project financing for media content that serves a public interest. However, those resources are not disseminated equally: most advertising money goes to television, traditionally the most influential media in Serbia.

Since approximately 2002, Serbia has had a high-quality set of data, comparable to most developed countries, to plan media advertising and for companies to practice a highly profiled budget allocation for advertising. In 2016, according to Ipsos, the average weekly reach of television was 6.9 million, while radio and Internet reached 3.5 million and 4.2 million, respectively. Print media had the lowest reach at four million. Agencies are considered more professional than most media, and they are continuously developing and improving. Vanda Kučera, the chief governance officer with the McCann Erickson Group, said, "The important event for advertisers, the Law on Advertising, was finally adopted and applied May 6, 2016. The profession has seriously progressed." Measurability is of good quality and decisively important for agencies. A yearlong absence of a print media circulation audit has left advertising agencies unhappy, however.

The surplus of registered media influences advertising. For years, advertising budgets stagnated. However, 2016 saw several new developments, including large individual advertisers looking to the region as a unique market. Additionally, advertising is beginning to put in more resources to IT and digital media, although classical media still tends to dominate. Lastly, there was an increase in international clients. All three changes affect the choice of media for advertising.

The participation of different media in actually spent money was as follows: according to Ipsos, the television budget is still 56 percent of total advertising spending, while print is declining at 19 percent and the Internet is at 11 percent and growing. Out-of-home advertising and radio also accounts for 11 percent of spending. A viewership is increasing outside of the home, for example in coffeehouses and bars, thus biasing the people-meter data.

Bogosavljević said, "Most media advertising money is determined according to research data. A major reason why local media have smaller advertising revenues is the fact that there is no data on their performances, and they have a modest

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.

reach. Serious research in local areas is more expensive than the potential benefits for advertisers." Kučera said, "All local media in the region have the same problem. If there is no data, media buyers don't want to advertise. Only local advertisers go to the local media." Up to 40 percent of media revenues come from advertising. If public services are excluded, then this percentage is significantly higher, especially for television media.

Although state financial pressure on private media was mentioned above, it is important to note that panelists did not agree on its significance. Berček said, "The state is still an important advertiser in media and such advertising is used to pressure the media." Kučera said, in contrast, "State advertising doesn't exist...A very small portion of revenues comes directly from state subsidies, excluding both public services, and the distribution of advertising money is always done according to the rules of effective advertising." That said, panelists nonetheless scored indicator 5, covering the state's influence on the media market, as one of the lowest scoring in Objective 4.

Project financing competition is often nontransparent and biased, but without those budget subsidies, most of the local media outlets would be extinguished. While project financing helps local outlets stay afloat, it also makes them susceptible to government influence and pressure. Fratucan said, "The project financing for media, which was introduced by law, is supposed to allow privatized and all other media to remain on the market, but it did not provide planned economic results. It lacks transparent distribution of state budget money, including cases of directing money exclusively to media close to the ruling party, which happened recently with local media competition in Novi Sad." Most panelists argued that in spite of all shortcomings attributed to project financing, without subsidies allocated through this system, most local media would disappear.

Media market research is based on modern, verifiable methodologies and technologies, and it is available on commercial terms without any other restrictions. Audience measurement continues to provide representative results for all of Serbia, but it is insufficient for television broadcasting on the provincial, regional, and local levels. Results indicate that there continues to be an increase in foreign audiences and foreign localized channels. There are no radio ratings measurements; researchers simply use survey estimates.

Tadić said, "Market research available to local and smaller media is very rare and is used more for business planning, but rarely to increase advertising revenue. Journalists and editors 'tailor' their products according to market demands." Market research results are useful for creating media policy, especially for media with national coverage, but this is rare in regional and local media. Fratucan said, "Concerning research results, one serious question arises: How should the professional media follow the requirements of the market and audience desires if research

results show that by far the largest percentage of viewers want to watch *Grand Stars*, *Couples*, or Spanish series? If management and editorial staffs blindly follow the ratings results, the question arises whether serious programs and themes should be excluded from program schemes, because their ratings, certainly in Serbia, would not be high."

Broadcast ratings and Internet statistics are done by experienced and well-known research agencies of high professional standards. The main problem is coverage, because funds are insufficient to research all outlets in a media market of 1,800. Small samples are due to funding, not incompetence or inability on the part of researchers. Ratings reliability is controlled by independent auditors to confirm the research results. Still, many in Serbia believe the research companies are under the influence of the government. Tadić said, "All companies or organizations involved in media ratings and circulation measurement are under pressure from the government, certain media outlets, state institutions, or other interest groups." Serbia has not had a mechanism to measure print media circulation for decades, but Ipsos attempts to measure readership via extended polls.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Score: 2.35

Supporting institutions are traditionally a brighter side of the Serbian media environment. There are associations of owners/publishers, journalists, and industry for those in online, electronic, and print media. In 2016, the need to reestablish cooperation between all journalistic associations was highlighted. NGOs support freedom of speech and independent media, but not to the extent reached in previous periods. There is quality education for journalists, but it does not provide practical experience, and journalists' trainings in the workplace are rare and insufficient. The procurement of media equipment is not politicized, but prices and other conditions of purchase may be a problem. Distribution channels are prone to monopolization, cartelization, and politicization. Information and communication technologies sufficiently meet the needs of media that can afford them.

In Serbia, several associations represent the interests of media owners and managers, including the RAB, the Association of Independent Electronic Media, Lokal Press, and Media Association (for publishers). The organizations mainly propose initiatives to improve media's economic position as it relates to government regulations (for example, tax reductions, reduction in import cost, etc.). The Media Association is continuously organizing seminars, professional and business education opportunities, media literacy courses, and debates on media reform problems all around Serbia. Some other associations organize similar activities. However, some panelists think trade

Fratucan said, “Supporting institutions function in the professional interests of the media, but the intensity of their commitment to media professionalism, the protection of journalists, and the social protection of journalists differs.”

associations still could do more. Sekulić said, “Trade associations representing the interest of media owners and managers in fact insufficiently represent their interests and should be more active.”

The journalists’ associations provide services to their members, offer support, and represent their interests by lobbying and promoting media independence and professionalism. In Serbia, associations are not in the position to be self-sustainable through membership fees or income. Therefore, they cooperate with donors and international associations, and some have support from the Ministry of Culture and Media. Fratucan said, “Supporting institutions function in the professional interests of the media, but the intensity of their commitment to media professionalism, the protection of journalists, and the social protection of journalists differs.” The lack of an effective journalists’ syndicate is a serious long-term problem in the Serbian media sector. In Serbia, there are journalists’ associations, but no other associations of media professionals. There is also no association of editors.

In 2016, two of the largest associations of journalists, UNS and NUNS, failed to agree on a media candidate for the REM Council. Skrozza said, “In my opinion, the responsibility of not having the candidate for the REM Council is not on the two associations but on the political background of the event and

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.

the authorities’ interests.” Tadić said, “The authorities used the radio association RAB to proclaim a candidate for REM Council who is known to be a favorite of authorities. Media associations must avoid competition for primacy and must find common ground to fight in favor of the media and journalists.” Berček added, “Media associations need to overcome the conflicts because their disunity is used by authorities to intensify pressure on the media.”

The associations, especially NUNS and the Independent Journalists’ Association of Vojvodina, are often under attack by tabloids. Because of the current political, economic, and media situation in Serbia, including permanent pressure on media and journalists, associations concentrate all their capacities and activities exclusively on daily “firefighting” and on the resolution of daily problems. Such an environment keeps media associations from executing strategic activities in media and journalism development.

NGOs traditionally support the freedom of the press, and a number of them cooperate and actively support the media sector. Bogosavljević said, “NGOs provide support to independent media, but their impact is limited.” Some NGOs are good partners and are effective in representing media interests, but mostly in the largest cities. Fratucan said, “Interestingly, a large number of nongovernmental organizations complain of weak support to civil society by independent and professional media.”

There is an increase in the number of private media schools but a decrease in overall program quality. Two or three decades ago, there were no media schools outside Belgrade; some schools outside the capital offered occasional journalism classes. Now there are numerous journalism programs through both government-operated and private schools and colleges. Isakov said, “There are high-quality professional journalistic programs, both private and public, but they are not providing practical training to prepare young people to enter the profession. There is no media that routes students to practical activities, and they can’t learn how to control editorial content because student media doesn’t exist anymore.” After leaving school, many young journalists require further training.

Less attention is paid to in-house training for journalists and media professionals already in the industry, in part because of the economic situation and highly commercial media content. Young journalists in Serbia often finance their education and training out-of-pocket, with some attending training courses facilitated by foreign organizations. Bogosavljević said, “Lately, education by traditional schools or through courses offer increased learning possibilities for journalists but without clear indicators of training quality.” Panelists say it is not just young people who need additional training. Isakov said, “There is a large deficit in additional training for editors in light of their

position in the media after laws passed in 2014. The editorial position comes as a logical consequence of successful journalism work, but new editors are often without sufficient knowledge of other topics...the critical issue is the complete absence of education for editors.”

Both trade and media associations organize some educational and training programs, in addition to trainings offered by international organizations. In theory, media support the desire of their employees to participate in training, particularly weekend sessions. Some panelists even argue that there are too many external training opportunities—many of which are out of date. Another problem is that many journalists receive education and training and then leave the industry.

According to the Serbian Telecommunications Agency, one operator, Serbia Broadband (SBB), still dominates the market distribution of television, giving it significant market power with a share of over 50 percent. SBB is also a major provider of Internet access. Broadband Internet, arguably the most important infrastructure for the media’s future, is available for only two-thirds of households in urban areas and 44 percent of rural homes. Isakov said, “In Serbia, the ‘digital gap’ is not diminishing, but on the contrary, it is actually extending with new media that exists only on Internet platforms.”

The largest communication companies on the market invest in both Internet and other media distribution. These companies invested three times more money in the distribution of media content (\$83 million) than in Internet infrastructure (\$27 million). Investments were used more to improve the performances of existing networks instead of expanding the geographic area of networks, especially to rural areas. In 2016, more than one million households in Serbia lacked access to the Cable Distributive System and Internet protocol television or broadband Internet.

Tadić said, “The control of media content distribution is used to pressure media at the state and local levels by authorities, political parties, or businesses. For example, local TV stations do not have fair access to cable networks and digital TV, or sometimes certain newspapers do not appear on newsstands of the distributor ŠTAMPA. Business monopolies that have the potential to control different aspects of media distribution create problems for media houses and journalists.”

Sources of media equipment and printing capacity are apolitical, and there are no monopolies on the market or any restrictions, but prices are sometimes beyond the reach of outlets. Outlets can purchase equipment without any legal barriers. Serbian media offer citizens products such as digital broadcasting, Internet streaming, audio or video, and podcast content via mobile networks (short message service and/or audio-video multimedia messaging service), but they face barriers because of low ICT capacity, including slow Internet connections and

overloaded mobile networks. There are significant differences between ICT capacity in cities and rural areas. Tadić said, “Infrastructure, information, and communication technology meet the needs of media industry, but sometimes there are cases of discriminatory behavior.”

List of Panel Participants

Vanda Kučera, chief governance officer, McCann Erickson Group; president, Advertisers Association, Belgrade

Vladimira Dorčova Valtnerova, editor-in-chief, Hlas Ludu (Slovak minority weekly), Novi Sad

Marina Fratucan, production editor, UrbaNS (independent television production studio), Novi Sad

Tamara Skrozza, journalist, Vreme; member, Appeals Commission of the Press Council, Belgrade

Predrag Blagojević, editor-in-chief, Juzne Vesti (on-line daily); board president, Online Media Association, Niš

Siniša Isakov, counselor, Radiotelevision Vojvodina; professor, Art Academy, Novi Sad

Srđan Bogosavljević, regional public affairs director, Ipsos, Belgrade

Slobodan Kremenjak, lawyer, Živković/Samardžić Law Office, Belgrade

Zoran Sekulić, chief executive officer, FoNet; president, managing board, Media Association, Belgrade

Milorad Tadić, chief executive officer and owner, Radio Boom 93; president, Association of Independent Electronic Media, Požarevac

Ferenc Berček, vice president, Radio Advertising Bureau Association, Belgrade

Stevan Dojčinović, editor-in-chief, Crime and Corruption Reporting Network, Belgrade

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