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SERBIA

Serbian citizens endured another politically turbulent and economically strained year in 2011, despite several positive developments. For example, in March, the Serbian government reconstructed itself, trimming the number of ministries. In May, Hague fugitive Ratko Mladić, the ex-Bosnian Serb commander, was arrested after 16 years of hiding—which made international headlines. Two months later, officials arrested Goran Hadžić, the last Hague fugitive from Serbia; he had spent seven years on the run. In other welcome developments, a professional army replaced the 170-year-old tradition of obligatory army service, and the government passed a new law on restitution that was 11 years in the making.

This progress aside, long-simmering unease over the status of Kosovo escalated, with barricades and clashes rising between Serbs living in North Kosovo and international forces in Kosovo. During the year, Serbs and Kosovo Albanians held eight rounds of talks addressing freedom of movement, parish registers, and other technical problems. The government's refusal to approve a pride parade in September set off more political turbulence, with some interpreting the refusal as government capitulation to the threats of extremists. These events culminated in European Union (EU) leaders denying Serbia candidate status until it normalizes relations with Kosovo.

As in previous years, excessive budget spending and the stagnation of economic development proved to be Serbia's main economic problems in 2011. Serbia reached an arrangement with the International Monetary Fund (IMF) to increase the budget deficit from 4.1 to 4.5 percent of GDP. But the low growth rates produced lower tax collection, leaving the budget on shaky ground for eight years running. The year ended with IMF's decision to postpone implementing the arrangement, from December 2011 to January 2012. Unemployment exacerbated Serbia's deepening debt.

The continuing economic woes seemingly reinforced the government's will to maintain its traditional control over the media, leaving outlets in Serbia very vulnerable to pressures by the state and political and business interest groups. Legislatively, talks for a new media strategy stopped short, while the National Assembly of Serbia passed several regulations that contradict laws supporting media freedoms. The media also saw little progress technologically, and its economy deteriorated further during the year. Pressures, threats, and attacks on journalists and outlets remain common. The court system's treatment of media and journalists continues to be ambiguous, and no murders of journalists were solved this year.

Taking into account all of these issues, the 2012 MSI participants assessed the media situation in the country rather pessimistically: 1.90 compared to last year's 2.06. Scores showed moderate declines in two of the five objectives: Objective 3 dipped most dramatically—more than a third of a point, from 2.27 to 1.93—while Objective 5 decreased by about a quarter point.

SERBIA AT A GLANCE

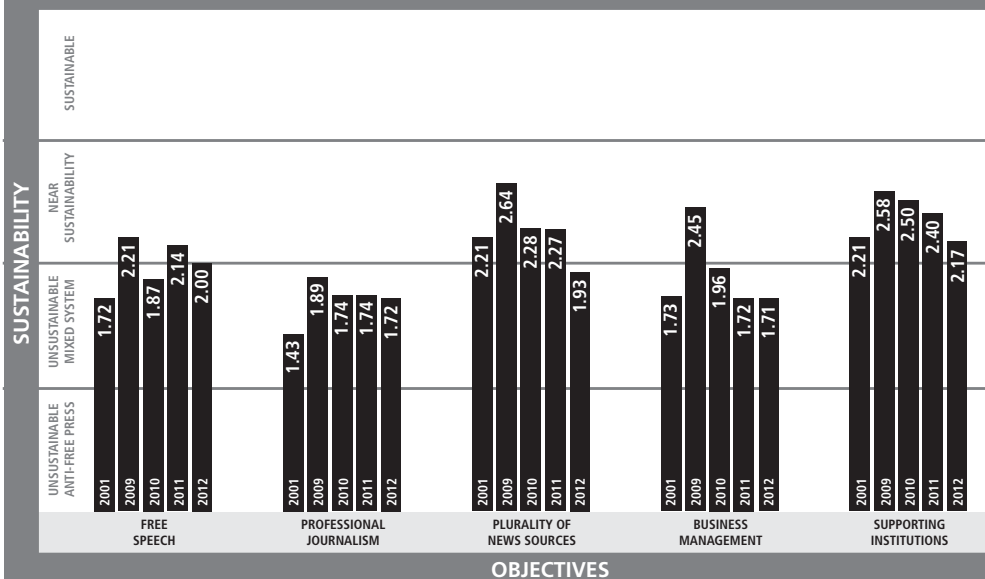
GENERAL

- > **Population:** 7,276,604 (July 2011 est., *CIA World Factbook*)
- > **Capital city:** Belgrade
- > **Ethnic groups (% of population):** Serb 82.9%, Hungarian 3.9%, Romany 1.4%, Yugoslavs 1.1%, Bosniaks 1.8%, Montenegrin 0.9%, other 8% (2002 census, *CIA World Factbook*)
- > **Religions (% of population):** Serbian Orthodox 85%, Catholic 5.5%, Protestant 1.1%, Muslim 3.2%, unspecified 2.6%, other, unknown or atheist 2.6% (2002 census, *CIA World Factbook*)
- > **Languages (% of population):** Serbian 88.3% (official), Hungarian 3.8%, Bosniak 1.8%, Romany 1.1%, other 4.1%, unknown 0.9% (2002 census, *CIA World Factbook*)
- > **GNI (2010-Atlas):** \$42.39 billion (World Bank Development Indicators, 2011)
- > **GNI per capita (2010-PPP):** \$11,230 (World Bank Development Indicators, 2011)
- > **Literacy rate:** 96.4% (male 98.9%, female 94.1%) (2002 census, *CIA World Factbook*)
- > **President or top authority:** Boris Tadić (since July 11, 2004)

MEDIA-SPECIFIC

- > **Number of active media outlets:** Print: 517 print outlets including 20 dailies, 83 weeklies, 6 bi-weeklies, and 72 monthlies; Radio Stations: approximately 186 radio stations (2 public service, 47 regional, 137 local); Television Stations: 173 (2 public service, 5 with national coverage, 25 regional, and 102 local; 39 cable stations); Internet: 172 news and information sites (sources: Republic Broadcasting Agency, Business Register Agency)
- > **Newspaper circulation statistics:** The three newspapers with largest circulation are *Blic* (private, 121,480), *Alo!* (113,840), *Vecernje Novosti* (state-owned, 109,740) (ABC Serbia quoted in *Blic*)
- > **Broadcast ratings:** The top three ranked television stations are RTS1 (public), TV Pink (private) and Prva Srpska Televizija (private). The three radio stations with top listenership are Radio 5 (private), B92 (private), and Radio Beograd I (state-owned) (Ipsos)
- > **News agencies:** BETA (private), FONET (private), TANJUG (state-owned)
- > **Annual advertising revenue in the media sector:** Approximately €175 million: €98 million television, €41 million print, €8 million radio, €6.5 million Internet (2011 est., AGB Nielsen)
- > **Internet Usage:** 4.107 million internet users (2009, *CIA World Factbook*)

MEDIA SUSTAINABILITY INDEX: SERBIA



Unsustainable, Anti-Free Press (0-1): Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2): Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3): Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4): Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

OBJECTIVE 1: FREEDOM OF SPEECH

Serbia Objective Score: 2.00

The year 2011 marked final discussions for the media strategy that the Ministry of Culture developed as the basis for new laws regulating Serbia's media system. However, attempts to advance the talks stagnated, amid the worsening judicial and political treatment of journalists and media outlets. Combined with the economic crisis, this created more challenges for the legal enabling framework for media in Serbia. As a result, the objective score suffered a small setback. As with last year, indicators 8 (media access to and use of other media as sources) and 9 (licensing of journalists) scored more than half a point higher than the objective score, while indicators 4 (crimes against journalists) and 5 (legal guarantees of independence for state media) lagged behind by more than half a point. All other indicators scored close to the objective score.

Although constitutional provisions and several supporting laws protect free speech in Serbia, several longstanding problems escalated in 2011. The national assembly adopted more laws with provisions that contradict laws protecting free speech, authorities continue to unsatisfactorily enforce existing laws to protect the media, and public reaction to threats to free speech remains muted.

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.

UNS president Ljiljana Smajlović added, "Without any investigation, journalists are accused of helping the person responsible for the leak—while that person faces no accusations. Therefore, it is in the first place an attack on free speech, and an attack on the citizens' right to know."

The panelists pointed to four legal provisions that endanger free speech. One is the Law on Electronic Communications, which gives the state the right to control personal communications and identifying details of any citizen. The panelists were unanimous that essentially this regulation derogates the principle of protecting journalists' sources. Also disappointing, the Journalists Association of Serbia (UNS) asked the Constitutional Court of Serbia to assess the constitutionality of the law's provisions, but after a year and the half, the court has shown no sign that it intends to respond.

Another law that panelists said threatens the freedom of speech is the Law on National Minority Councils (adopted by the national assembly in September 2009). "The freedom of speech of minorities is clearly endangered, as minority councils (dominated by minority political parties) are authorized to control their minority media directly," said Slobodan Kremenjak, a media lawyer with Živković & Samardžić. "During the year, the councils replaced a few directors and editors-in-chief for purely political reasons."

The other two controversial laws mentioned are the Law on Local Self-Government and the Law on the Capital City, adopted by the assembly in December 2007. These laws give broad authority to the government of the capital city, Belgrade, and municipalities to establish broadcast stations and print media—which is contrary to provisions of the Law on Public Information that explicitly forbid local authorities from being media founders. According to the panelists, media associations warned the authorities that these unreasonable provisions lead to legal confusion and serious consequences for free speech protection, but no positive reaction followed.

The panelists described several instances in 2011 in which media laws were not enforced. As stated in a law adopted in 2003, the deadline for state media privatization was April 2006 for print and December 2007 for electronic media. But the law was never fully implemented, and the state has still not withdrawn from media ownership. In 2011, a number of local and regional media (including major dailies *Politika* and *Vecernje Novosti*, along with Belgrade's Studio B

However, 2011 saw an exception to this rule: In one case, the High Court of Serbia increased the penalty for two perpetrators that attacked a journalist on a Belgrade bus.

Television) remain partially or fully owned and controlled by the state. Not only has the state failed to implement the law for years, it also fosters a double standard, panelists said. As an example, they pointed to the state news agency, Tanjug, whose government support makes it much more competitive in the market than Serbia's two private agencies, Fonet and Beta.

The panelists described the case of Jelena Spasić as an especially striking illustration of the inadequacy of law enforcement and the state acting against its own laws and internationally accepted standards. Spasić, a journalist for the daily *Nacionalni Građanski* in Novi Sad, was prosecuted along with her editor, Milorad Bojović, for publishing the piece, "Unprepared for War." Although the panelists said that obviously it was published in the public interest, essentially the story was exposing a secret military document that revealed serious problems in Serbia's defense system.

The state accused Spasić and Bojović of failing to disclose the source of the leaked document, but panelists pointed out that if anyone committed a crime, it was the source of the leak and not the journalist—it is not a journalist's job to keep military secrets, they said. Thus, the state's reaction was unlawful in three ways: journalists did not leak a secret, they were within their legal rights to protect the source of information, and they revealed the secret as an act in the public interest. Kremenjak concluded, "As a journalist, you are legally not obliged to reveal your source of information, but when you refuse to reveal it, the state will act against you." UNS president Ljiljana Smajlović added, "Without any investigation, journalists are accused of helping the person responsible for the leak—while that person faces no accusations. Therefore, it is in the first place an attack on free speech, and an attack on the citizens' right to know."

Smajlović also lamented that none of Serbia's political parties protested these acts of oppression against the media, and said she wondered whether the Spasić case is an extreme example or can be read as an announcement of the government's intent to follow a new prosecutorial direction.

In another example of poor law enforcement, the state authorities and the Republic Broadcasting Agency (RBA) proved unable to stop the pirating of electronic media, which

endangers the work of legal broadcasters. According to the Republic Agency for Electronic Communications (RATEL), on July 1, 2011, 47 radio and nine active television stations were operating without a legal license in Serbia.

Panelists agreed that Serbian society reacts inadequately to freedom of speech violations. Typically, political removal of editors and directors, threats to the freedom of speech, prohibitions to individual journalists to enter to public press conferences, attacks on journalists, and trumped-up court cases against journalists are greeted with mild—if any—public reaction. Most criminal acts against journalists are not prosecuted, and those that are prosecuted move at a glacial pace. Criminal cases against journalists generate public protest only rarely, aside from responses from journalist associations, and they are reported in media minimally. State officials verbally attacking and threatening journalists is a serious problem—especially for local journalists, as attacks draw much less public or official attention in regions than in the capital city.

In terms of the fairness of broadcast licensing, during 2011 RBA announced several "corrective" tenders (to replace media that ceased airing) and completed them in a correct and transparent manner and on the basis of projects proposed by the candidates. By December, the first bid for cable networks licenses was in progress. RBA's Gordana Susa said, "The cable sector was not regulated for years, but this year the process started, and it could be assessed as a positive move, as cable channels will be licensed finally."

According to the panelists, the main concern with licensing is that Serbia has too many registered media, as a consequence of very lenient conditions for acquiring a license and the regulation directing RBA to assign all available licenses. By December 2011, RBA had registered 134 television stations, plus 39 cable television and 377 radio stations. By the end of 2010, 517 print media were registered. In total, Serbia has more than 1,000 media outlets for 7.1 million people (or 1 per 6,700 population)—rendering most outlets unsustainable.

On the other hand, some media outlets that have been awarded licenses encounter technical problems in covering their designated areas. The problem of pirate stations, inherited from previous periods, clearly persists. In some cases, pirate media operations even use state-owned transmitters. Although their numbers diminished in 2007 and 2008, when around 60 of them closed, 56 pirate broadcast stations were still on the air in 2011. According to Siniša Isakov, director of RTV Vojvodina, "The state did not show enough energy to solve the problem of media working without licenses."

Isakov also expressed concern regarding the lack of progress with the mandated digital conversion for Serbian media.

Comparing it to the issue of piracy, he said, "The situation with digitalization, which is obviously lagging behind deadlines, is even worse. In 2011, a new company for digitalization was established, but nothing else was done," he said.

Predrag Blagojević, owner of a local Internet daily, *Juzne vesti* in Niš, complained that no regulation of Internet portals exists, while other panelists questioned the feasibility of regulating Internet media. Kremenjak explained that the government has no plans to introduce special rules for Internet media—all media will be subject to the same rules. "For private Internet broadcasters, controversies will be treated depending on the specifics of individual cases ... the important obstacle is that media is defined poorly; i.e. there is no obligation to have editing activity to be registered as a media. During the year, we witnessed a large number of accusations and trials against one well-known Internet media portal, *e-novine*, in spite of the fact that the Internet is unregulated," he said.

Luković, editor-in-chief of *e-novine*, spent a good part of the year in court, facing two cases that reveal stark abuse of the principles of *res iudicata* and the statute of limitations. In 2007, while working as a journalist, Luković wrote a piece on an Orthodox church high official known as a conservative patriot. When the piece was reprinted in the Belgrade magazine *AS*, the priest brought charges against the magazine and its editor-in-chief. The court dropped both charges. But in 2011, the same priest reintroduced charges against Luković over the same piece, and the court is now hearing the case.

The other case against Luković was brought by the famous film director Emir Kusturica, along with others that some panelists described as well-known ultra-conservatives. They are demanding compensation of RSD 2 million (\$24,500) for the article "New Year's Fairy Tale for Murderers." Kusturica claimed that the article, which was taken from the Peščanik website, damaged his reputation and honor. The lawsuit named Luković; the original authors of the article; and B92, which owns the web domain.¹ One famous Serbian writer, Svetislav Basara, wrote in his column in *Danas*, "I do not know what you think, but for me, these private processes against Luković seem somewhat contrived. It seems that the gossip center in Belgrade reached a consensus that Luković has to be shut or at least covered up."

¹See the "Media News Bulletin" of the Media Center Belgrade (founded by the Independent Association of Journalists of Serbia), citing material from Tanjug, Dnevnik, and Blic, June 9, 2011. Available at: <http://www.mc.rs/media-environment.2479.html> (Accessed February 6, 2012).

Blagojević remarked, "Often, police officials from Niš refuse to inform journalists on current events. The police PR officer is at the disposal of a select few journalists. Almost all official authorities insist on written requests, then procrastinate."

In principle, market entry and the tax structure for media are fair and comparable to other industries, but some exceptions exist. For example, the Public Information Law prohibits changing the ownership structure of public media—an obstacle that businesses in other industries do not face. Another discriminatory practice against media continued in 2011: the high, unsustainable taxes that media pay to "their" state institutions, RBA and RATEL. For years, both of these institutions have charged excessive amounts for licenses and their services, collecting from struggling media outlets. The panelists had the opinion that the charges exceed the services that RBA and RATEL provide. Furthermore, both institutions end each year with surpluses, but the excess money is paid into the state budget and spent in ways unconnected to the media. In 2010, RBA's surplus ran \$0.8 million, and at the time that the MSI panel convened in 2011, the projected surplus for the year was \$1.1 million. According to RATEL officials, in one previous year, its overall surplus tax collection was \$16.5 million, and it could reach \$6.4 million in 2011.

Regarding crimes against journalists, attackers of journalists generally get away with mild—if any—punishment. Some verdicts do not meet the minimum terms proscribed by law for the crimes. Another serious problem is that verdicts for attacks on journalists focus on the people who committed the violent acts—never the parties that ordered the attacks. Svetlana Lukić, a journalist with Peščanik, said that the approach of the courts and the political elite virtually invites more attacks on journalists. Kremenjak added, "Courts often hand down verdicts with unprofessional, unsupported explanations, reached under political pressure." However, 2011 saw an exception to this rule: In one case, the High Court of Serbia increased the penalty for two perpetrators that attacked a journalist on a Belgrade bus.

Crimes against media include physical attacks and threats, made sometimes by officials and sometimes by the targets of journalist investigations. For example, as NUNS reported on

its Media Center Belgrade website, Nedzat Beljliji, owner of local broadcasting station Spektri, was physically attacked in Bujanovac. NUNS reported that Agim Zeka Isljami, the chief of the office of the Party for Democratic Action (PDD) and a coordinator of the local Human Rights Committee, was responsible for the crime. UNS and NUNS both denounced the attack and demanded that the perpetrators be punished. The police opened an investigation, but at the time that the MSI panel convened, it was not clear whether the authorities had made any serious progress.² In another instance from May 2011, on the same day that *Vranjske Novine* won an investigative journalism award from NUNS and the Embassy of the United States, the weekly's editorial office was broken into for the fourth time. Seven laptop computers and two cameras were stolen.³

Advocacy groups, such as NUNS and UNS, speak out when crimes against journalists occur. For example, UNS denounced sharply a physical attack on Gojko Vukadin, editor-in-chief of RTV Kovacica, and Danijel Hajko, the station's camera operator. Zoran Savanov, an official of the Serbian Progressive Party, carried out the attack and subjected them to nationalistic insults as well. In response to the attacks, NUNS and the Independent Journalists' Association of Vojvodina (NDNV) called for an immediate police investigation and proclaimed to the Ministry of Internal Affairs and all state bodies that attacks against journalists have become commonplace, after the government sent the message to the public that it is acceptable to beat or insult journalists with impunity or with minimal penalties.⁴

Journalists outside Belgrade are especially vulnerable to threats by political, institutional, criminal, and militant groups. Both Mileva Malešić, editor of a local NGO television station in Prokuplje, and Ivica Smit, owner of the local radio station in Srbobran, agreed that at the local level, other media show negligible solidarity. That is contrary to common practice in Belgrade, where most major media outlets respond to attacks on colleagues from other outlets. Smit shared that, "In Srbobran, we have an example of local blog that is permanently publishing serious threats against a local newspaper, but nobody reacts."

Again this year, panelists criticized the privileged treatment of state-owned media, but also pointed out that public

services are expected to function under an impossible system. According to several panelists, the system to finance public activities is inadequate and not compatible with independence. Independent Association of Journalists of Serbia (NUNS) President Vukašin Obradović said, "It is simply unbelievable that the state does not provide funds to ensure public service activities and their independence. It is probable that the existing 'system' of uncertainty is maintained to keep state domination over public services."

During 2011, only 37 percent of television owners in the country paid subscription fees. The shortfall has a direct effect on programming, as Susa pointed out. "The financial obligations of public services to maintain its large surplus of employees are so huge that minimum amounts are left to produce programs," she said. Under this system, educational and children's programs are very rare, scientific programs are nonexistent, and the percentage of independent production is well under the obligatory 10 percent minimum, Susa added. Isakov emphasized that RTV's situation is even worse, as it is the only public service in Europe without its own building. It receives only a small percentage of subscription fees that RTS collects. In that way, contact with viewers is lost, and it is almost impossible for RTV to plan financially. Like RTS, RTV spends almost all of its funds on salaries, leaving only scant funds for programming.

Although the existing system of public services financing is far from satisfactory, the state announced the founding of six additional regional public services in the media strategy adopted this year. Meanwhile, to cope with their strained finances, public services are asking for more state assistance, damaging the media market further. In 2011, RTS asked the state to write off its debts, but journalist associations protested vigorously.

Public services have three sources of income: subscriptions, state budget funds, and commercial advertising. Their revenue streams leave private television and radio services, which are dependent solely on commercial activity, at a competitive disadvantage. Kremenjak said clearly, "State subsidies should be given to public media services on a project basis, for program production, and not to finance surplus employees." Isakov noted that the association of South East Europe public services presents a number of different systems to finance public services, and shared his view that in Serbia, the state should strengthen the subscription system instead of giving subsidies. Panelists were unanimous that public media are overflowing with employees, that production teams are old-fashioned and too expensive, and any layoffs in the future should be followed up with efforts to modernize and educate remaining staff.

²"Media News Bulletin," Media Center Belgrade. Citing material from NUNS, UNS, and Pravda, May 16, 2011. Available at: <http://www.mc.rs/media-environment.2479.html> (Accessed February 6, 2012).

³"Media News Bulletin," Media Center Belgrade. Citing material from B92, NDNV, Politika, and UNS, May 5-6, 2011. Available at: <http://www.mc.rs/media-environment.2479.html> (Accessed February 6, 2012).

⁴"Journalists were attacked at the public event 'Gulasijada.'" ANEM website, May 23, 2011. Available at: <http://www.anem.rs/en/medijskaScena/uFokusu/story/12151/Journalist+were+attacked+at+the+public+event+%22Gulasijada%22+.html> (Accessed February 6, 2012.)

Vojislav Žanetić, CEO of Mosaic marketing company, had a more sympathetic view of media workers. “The economic crisis and shortage of advertising funds has had a strong impact on all media, including the public services.” When all of the media’s economic, social, and political conditions are taken into account, he said, the editors of Serbian media are heroes of independent editorial policy. Isakov, however, criticized the explicit editorial influence of minority councils, which are able to directly propose editor appointments under the Law on Minority Councils—contradicting the principle of media freedom.

The panelists reported no changes in the treatment of libel. As in previous years, nobody was jailed for libel in 2011—journalists again faced much bigger problems with civil, rather than criminal, libel litigation. Panelists said that 90 percent of the year’s cases were civil litigations for indemnity, and only 10 percent were registered as criminal litigations. In one 2011 libel case in the First Primary Court in Belgrade, *Danas* correspondent Aleksandar Ivanišević was convicted of libel and ordered to either pay RSD 60,000 (\$735) or spend two months in prison for publishing a news about a citizen of Novi Sad wounded in a shoot-out between drug dealers.⁵ During the year, the number of civil litigation cases escalated, as in the case of Internet portal e-novine—which some panelists said is known as a center of uncompromising social and political criticism.

The indicator measuring access to public information deteriorated compared to previous years. After the reconstruction of the government, ministers were barred from giving media statements without prior approval from the government. At the same time, some ministries limited journalists’ access to unfavorable information, leaning on the government ban to justify their actions. Often, the government refused to release politically important information.

Information from state institutions is not always available to all media equally. The panelists underscored several cases of discrimination by municipal authorities against journalists. On the other hand, again this year the Commissioner for Information of Public Importance and Personal Data Protection, highly praised for devotedly helping journalists to acquire hidden information, provided a spot of brightness. He was elected to a new seven-year mandate, thanks to strong public support by media, individual journalists, civil society, and some judicial associations.

⁵ “Media News Bulletin.” Media Center Belgrade, citing material from *Danas* and NUNS, November 2, 2011. Available at: <http://www.mc.rs/media-environment.2778.html> (Accessed February 6, 2012.)

The commissioner received more requests during November than in the previous 10 months combined, as institutions tend to close up when an election approaches. Hiding information thwarts investigative journalism, and as in many other instances, local media suffer disproportionately. Blagojević remarked, “Often, police officials from Niš refuse to inform journalists on current events. The police PR officer is at the disposal of a select few journalists. Almost all official authorities insist on written requests, then procrastinate.” Smit described similar experiences in his municipality. The officials in Srbobran do not even give answers to the commissioner, and the municipality president pays penalties regularly for failing to comply with the commissioner’s orders to disclose requested information, he said. Malešić said that in his area, bureaucratic procedures are an impediment. “None of the officials will give the information before it is approved at a higher level. The police drafted an announcement about a criminal case in my town, Prijepolje, which had to travel to Belgrade for approval before it was forwarded to media. That is how media in Belgrade had the information on the seizure of drugs on the Prijepolje border crossing before the media in Prijepolje.”

As for journalists’ access to foreign and domestic news sources, the panelists reported that they experience no restrictions in access to or use of any news sources, including those on the Internet. However, NUNS did report that the rightist organization NSP “Nasi” demanded that Radio Free Europe (RSE) remove from its web page the “incorrect map of Serbia shown without Kosovo and Metohija” and called on its supporters and citizens to ask the radio station to remove the map, although the map in fact denotes the area of coverage of RSE. Responding to the organization’s statement, NUNS said that NSP’s “...public move was aimed not only against RSE, but against the freedom of the media as well.”⁶

Entry into the journalist profession is not subject to limitations, panelists said.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Serbia Objective Score: 1.72

According to the panelists, professional standards in Serbian journalism suffered from the same challenges during the year as in past years. The complex influence of the economic crisis and its chaotic impact on the media market, low salaries,

⁶ “Media News Bulletin,” Media Center Belgrade. Citing material from *Blic*, NUNS, NDNV on October 28, 2011; and from *Beta*, *Pravda*, *Danas*, and *Dnevnik* on October 10, 2011.) Available at: <http://www.mc.rs/media-environment.2778.html> (Accessed February 6, 2012.)

Smit provided other examples. "Self-censorship in Vojvodina increased, in reaction to the Hungarian National Council policy that ended in the replacement of several editors and directors for purely political reasons. Such attitudes promote self-censorship, especially with older editors and journalists."

worsening ethical standards, and heightened self-censorship stifled any chance for improvement in score. By far, indicator 4 presented the most serious drop—reflecting the panelists' disappointment with the missing media coverage of the country's serious political, economic, and social problems. All indicators scored close to the objective score: none deviated by more than a third of a point.

Regarding professional standards in journalism, Lukić commented, "Journalists often base a story on a single source, miss chances to conduct background research, and produce confusing content." Furthermore, in broadcast interviews, the apparent lack of knowledge and preparation by journalists conducting interviews sometimes reduces guests to sessions rife with verbal conflict and exhibitionism. As Lukić described, "...journalists are not aware of the normal standards in democratic societies, and accept attitudes that collide directly with elementary democratic norms. The so-called popular and

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).

sensational approach to serious themes, like family violence, discrimination, criminal liability...is not so rare."

As an example of the lingering unprofessional practices in some media, panelists pointed to the discussions on rights for the lesbian/gay/bisexual/transgender population. At one outlet, for instance, journalists brought into the studio and presented as legitimate interviewees people who publicly threatened or openly questioned elementary human rights. Panelists did find, however, that reporting on gay pride this year was more politically moderate than the year before.

Despite the media's lingering difficulties with professionalism, Susa commented that one important battle has been won: it is becoming harder for information to be covered up or suppressed by the media. There are also some outlets that conduct unbiased interviews, and Serbia has a fair number of high-quality journalists, she noted.

Smajlović and Obradović also pointed out the start of the Press Council of Serbia, a self-regulatory body established to receive public complaints about the media. They praised this as an important, strong development and a significant improvement compared to last year. According to the NUNS website, at the time that the MSI panel convened, the Complaints Committee of the press council had adopted its first two decisions. The committee decided that the article entitled "Doctor Tortures Wife and Her Lover," published in *Press* on September 9, 2011, violated the provisions of the Journalistic Code of Conduct of Serbia related to protection of privacy of citizens. The committee ordered the newspaper to publish the decision. However, the committee rejected a complaint submitted by the former minister of health, Tomica Milosavljević, in relation to the article "Government Protects Former Minister" published by *NIN*. The decisions and their explanations are available on the website www.savetzastampu.rs.

There are other checks in place to monitor media. On its website, NUNS introduced the so-called "black box," which registers ethical code violations in Serbian media. Currently, the most common offense is invasion of privacy, especially among tabloids. Often journalists violate the code unintentionally, out of ignorance. Susa pointed out that RBA monitors and evaluates program content as well as regulations on advertising time limits. The media sector has individual cases of stations that do not stick to their program obligations. Most famously, radio Fokus completely adapted its schedule to suit the interests of one political party, in a manner prohibited by law.

A UNS poll showed that 40 percent of its members think that journalists practice self-censorship. Panelists agreed that journalists and editors are becoming much more

inclined toward self-censorship for a variety of reasons. The approaching elections, the deterioration of situation in North Kosovo, and the unclear EU perspective on Serbia's candidacy all contribute to self-censorship. Journalists also fear losing their jobs and fear for the survival of their media outlets. As Smajlović described, "Sharp and piercing journalism has become the exception to the rule. The best example is the case of TV Prva editor Branka Nevistić, who was recently expelled from TV Prva for publicly resisting censorship and pressure."

Smit provided other examples. "Self-censorship in Vojvodina increased, in reaction to the Hungarian National Council policy that ended in the replacement of several editors and directors for purely political reasons. Such attitudes promote self-censorship, especially with older editors and journalists. The case of my radio clearly shows the council's position. We are the only radio station that increased programming in Hungarian language, but we did not receive a penny from the Hungarian Council because we did not want to feel obligated to give them a privileged position in news reports. The Hungarian National Council believes that the law gives it the right to behave in such a manner." He concluded that the New Hungarian Council media strategy will only strengthen self-censorship.

Several panelists agreed that to avoid self-censorship, journalists in Serbia need to have heroic qualities, given all the pressure they must withstand from economic, political, and business powers. Obradović added, "The economic situation is an important factor in self-censorship. Journalists are aware that if they lose their job, they'll have to find a new one at a time when all media are in crisis. In 2011, only Nevistić left her television station and publicly accused owners and editors for political pressure." Panelists expressed the belief that after Nevjstić aired a professional and incisive interview with the communication ministry, she was under surveillance for a long time.

In comparison to the repressive Milosevic era, nearly all events are covered in the media, although the quality of interpretation, editorial approach, and presentation are still questionable. Panelists referred to a number of disappointing cases related to coverage of key events in 2011. According to Lukić, "The key problem in media editing is the impossibility of distinguishing substantial from irrelevant material. Most journalists follow whatever thread politicians and newsmakers spin, while a number of serious themes of social importance fall off their radars. For example, autism is a huge problem that the media neglect. Very often, family violence is reported with a tone of yellow journalism, even in serious media. Formally, there are no forbidden themes, but most media focus on the trivial. Thus, we are confronted with false

media freedom. The incompetence of journalists just feeds the problem." As an example, Isakov pointed to a case of family violence in Ledinci, in which a police officer and his family died. Over the next several days, media reports focused on the interior minister and the officer, without a word about the family.

Most of the panelists assigned the lowest possible scores to the indicator measuring the adequacy of journalist salaries, and the link between salaries and media corruption. "Journalists wages are scandalously low, including in state-owned media, with the exception of a few editors and journalists," Susa said. "Therefore, journalists who leave the media and find a job in other industry rarely return."

Regarding the balance of entertainment and news, most panelists had the opinion that the majority of Serbian media outlets air more than enough news. At RTS, 70 percent of programs are informative. The phenomenon of mixing unimportant stories in daily news, however, is present, and very often stereotypes seep into information programs. According to Žanetić, "In this country, informational programming is in fact entertainment programming."

Isakov detailed the severity of the problems surrounding the technical state of equipment and facilities. "Digitalization is well behind schedule, distribution is weak, and the potential of the cable system has not been exploited enough. IPTV penetration is slow. For almost two years, practically no media bought production equipment, except small cameras and microphones for reality shows. This fact will negatively impact media content in the next few years. Today, only every tenth household is digitalized. Only 51 percent of households have access to multi-channel programs, while 49 percent still use antenna sets and can only access up to 7 to 8 programs."

Qualitative niche reporting and investigative journalism are on retreat in Serbia. The sector has a serious lack of educated journalists to cover subjects requiring qualified knowledge (such as economics, justice, or ecology). Under such circumstances, the minimal conditions for investigative journalism do not exist. The shortfall also explains why most media ignored the Anti-Corruption Council Report on Pressure and Control over the Media, which described cases of political connections between certain media and political and financial oligarchs.

Panelists said that overall, the lack of adequate education, combined with the dearth of funds and editorial vision, restricts development of high professional journalism. Positive exceptions that panelists singled out over 2011 include TV B92 and the independent team-edited program "Insider."

OBJECTIVE 3: PLURALITY OF NEWS

Serbia Objective Score: 1.93

Scores for Objective 3 dropped sharply to 1.93, from last year's 2.27. To explain the drop, panelists pointed to the key obstacles that prevent accessing multiple news sources: the economic strain on citizens that inhibits their media purchasing power, and the escalating trend of political institutions denying information to the media. The news is often similar or identical across different media outlets, while original news production is declining—which contributed also to the panelists' gloomy outlook on this objective. Obviously fatigued by their struggles to obtain accurate and varied news sources, panelists gave lower grades to nearly all of the Objective 3 indicators. Indicator 2, however, managed to score more than half a point higher than the objective score; all others scored very close to it.

As noted earlier, Serbia has an unsustainable excess of media plurality for its population, yet a diversity of viewpoints does not accompany this plurality. Smajlović commented, "I cannot say that different political opinions are presented in media. On the pressing problem of Kosovo, the same three experts always appear on all national television programs. The state news agency disburses comments instead of news. From the media, we can only find out what the ruling elite wants us to think." Žanetić commented, "While political power becomes more concentrated, news plurality is thinning. Though the

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.

number of political parties is increasing, their political profiles are often very similar or the same. The difference between quality and puff news is narrowing."

Additionally, news programs across the media formats are similar, due to a lack of funds and the related shortage of skilled personnel and technical capacities. Most media are forced to rely on a small number of news sources—typically from local news agencies.

As in previous years, panelists concluded that news sources are generally affordable and citizen access to media is satisfactory, without state restrictions. The usage of blogs and social networks as sources of information spread during the year. Journalists' use of private blogs is rising clearly, as well. Recently, more and more media consult information on Twitter and Facebook as hints for fresh news sources.

Regarding the independence of public media, Blagojević underscored the dominance of politicians in the media, and how that has damaged media plurality and independence. "Due to the crisis, national media rely on local news agencies, and do not engage their own correspondents anymore. They also use Infobiro's gratis service, financed by the government, and characterized by a public relations tone. For example, when a new factory opened, out of two minutes of a spot produced by Infobiro, the politician Dinkić appeared in all but six seconds of footage. Nothing about the factory, new jobs created, or the economic importance of the factory. Such material is dangled free of charge to poor media outlets, and ends up compromising media plurality. The improvements offered by Internet media are insufficient." Furthermore, the panelists said that the case of Infobiro is not unique. A number of other media outlets have contracts with ministries to distribute paid news that promotes ministers or politicians.

The state-owned media's failure to act in the public interest was revealed best during the North Kosovo crisis in 2011, when it was not possible to conclude what was actually happening there from the news on state-owned television and radio. Obviously, panelists said, state-owned media refuse to organize serious programs on the most pressing problems of the country. Similarly, critical local problems rarely make the agendas of state/municipality owned media. Lukić said, "It is impossible to offer more qualitative journalism, as it is extremely difficult to get elementary data about the financing or functioning of state institutions and state-owned companies. In practice, that means that journalists are prevented from investigating the biggest and most delicate themes."

The state investment in Tanjug agency and the expansion of the agency's activities on the market revealed the double standard that endangers Serbia's private agencies, Beta and

Fonet. Their only source of income is the market, where the dip in buying power diminished their competitive position. More and more media cannot pay for agency services anymore. Obradović expressed the belief that Tanjug offers services using dampened prices offset by state budget funding, misusing its privileged position on the market. Cases of media units canceling subscriptions to Beta and Fonet services and buying cheaper Tanjug service were registered in Kragujevac and Niš.

As for broadcast media's ability to produce original programming, Obradović commented, "In a time of economic crisis, it is unsurprising that media are reducing their own production and taking over cheap content." However, the structure of each media program is defined by its RBA license, as Susa explained. "Licenses are given on the basis of intended programming submitted to RBA. In the year 2011, RBA started with programmatic control of six national coverage television stations. For example, TV Avala is registered as a business television channel, but in practice it is obviously violating the regulation," she said. Malešić pointed out that her NGO television station in Prijepolje produces a program that covers local news every day, while another local television station, TV Enigma, is on the air without a single journalist or even a camera.

Blagojević summarized the situation for local broadcasters: "Due to the economic crisis, the number of journalists in local media is declining, and their ability to produce their own programs is diminishing, while national level news and news stolen from the Internet fills the void. Local media dependent on local budget financing often fail to inform public on sensitive local issues."

Media ownership is fairly transparent in Serbia, but there are cases of hidden owners. A number of important outlets operate with no known ownership structure (such as the daily *Vecernje Novosti*, *Daily Press*, and few influential television and radio stations). In addition, the state still owns and controls several influential Serbian media.

In the country's saturated market, no monopolies exist in the form of media ownership concentration, but according to the panelists, nobody talks about other forms of market monopolies. Hidden ownership is a consequence of poorly defined legal provisions, which prohibit foreigners from owning more than 49 percent of a single media outlet, panelists said.

Citing their strong concerns surrounding the trending of minority media, panelists gave lower ratings to the related indicator this year. "The quality of most information

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programs in minority media is poor," Smit said. "Furthermore, even such poor-quality content is never broadcast because of program censorship. My fear is that everything that had been achieved in minority stations and newspapers will collapse."

Some panelists said that national minority media have become instruments of the National Minority councils that dominate minority political parties. One council explained the demise of *Magyar So* editor-in-chief Chaba Pressburger with the following platitude: "*Magyar So* did not write enough about the activity of the political party Alliance of Vojvodina Hungarians and its president." Isakov further explained the issues with the media outlets of Serbia's Hungarian population. "The Hungarian minority media proposed a new strategy, consisting of a network and coordinators for Hungarian media with one central radio and one television and a joint information center. This will mean that a central unit will produce programs that the television and radio will broadcast. The practice of the National Council of Vojvodina Hungarians clearly shows that things are not moving in the right direction, and that such practice could lead to the ghettoization of Hungarian minority. Minority media plurality, present over the last 20 years, seems to be coming to an end due to badly formulated laws. It is highly possible that other minority politicians will follow the Hungarian example."

All six national coverage television stations originate from Belgrade, and most television stations with regional licenses are effectively only local stations. Belgrade media only provide local news when natural disasters or similar events occur. As a result, ignorance of affairs between the capital city and the rest of Serbia is spreading.

OBJECTIVE 4: BUSINESS MANAGEMENT

Serbia Objective Score: 1.71

The media's economic situation preoccupied the panelists during the MSI session, with panelists noting its impact on almost every indicator. Participants are keenly aware that the media—even those reliant on the state budget—face several key tests to its survival. Therefore, Objective 4 did not make up any ground already lost last year, when the economic crisis was already being felt sharply. All the indicators in this objective remained static, and as with last year only indicator 7 (audience ratings and circulation figures) exceeded the objective score by more than half a point. All other indicators scored close to the objective.

Several media houses in Serbia function as well-organized companies, but the vast majority cannot be described as well managed. Due to totally unpredictable economic circumstances, few media are using business plans as a managerial remedy. This year, the very bad situation deteriorated further, Žanetić said. "We witnessed a revolutionary change on the market, shifting our approach to survival mode. The amount of advertising shrank, and budgets are diminishing. Clearly the crisis is escalating." Panelists noticed that fewer and fewer media can be described as sustainable. The competition is so strong, however, that media outlets are tightening their belts to maximize efficiency.

Panelists concluded that media are not in a position to operate as independent, efficient, and self-sustaining

enterprises. Isakov complained that there is seemingly no viable system that can keep public service self-reliant. "RTV financing is complicated and ineffective, and no real and sufficient sources for sustainable financing can be traced or expected. The state should provide funds at least to ensure basic public service functioning."

Contracts between individual ministries and media to promote certain activities is a huge problem, as in practice it generates puff pieces highlighting the activities of certain ministers. A good example is the contract between the Ministry for Ecology and *Blic*. Essentially, it has turned into a personal and party campaign site of the minister, panelists said.

Theoretically, any media company in Serbia can earn money from multiple resources, but in 2011 all sources shrank drastically, producing serious consequences for media sustainability and for the independence of editorial policy. The worst effect is inequality in the advertising market, the panelists said. Until recently, Serbia's advertising market showed impressive growth. But the economic crisis dampened the trend, and 2011 is expected to be worst year in almost a decade. Darko Bročić from AGB Nielsen pointed out that the Serbian advertising market in 2010 was €175 million—unchanged from 2007's figures. Classical mass media advertising will certainly diminish, according to the panelists.

Agencies place advertisements only in the most successful media, mainly those with national coverage, largely leaving local media behind. As noted earlier, the public service in Serbia has a right to compete equally on the market for advertisements, in spite of its two other funding sources (state subsidies and subscription fees) that are not available to other media. Furthermore, the ruling party controls the largest advertising agencies, and panelists expressed the belief that advertising is used as a political tool. "The specific Serbian problem of media market functioning is the fact that the biggest advertising agencies are under direct or indirect control of ruling political parties, i.e. high positioned politicians. That was clearly shown by the 2011 Anti-Corruption Council presentation of the Report on Pressure and Control over the Media," Lukić said.

As noted last year, advertising revenue is in line with standards percentage-wise, but panelists said that the prices are too low. The striking case is RTS, which in 2011 pulled revenue equally from subscription and advertising, though normally the advertising-to-subscription ratio would be 1 to 4. This is a consequence of the fact that only 30 percent of households pay subscription fees and the state is either unwilling or unable to ensure payment collection.

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.

Regarding government subsidies, Susa said, “State subsidies are becoming a source of corruption and pressure on media, as shown by the Anti-Corruption Council’s Report on Pressure and Control over the Media.” Nevertheless, 2011 saw positive changes to the subsidy system. Public awareness of state subsidies to the media increased, and thanks to the pressure of journalists’ associations during long discussions on the new media strategy, the approach to subsidies shifted. Ultimately, the government agreed that starting in the beginning of 2012, state subsidies for the media would be disbursed on a project basis. Although that principle was included in the text of the new media strategy, the state had already given it up before the end of 2011, when the proposal for the new state budget in 2012 included traditional subsidies for state-owned media, completely omitting the agreement.

Market research is a traditional industry standard in Serbia. This year it even improved, as two strong companies (ABC gemiusAudience™ and Nielsen Serbia) started to measure Internet audiences. The advertising market in Serbia is well developed, with foreign and domestic agencies using data on media viewership/listenership/readership published by professional research agencies. Some panelists, however, gave lower marks to this indicator, saying that research results are furnished.

Serious measurement of Internet media use just launched with two newcomers, and advertising agencies consider broadcast ratings reliable. Panelists noted that ABC Serbia, a company measuring press circulation, has joined other well-established research companies in the Serbian market.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Serbia Objective Score: 2.17

The role of several media associations in the struggle for a new media strategy proved to be the major development under Objective 5 in 2011. Five media institutions (NUNS, UNS, NDVD, Lokal Press, and the Association of Independent Electronic Media [ANEM]) labored to secure a decent new media strategy. Though negotiators achieved consensus on the text of media strategy, and the government announced its intent to fast-track implementation of the strategy, it soon became apparent the government’s intentions were not sincere. Objective 5 dipped this year, from 2.40 to 2.17. All indicators scored within a half-point of the objective score.

Serbia has three trade associations of media owners: ASMEI, ANEM, and Lokal Press, but their memberships are limited, covering only a small percentage of the huge number of media owners. All three associations provide services to their

However, the panelists noted that broadcast transmitters are now owned by the new state company, Transmutations Technics, which some panelists said behaves like a monopoly.

members and successfully represent their interests. Serious communication between journalism unions and media owners in Serbia is not on the agenda yet.

Five professional media associations teamed up in 2011 to contribute to a better media strategy. Also, in several instances, these five associations reacted jointly on problems affecting the media. In general, they enjoyed greater cooperation than in previous years, and all five associations collaborate successfully with international media and journalist associations. Individually, their activities concentrate on defending media and journalist rights and on the defense of the freedom of expression. According to several panelists, membership in these associations is growing. They also act as a substitute for a journalists’ union in essence, while journalism syndicates in Serbia have not yet gained popularity.

In principle, most NGOs support press freedom and independent media, but in some cases they try to influence editorial policy. Malešić, speaking as the CEO of an NGO-supported local television station, said, “We are

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.

CSO media, and we are actively promoting and recording NGO activities. But some NGOs are not satisfied with our professional reporting, and think that we should report favorably on their work instead of offering true and balanced reporting." Despite cases like this, scores for this indicator went up because most media NGOs, along with civil society institutions, offered very strong support to re-elect the Commissioner for Information. In the Serbian government, the commissioner is sometimes considered the last defense for freedoms and is revered highly by pro-democracy advocates.

During 2011, 14 academic institutions provided some level of education for journalists. However, in spite of journalism education improving in recent years, many journalists in Serbia still have not had any schooling or taken specialized courses.

Panelists noted that the technical equipment in faculty and media schools has improved, but still, young journalists coming from journalism courses need further practical training. Despite the clear need, the number of short-term training courses shrinks every year. As many foreign media donors have withdrawn from Serbia, a number of short-term educational courses have dropped out of sight, with negative consequences for the profession. The specialist courses most needed deal with themes such as the environment, the economy, health, finance, the EU association process, and energy. High on the agenda are courses on new media.

Sources of newsprint and printing facilities are private, apolitical, and unrestricted, and no legal limitations exist.

As for distribution, though, the situation has deteriorated further, as some cable operators have started to charge media outlets for inclusion in cable lineups. They also introduced the practice of expelling any media outlet that fails to pay. Žanetić traced this problem to limited cable capacity, which prompts cable operators to instead embrace foreign media that are willing and able to pay, at the expense of domestic enterprises that either enjoyed free access previously or could not pay their bills.

Online media outlets and bloggers are free to choose software and platform options. However, the panelists noted that broadcast transmitters are now owned by the new state company, Transmutations Technics, which some panelists said behaves like a monopoly. As Isakov explained, "Communication infrastructure is a precondition for a qualitative media system. Finally, the government put media and communications under one ministry, so the investment development could be harmonized with media development. Unfortunately, the money surplus collected from media by RATEL this year will be directed to the state budget instead of toward digitalization of the media sector, or to strengthen distribution channels."

List of Panel Participants

Ljiljana Smajlović, president, Journalist Association of Serbia, Belgrade

Vukašin Obradović, president, Independent Association of Journalists of Serbia, Belgrade

Vojislav Žanetić, CEO, Mosaic marketing company, Belgrade

Darko Bročić, CEO, AGB Nielsen, Belgrade

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Siniša Isakov, director, RTV Vojvodina, Novi Sad

Predrag Blagojević, CEO, owner, Južne vesti, Niš

Gordana Susa, board member, Republic Broadcasting Agency, Belgrade

Ivica Smit, director, Radio Srbobran, Srbobran

Mileva Malešić, director, TV Forum, Prijepolje

Svetlana Lukić, journalist, *Peščanik*, Požarevac

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