

**MEDIA**

**SUSTAINABILITY**

**INDEX**

**2005**



**IREX**

SIMILAR PROBLEMS AND CHALLENGES FACE THE MEDIA SECTOR: 2005 WITNESSED THE STOPPAGE OF BROADCAST PRIVATIZATION, THE REASSERTION OF INTERFERENCE BY THE STATE AND POLITICAL PARTIES IN MEDIA MANAGEMENT, AND INCREASED PERSECUTION OF JOURNALISTS AND MEDIA ENTITIES BY LOCAL AND STATE POLITICIANS.



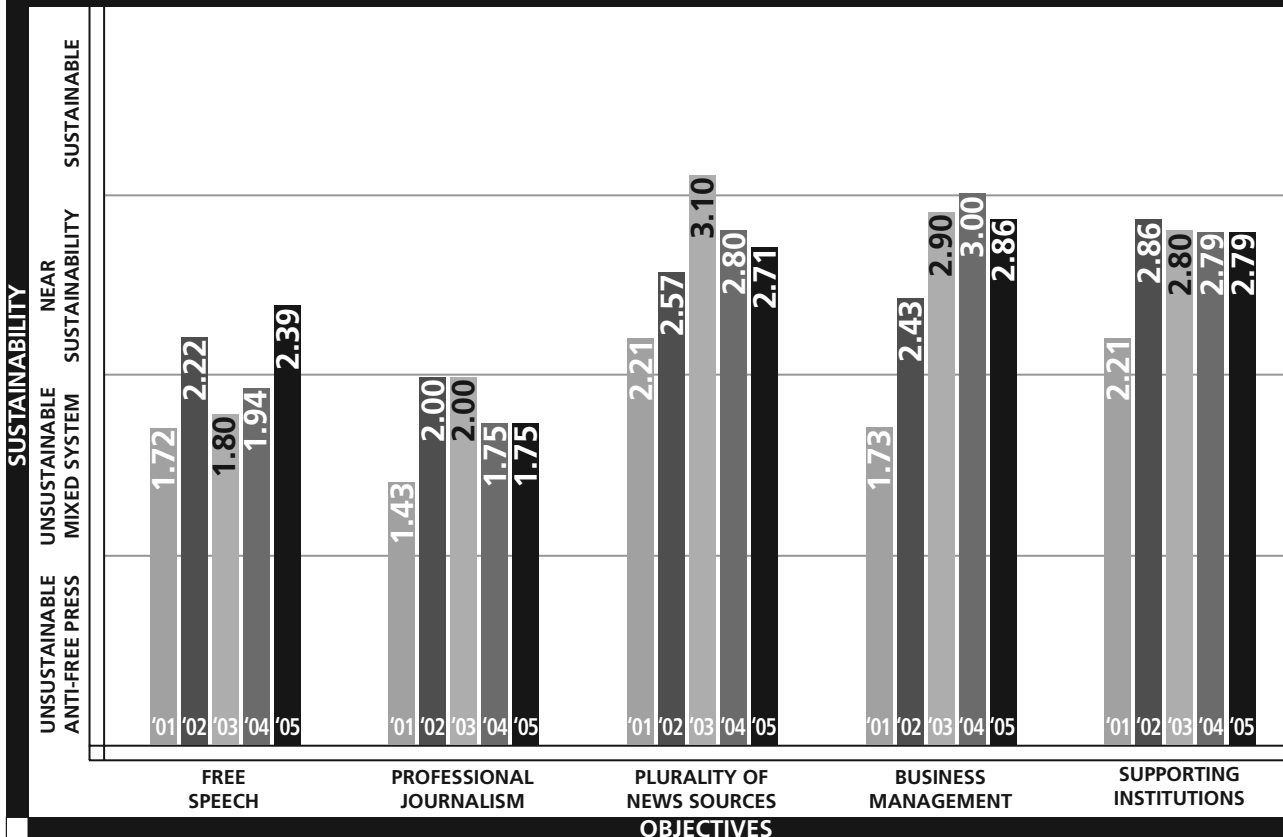
**F**ive years after the departure of the Milosevic regime, Serbia continues to cope with the transition to democratic and market systems. The country struggles to pass through difficult political and economic crises as it tries to emerge

from the Milosevic years and more than a decade of international isolation and stalled reforms. In addition to the normal transition issues, Serbia must face serious issues affecting the very nature of the state, such as the future of its federation with Montenegro and resolution of the status of Kosovo. In addition, Serbia remains under pressure from the international community, which is seeking full cooperation with the International Criminal Tribunal for the Former Yugoslavia (ICTY). At the same time, radical forces in Serbia are using the ICTY as a rallying cry against democratic forces. Against this backdrop, serious economic problems, including severe and widespread poverty, threaten Serbia's ability to develop into a modern European state.

The key transition challenges therefore still remain from previous years: improving democratic mechanisms; reducing bureaucracy and combating corruption; boosting private-sector development and improving the investment climate; and restructuring and privatizing major public-sector companies.

Similar problems and challenges face the media sector: 2005 witnessed the stoppage of broadcast privatization, the reassertion of interference by the state and political parties in media management, and increased persecution of journalists and media entities by local and state politicians. In 2004, one of the most serious, long-lasting problems was the inefficiency of the Broadcast Council and the government's failure to redistribute frequencies in a fair and impartial manner. This occurred despite the earlier introduction of laws aimed at providing guidelines for the issuing of frequencies. The stalemate continues, and licensing has not happened. The tabloidization of the media, considered by the Media Sustainability Index (MSI) panel in 2004 to be the most distressing phenomenon of that year, may be even worse in 2005, with growing use of intolerant and racially abusive content. Tabloids are heavily engaged not only in sensationalist,

## 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.

unfair, and unbalanced reporting, but also in actively and knowingly fabricating lurid political scandals, character assassinations, and witch hunts against selected individuals.

These negative developments were fortunately accompanied by improvements in other sectors of the media. The Freedom of Information Act began to be implemented, access to foreign information sources is now absolutely free, and the Broadcast Council finally started to work, albeit with extremely modest results. Additionally, the privatization of state-owned print media did move ahead. Market leaders in professional news and public-affairs programming continue to play important roles in the market. National media such as B92, Beta and FoNet, Vreme, Danas, and Nin, and many local and regional media serve not only as serious sources of news and information but as examples of professional journalism for the media market.

**OBJECTIVE 1: FREE SPEECH**

**Serbia Objective Score: 2.39 / 4.00**

In 2005, there were improvements in free speech over the previous year as important legislation began to be implemented. These improvements included amendments to the Broadcast Law, allowing the Broadcast Council to begin operating; an access-to-public information law began implementation; improved tax treatment of media; and a regulated advertising market. At the same time, serious problems remain: Political interference continues and is increasing at the local level, libel remains in the criminal code, and licensing has still not started despite progress toward that goal.

The legal protection of free-speech rights improves slowly from year to year in the opinion of the panelists. The parliament passed amendments to the Broadcast Law and passed an Access to Public Information Law. With the amendments to the Broadcast Law, the Broadcast Council began to function. After two years of prevarication, a Law on Advertising was passed and provided clarification on advertising content regulation, bringing some measure of certainty to media. In addition, the Ministry for Culture finally published the long-awaited deadlines for privatization of electronic media in a parliamentary decree. As Goran Vladkovic, owner of OK Radio in Vranje said, "All of the laws in favor of media passed, thanks to the pressures from the Free World on the Serbian Government. The government did not want these laws but had to pass them under outside pressure."

The licensing of broadcasters remains an area where Serbia lags far behind the rest of Central and Eastern Europe. Licensing has still not progressed, and no regulations even exist for prospective licensees to follow. The only positive move this year was the Broadcast Council's recent invitation for media to apply for registration as a step toward licensing. However, the hundreds of broadcasters in Serbia continue to operate in uncertainty.

Despite the problems with licensing, market entry is not unduly restricted in other ways and the tax structure is similar for other industries. The one exception provides favorable tax treatment to print media, which pay only an 8 percent value-added tax (VAT), compared with the normal rate of 18 percent.

Unfortunately, according to the Independent Journalists Association of Serbia (NUNS), 2005 saw more attacks on journalists, including physical assaults. NUNS also believes that the number of threats made against journalists is increasing. The media community judged investigations into these assaults and threats as insufficient or nonexistent. As

**Legal and social norms protect and promote free speech and access to public information.**

**FREE-SPEECH INDICATORS:**

- > Legal/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 the offended party 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.

***“All of the laws in favor of media passed, thanks to the pressures from the Free World on the Serbian Government. The government did not want these laws but had to pass them under outside pressure,” said Goran Vladkovic.***

Suzana Jovanic of the Open Society Fund noted, “Criminal acts against journalists are not prosecuted. This is a very dangerous situation.”

State media remain in a

preferential position, as they receive money directly from the state and have the ability to receive substantial advertising income. In 2005, obligatory subscriptions for the state broadcaster were introduced, but how this financing will ultimately affect state broadcasting remains to be seen. Panelists judged that while Radio-Television Serbia (RTS) has improved, it cannot be seen as a public broadcaster, free from political interference and serving the public. At the local level, state media remain as privatization stalls and local politicians interfere in editorial control.

Libel remains in the criminal code, but jail sentences have been removed as punishment and only financial penalties may be imposed. However, the harmful practice of making journalists prove they are not guilty, instead of the presumption of innocence, stays in the legislation. The MSI panel also observed that judges are not trained sufficiently to deal with libel cases and therefore are not implementing Serbian laws in light of the country’s recent ratification of the European Convention on Human Rights. As Dragoljub Zarkovic, editor-in-chief of *Vreme*, stated, “Journalists accused of libel can expect different treatment depending on which judge tries their case. Most judges do not know the laws relating to libel. My proposal is that judges should go for additional education.”

The beginning of implementation of the law on Access to Public Information occurred in 2005. Panelists generally contend that the law represents a step in the right direction toward opening public records to the media and public. However, the law does impose an onerous requirement for notification, and the government maintains the right to censor any document requested. In practice, the law has not yet shown substantial benefits. Local media in particular have real problems getting any official information, especially if it is delicate and does not favor politicians or the parties in power in their municipalities. Svetlana Kojanovic from *Cacanski Glas* (Cacak) argues that “journalists in the local media are especially burdened

by complicated procedures to get official statements from Serbian state representatives and often are prevented from doing their job professionally.”

Entry into the journalism profession remains unrestricted by either government or professional bodies representing the journalism community. Some expressed concern that there are no professional qualifications or training needed to enter the profession, resulting in reporters who either ignore or are ignorant of basic ethical standards. As Nebojsa Spajic of the Executive Group noted, “Paradoxically we can give the highest mark to the possibility of entering the journalist profession. But this situation has its negative side because here in Serbia literally anybody can become a journalist, so our professional standards drop to the lowest levels, including reporters with low levels of literacy, whilst also having high levels of prejudice and vulgarity.”

## OBJECTIVE 2: PROFESSIONAL JOURNALISM

**Serbia Objective Score: 1.75 / 4.00**

Looking across the entire media sector, 2005 witnessed stagnation in the level of professionalism of independent media compared with 2004. In 2004, the MSI pointed to a generally low skill level across the profession, poor ethics, and self-censorship. The stagnation the panel agreed on did not represent a clear consensus on the

### 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).

level of professionalism. Some focused on the growth of tabloid journalism as a serious threat to the profession, while others felt that this threat was overrated. However, all were clear that Serbia is witnessing two divergent trends in the journalism profession. On the one hand, tabloid journalism continues its spread, and this form of unprofessional and unethical reporting weighted down the overall scores as the more professional media continued to show improvements in the practice of journalism. This core of professional media committed to ethical, balanced, and informative reporting remains influential among decision-makers and opinion-makers, while the tabloid media appeal to large segments of the general public. What this will ultimately mean for Serbian journalism remains to be seen, but the profession has begun to organize against the worst excesses of tabloid journalism, seeking to apply a system of ethics and standards.

Nebojsa Spajic indicated that “research completed in the last 12 months showed that many journalists are not aware of the most basic ethical principles, and what is worse is that that the situation has not improved over the last two years.” However, the impact of tabloid journalism should not alter the reality that the standards of journalism have been improving among the general media, due in part to training courses organized by Serbian media organizations and donors. Ethics are better understood, and professional standards are improving. The panelists believed that many journalists and editors do not possess the skills to cover the dramatic nature of events unfolding in this society or in the region. Dragoljub Zarkovic points to the lack of depth in coverage: “The problem of reporting on Kosovo, especially using an analytical approach, is nonexistent. This is a serious problem.”

There is also a danger that there will develop a race for the lowest common denominator. Svetlana Kojanovic alluded to this by indicating that “circulation, number of viewers, number of listeners, and people-meters have become the basis for calculating success in this profession.” Dragoljub Zarkovic also indicated that this remained a potential problem: “The problem is not with extreme media but the fact that the business world does not support good media. Business loves primitive media.”

Self-censorship continues to be an issue, albeit one that takes on different forms. It is widely believed that there are no political pressures on editors of national media but that pressures from business circles are growing. At the same time, editors indicate that some people try to pay to have articles written about them, while others try to pay to stop things being written about them.

Self-censorship continues at national and local levels but may be particularly acute in the local media.

This self-censorship does not affect, on face value, coverage of key events and issues. They are covered by most media. However, the quality and complexity of much of the coverage is doubtful due to self-censorship, lack of professional skills, and social pressures against certain coverage. As Marina Fratucan, the CEO of URBANS Productions in Novi Sad, notes, “We go to Kosovo when it is possible, but publishing our stories was blocked out by most media.”

At the same time, there is slow improvement in niche reporting and programming. However, investigative journalism is an area under pressure, since many journalists refuse to work on serious stories for their basic salaries and since there is not enough technical or financial capacity for serious investigative journalism.

One of the problems facing the profession and making improvements more difficult remains the low level of pay for most journalists. The average salary of journalists in Serbia has not been higher than \$300 per month for years. This opens journalists to corruption and also drives many talented people out of the profession.

While tabloid journalism is a continuing concern, it is widely accepted that the balance between entertainment and news and information programs stayed the same in 2005 as in

previous years. While in 2004 panelists believed that RTS increased entertainment at the expense of news, they believed that the balance did not change in 2005. Local media are introducing more news, a fact appreciated by the audience, but the quality of many news programs is questionable. It should also be noted that traditional political programs are undergoing somewhat of a transformation. More of these shows are borrowing their ideas and styles from the world of entertainment.

A problem that will face local media and their ability to produce quality news is the declining quality of their technical facilities and equipment. While most Belgrade-based media have modern technology in use,

***Nebojsa Spajic indicated that “research completed in the last 12 months showed that many journalists are not aware of the most basic ethical principles, and what is worse is that that the situation has not improved over the last two years.”***

local media lag far behind in this respect. Now that the process of donor withdrawal of funds for Serbia is well under way, the ability of provincial media to replace and upgrade this equipment remains problematic. This, combined with the particularly low levels of pay at the local level, makes local media the most endangered of all media in Serbia.

### OBJECTIVE 3: PLURALITY OF NEWS SOURCES

**Serbia Objective Score: 2.71 / 4.00**

The MSI panel agreed that the situation remained much the same as in 2004, if even slightly worse for some of the indicators. In purely numerical terms, Serbians enjoy access to a wide variety of news sources. Hundreds of broadcasters providing news exist in Serbia's unregulated broadcast sector. Private stations exist at local, regional, and national levels. The state broadcaster, RTS, continues to be a major news source and local municipally owned media (more than 150) compete with local private media. The print sector offers dailies, weeklies, and local and regional newspapers. There are no restrictions on foreign news sources, either broadcast or print.

However, this numerical plurality does not necessarily mean there is quality, nor does it mean unfettered access by the general population. State and municipal broadcasters face outside pressures but also are pressured to maintain the status quo and follow the majority opinion toward major events and issues. Income levels continue to limit the ability of large parts of the population to buy print media regularly. Varied offerings, including foreign media on cable and satellite remain expensive, as does Internet access due to a state monopoly on the transmission system. As Marina Fratucan noted, "Internet, cable and satellite TV, foreign publications, everything is available to everybody if they have the means to pay for it. The question really is what part of the population has the prerequisites to receive any of this varied information."

Panelists noted a general misunderstanding about the role of public-service broadcasting, both in the commentary provided by a wide range of media outlets and in society at large. It is not viewed as a potential source of independent and unbiased news and public-affairs programming, but rather as something that should follow public opinion and, among a large segment, one that should represent the state interests. This, in turn, contributes to lack of public concern over the lack of an apparent public-service ethos at RTS. Slobodan Kremenjak noted, "Instead of filling

the gaps that commercial broadcasters do not cater for, RTS has started competing with them. The output practically resembles commercial stations' program schedules much more than it resembles public-service broadcasting." Voja Zanetic of Mozaik Marketing Agency follows this point as well: "RTS does not invest in cultural and educational programs as much as they should as a public service, simply because it has not become a public-service broadcaster and also—it has nothing to invest."

Local municipal media remain an important source of news for the population and remain under municipal ownership since planned privatization has been stalled for the past two years. While many of these outlets were important sources of professional news during the Milosevic era, when opposition-controlled municipalities allowed editorial independence, there has been a growing trend, noted also in 2004, to restrict their ability to operate as public-service media. Nebojsa Bugarinovic, the president of NUNS noted that "municipal politicians often feel these outlets are their own PA system."

Serbia has two high-quality private news agencies, Beta and FoNet, and the state-controlled Tanjug continues its operations, drawing the majority of its resources

#### 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.



from the government. The agency then competes in the poor Serbian market with Beta and FoNet, whose quality is generally rated better than Tanjug's. The poor economic situation in Serbia continues to hinder the ability of the news agencies to invest and expand their operations. Zlata Kures of Beta argues, "Most of the media outlets are not able to pay what is a realistic price for news agency services. and Beta is forced to lower its prices to the level of meager day-to-day survival. This income from the market is not enough to cover its running costs." In addition, Zlata Kures argues that there is not an appreciation for news agency services since there is a "strong tradition" of these services being provided free of charge.

While the news agencies are widely used in Serbia by both print and broadcast media, most outlets providing news do produce their own programming. Panelists noted that it was not a matter of programming being produced, but the quality of that programming that reduced citizens' access to diverse sources of professional news. Svetlana Kojanovic explained, "The enormous number of media on offer in Serbia unfortunately does not mean the information presented is reliable and well balanced. Even an average recipient recognizes easily who is the owner of an outlet—be it the state or local administration, a businessman or a politician—because that outlet has no distance or critical approach toward the owner. This problem is extremely present during pre-election campaigns." Some quality news is distributed via networks or rebroadcasts (ANEM, B92), which helps improve the situation.

Panelists felt that there remained some distance to go until one can say a broad spectrum of social interests are reflected and represented in the media. Many of the panelists felt religious, social, economic, or political perspectives are not truly represented, as publications and broadcasters tend to focus on what is favored by the ruling political parties and their allies. Public media have not done a good job of meeting the needs of minorities. The key RTS slogan, "national TV," rings hollow in a country where a large percentage of the population belongs to national minorities. They seem pitifully served by their "national TV." A void has also developed in the area of educational and cultural programming that should be provided by RTS. Panelists felt that "ghetto-ization" of minority programs appears to be the solution for state broadcast schedulers, as they insist that minority-language programs exclude the majority of Serbian-only speakers. At the same time, one panelist noted that "minority-language media outlets also do not have pluralism, nor do they show plenty of tolerance for otherness. In major media, the interest for minority

issues doesn't really exist. Hate mail and other threats are still appearing in national newspapers when it comes to covering minority issues, even when this includes covering others such as ethnic or gender issues."

For private media, the issue of media ownership continues to be a concern. Media companies are registered according to the law, but the "data" submitted are not always reliable and there is no obligation to report the origin of any investment. At the same time, it is believed that there is no clear monopolization of the market. One panellist noted that "Serbia is one of the rare countries in the region where plurality of media ensured there has been no monopolization of the media market—and this is very good for Serbia's media future. In television we don't have any conglomerate prevailing, so there is a lot of diversity."

#### OBJECTIVE 4: BUSINESS MANAGEMENT

**Serbia Objective Score: 2.86 / 4.00**

The situation in business management remained essentially the same as in 2004, with some circumstances in the business environment getting tighter, making media outlets' work across Serbia even more difficult. The media industry, although under many pressures, operates reasonably efficiently

#### 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.

and professionally. Media receive revenue from a variety of sources, but the overwhelming problem is the economy, with a generally low level of financial liquidity. As Svetlana Kojanovic argued, "With the current state of the economy in this country, it is highly improbable that any media outlet is able to resemble a proper business! Private media owners usually deal in other, more profitable activities outside the media to make their real money. Disloyal competition and an oversaturated market are still here, so the majority of media is very dependent on the few financial 'Almighties,' which in turn directly limits the independence of editorial policy."

There is a concern over which outlets are most sustainable. Marina Fratucan believes they are not the most independent. "There are no truly completely independent media. Those that are nearest to this profile are, unfortunately, not profitable businesses." However, many do believe that sustainability is in sight for even the most professional news media that have relied to a large extent on donors. Dragoljub Zarkovic notes that "more than ever the pressure is to place as many ads as possible in the media, which is a healthy source of income. Much of the media is approaching a position to generate a substantial part of their income from the market."

The advertising industry in Serbia is even more developed than the media sector. Affiliates of foreign agencies operate in the country, and local agencies also compete. Many media have developed relationships with ad agencies as well as their own advertising departments, if proactive selling is not always the norm. However, the advertising industry is experiencing some disturbances, caused by the introduction of the Advertising Act at the end of 2004. This act banned advertising for cigarettes on radio and television and placed restrictions on alcohol advertising. Both were major sources of revenue for the agencies and the media, causing a change in the market. Another important new feature of the market is the fierce ratings clash between RTS and TV Pink, the top-rated commercial station. This will have an impact on advertising across the market.

As a rule, private media do not receive government subsidies, but there remain shades of doubt posed by some panelists about state institutions acting as advertisers. Charity, education, and health campaigns run by various Ministries along with the advertising produced for the National Lottery have considerable budgets, and they might be used to condition the news agendas of some media outlets, according to some panellists.

The use of professional market research and ratings is now regular and familiar in Serbia. Broadcast ratings are produced on a daily basis, thanks to the introduction of people-meters, and regular market research occurs at the national level. For print media, however, there are no reliable circulation figures produced. While sophisticated research does exist across Serbia, many media cannot afford to commission research themselves and many even cannot afford to buy results of regular surveys offered to all media.

There are an increasing number of media professionals who are well aware of the role of research and its use. Media planners and program schedulers are getting more interested in local research results and national databases. The research agencies, from their side, are trying to make their products more available and affordable. As Nebojsa Bugarinovic said, "Using the services of marketing and research agencies has become a necessity instead of a fantasy." However, the use and interpretation of research data remains problematic in some instances. Sometimes confusion results from different agencies providing competing data using different methodologies. In addition, the use of out-of-context quotations from research results adversely colors the perception of research results.

#### OBJECTIVE 5: SUPPORTING INSTITUTIONS

**Serbia Objective Score: 2.79 / 4.00**

Little change, positive or negative, was seen on average for supporting institutions. Serbia has a substantial number of media-support nongovernmental organizations (NGOs), media training institutions, and trade and professional associations of relatively long standing. However, there was little substantive change in their capacity or activities during 2005, while some human-rights and free-speech NGOs alienated major segments of the media community with their battles against live transmission of the Hague Tribunal proceedings and intense criticism of some reporting.

Trade associations for print and broadcast media exist and provide advocacy for the rights of their members and training in journalism and business management. The Association of Independent Electronic Media (ANEM) remains one of the leading associations with a high international profile, legal support for members, advocacy efforts for broadcasters' rights, and a training center for members. A leading print media association remains Local Press, which represents regional media. In particular, it helped local media prepare for the new tax system that allowed for tax rebates.

**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 private, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

The Independent Journalists Association of Serbia (NUNS) is judged to be the most professional of the two major journalists' associations, with the Journalists' Association of Serbia (UNS), the former state association, being seen as less effective and independent and less supportive of the rights of journalists. While totally reliable figures are not available, approximately one third of journalists belong to NUNS, one third to UNS, and one third to no association at all.

NUNS claims 2,300 members and regularly participates in advocacy efforts in cooperation with other associations and NGOs, offers training on an ad hoc basis, and offers legal support to journalists. It also continued to pressure authorities on investigating the murders of journalists Slavko Curuvija and Milan Pantic. However, many in the media see NUNS as relatively weak. Svetlana Kojanovic argues that "there is still no bidding for frequencies and licenses and no collective labor contracts. So it is clear that journalist associations lack a significant impact and are seen as weak organizations and the government is using this to its advantage." Human-rights groups such as the Helsinki Committee and more specific institutions such as the Media Center also offer support for the media and advocate for free-speech rights, often in cooperation with organizations such as NUNS and ANEM.

In many respects, journalism education in Serbia can be seen as progressing, but at the same time the overall average is being watered down through at least a dozen questionably licensed journalism schools. Vesna Sladojevic, deputy editor-in-chief of RTS, asks: "Has anyone recently employed a good journalist coming from any of these schools? The state is making a huge mistake by licensing private, commercial universities without any control on the content and quality."

The centerpiece of formal journalism studies, the Department of Journalism at the Faculty of Political Sciences in Belgrade University, continued to upgrade its courses in 2005. After opening a radio studio, the television studio has been equipped and is now in use. This continues to move the faculty away from theoretical studies and toward a practical approach to journalism education. Public-relations studies and newspaper photography studies have been introduced, and cooperation and exchange with international journalism degree programs has started.

Short-term training is important at present as Serbia seeks to improve its existing core of journalists. However, it was noted that only a small percentage of people are being trained when counted against the enormous number of media outlets throughout Serbia. But short-term courses and seminars are being offered by organizations such as NUNS, ANEM, the Media Center, and international donors and NGOs. However, the reliance on donor support may be creating a false market, as Suzana Jovanic notes: "The numbers are deceiving. We don't have realistic indicators of trainees' and managers' attitudes while this education is free of charge, while the donors are paying for it."

The newsprint and printing industry are still unrestricted but under major threat of monopolization, particularly in relation to distribution networks, which are owned by foreign investors and local tycoons. Internet access bears the limitations associated with the monopoly over telephone lines controlled by the state postal service. Cable television channels are not regulated legally at all, and the state, through its broadcaster RTS, still owns and operates the hardware and infrastructure for transmitters. While there were no apparent instances in the print or broadcast sector of abuse by those controlling the distribution, the potential monopolization of printing and distribution and RTS control over much of the terrestrial transmission sites and infrastructure raises concerns that these levers could in the future be used against independent media.

## **Panel Participants**

**Svetlana Kojanovic**, Director and Editor-in-Chief,  
*Cacanski Glas* (Cacak)

**Slobodan Kremenjak**, Lawyer, Law Firm of Zivkovic &  
Samardzic

**Nebojsa Bugarinovic**, President, Independent  
Journalists' Association of Serbia

**Voja Zanetic**, Marketing Specialist, MOSAIK Marketing  
Agency

**Suzana Jovanic**, Media Specialist, Open Society Fund

**Zlata Kures**, Deputy General Director, BETA News  
Agency

**Marina Fratucan**, Chief Executive Officer, Independent  
TV Production Group URBANS (Novi Sad)

**Dragoljub Zarkovic**, Director and Editor-in-Chief, *Vreme*

**Darko Brocic**, Director, AGB

**Vesna Sladojevic**, Deputy Editor-in-Chief, Radio-  
Television Serbia

**Goran Vladkovic**, Editor-in-Chief, OK Radio (Vranje)

## **Moderator**

**Nebojsa Spajic**, Senior Consultant, Executive Group

## **Observers**

**Sam Compton**, Chief of Party, IREX ProMedia

**Goran Cetinic**, Media Advisor, IREX ProMedia

**Dragen Kremer**, Media Advisor, IREX Promedia

# SERBIA AT A GLANCE

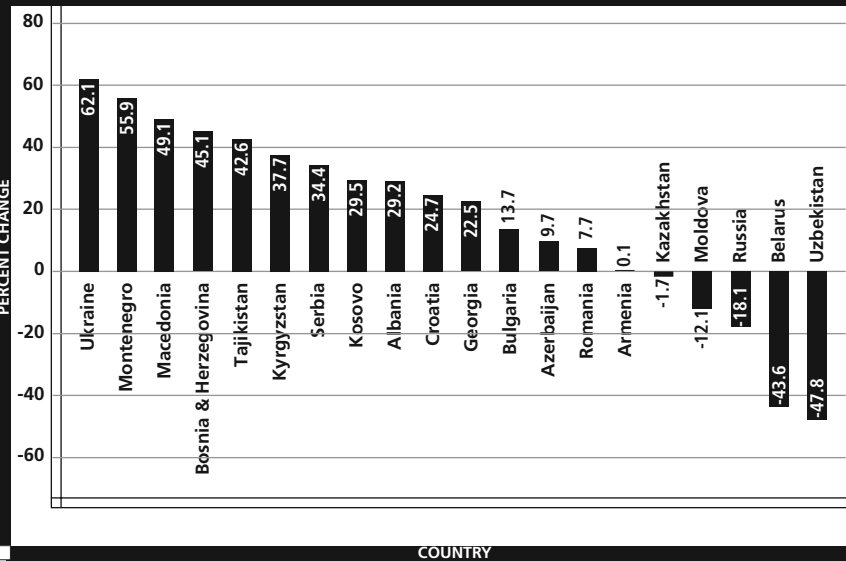
## GENERAL

- **Population:** 7,498,000 *SMMRI*
- **Capital city:** Belgrade
- **Ethnic groups (% of population):**  
Serb 82.86%, Hungarian 3.91%, Bosniak 1.82%, Roma 1.44%, Yugoslav 1.08%, other 8.89% *Federal Statistical Office*
- **Religions (% of population):**  
Orthodox 65%, Muslim 19%, Roman Catholic 4%, Protestant 1%, other 11% *CIA World Factbook*
- **Languages (% of population):**  
Serbian 88.3%, Hungarian 3.8%, Bosnian 1.8% *Federal Statistical Office, 2002*
- **GDP:** \$20.4 billion (2004 est.) *SMMRI*
- **Literacy rate (% of population):**  
96.3% (According to the last Federal Statistical Office census, there are 3.7% illiterate inhabitants older than 10 years.)
- **President or top authority:**  
President Boris Tadic
- **Next scheduled elections:** Local elections 2007

## MEDIA-SPECIFIC

- **Newspaper circulation statistics (total circulation and largest paper):**  
No accurate information available
- **Broadcast ratings (top three ranked stations):**
  - **Television:** TV RTS 1, TV PINK, TV BK
  - **Radio:** Radio Beograd 1, Radio S, Radio B-92
- **Number of print outlets, radio stations, television stations:**  
Approximately 1,500
- **Annual advertising revenue in media sector:** \$95 million (estimated real value) *AGB Nielsen*
- **Number of Internet users:** 22% of inhabitants older than 18 years
- **News agencies:** BETA, FONET, TANJUG

MSI AVERAGE SCORES—PERCENT CHANGE 2001–2005



MEDIA SUSTAINABILITY INDEX: SERBIA

