

MONTENEGRO



MEDIA SUSTAINABILITY INDEX 2018

Tracking Development
of Sustainable
Independent Media
Around the World



MONTENEGRO

AT A GLANCE

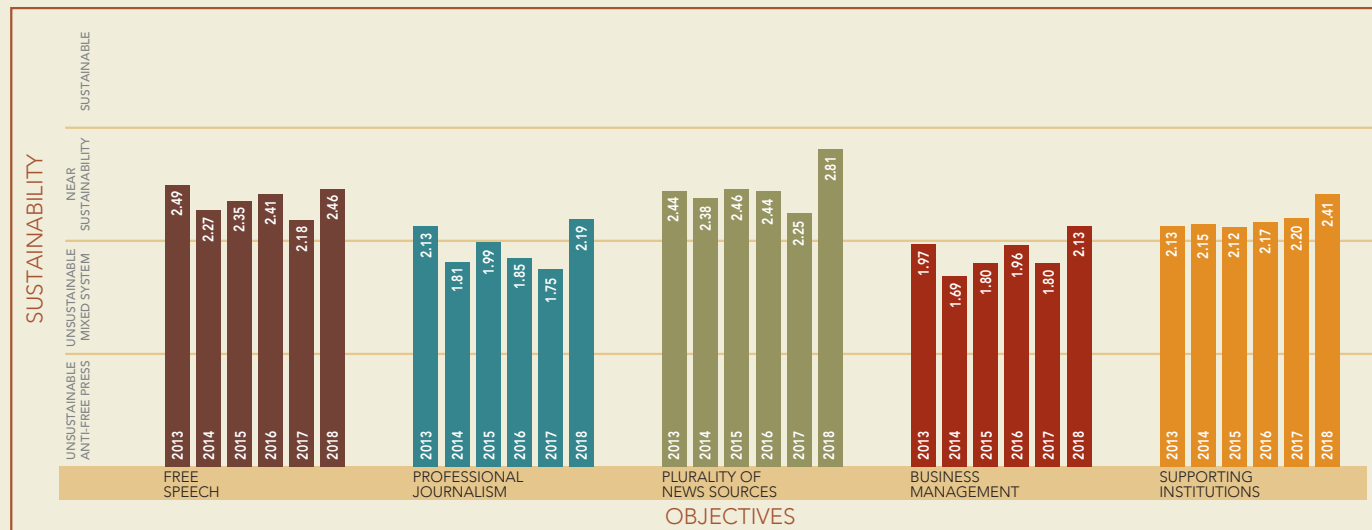
GENERAL

- **Population:** 620,029 (MONSTAT, 2011 – census)
- **Capital city:** Podgorica
- **Ethnic groups (% of population):** Montenegrin 45%, Serbian 29%, Bosniak 9%, Albanian 5%, other (Muslim, Croat, Roma [Gypsy]) 12% (MONSTAT, 2011 – census)
- **Religions (% of population):** Orthodox 72%, Muslim 19%, Catholic 3.5%, other 0.6%, unspecified 3%, atheist 1% (MONSTAT, 2011–census)
- **Languages (% of population):** Serbian 43%, Montenegrin (official) 37%, Bosnian 5%, Albanian 5%, unspecified 10% (MONSTAT, 2011 – census)
- **GNI (2016):** €3.954 million (MONSTAT, 2017)
- **GNI per capita (2016):** €6.354 (MONSTAT, 2017)
- **Literacy rate:** 98% (MONSTAT, 2011 – census)
- **President or top authority:** President Filip Vujanovic (since April 2013)

MEDIA-SPECIFIC

- **Number of active print outlets, radio stations, television stations, cable operators:**
- **Print Outlets:** 4 dailies, 3 weeklies, 30 monthlies; Radio Stations: 53; Television Stations: 17; Cable Operators: 5 (Agency for Electronic Media of Montenegro)
- **Newspaper circulation statistics:** Vijesti (private, circulation 3,500), Dan (private, circulation 6,500), Dnevne Novine (private, circulation 1,900), Pobjeda (private, circulation 2,400) (est. Direct Media Ltd.)
- **TV broadcast ratings:** (shares 1.1.17–12.27.17) PINK M 15.85%, TV VIJESTI 14.32%, PRVA TV 13.41%, RTVCG 111.83%, RTVCG 2 2.01%, other (satellite, local, regional) 42.59% (Direct Media Ltd.)
- **News agencies:** Mina News Agency (private)
- **Annual advertising revenue in media sector:** €10–11 million (est. Direct Media Ltd.)
- **Internet penetration:** 69.9% (Internet World Stats, 6.30.17)

MEDIA SUSTAINABILITY INDEX: MONTENEGRO



SCORE KEY

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

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

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

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

Scores for all years may be found online at <https://www.irex.org/msi>



With improvement in scores across all objectives, Montenegro shows promising progress. While its overall score puts it in the Near Sustainability ranking of the MSI, weaknesses in the country's media sector include low revenue generation, declining professional development opportunities, political biases, and low adherence to professional standards.

In June 2017, Montenegro became a full-fledged member of the NATO Alliance—a significant development for the country, marking the end of a long process. With Montenegro's accession, NATO allies now cover the entire Mediterranean coastline.

The accession also signals that pro-western liberal political forces are prevailing in Montenegro, thus accelerating the country's now well-underway negotiation process to join the European Union (EU). This geo-political momentum has also enabled Montenegro to weaken the adverse influence of official Russia, supported on the ground by local pro-Serbian ethno-nationalist and clerical forces. With this denouement, combined with convincing political victories for the ruling parties in the November elections in four Montenegrin municipalities (Cetinje, Mojkovac, Petnjica, Tuzi), Montenegrin foreign policy now points toward a Euro-Atlantic political, economic, and cultural orientation.

Political confrontations heated up over management of the national public service broadcasters (Montenegrin Radio and TV-RTV Montenegro). Parliament dismissed some members of the Council of the National Public Service (traditionally among the best-rated media in Montenegro, funded by the state and playing an enormous political and social role)—a move some nongovernmental organizations (NGOs) believe benefits the ruling coalition at the expense of neutrality. Furthermore, the EU Delegation to Podgorica and the U.S. Embassy warned publicly that the National Public Service's independent status must be protected from daily politics and party interests.

Time will soon tell whether changes in the Council will lead to political interference in the work of the key Montenegrin media, but the MSI panelists emphasized the importance of protecting the political neutrality and credibility of Montenegro's public media.

Politicized confrontations between leading private media companies persist, such as the confrontation between TV PINK, which many consider a propaganda tool in the hands of Montenegrin authorities, and private anti-government, pro-opposition media (Vijesti, TV Vijesti, Dan, Monitor). The politicization of media has, for years, obstructed the formation of a self-regulatory body, enabling frequent ethical violations. Still, there are media that are trying, regardless of their editorial policies or party preferences, to uphold standards.

On the business side, Montenegro's media has stagnated for years — in terms of revenue, number of employees, and average salaries in the media. Significantly, hands-on training of journalists has declined, compared with previous periods; educational programs are sporadic and insufficient. Most troubling, though, is the absence of strong, professional trade unions. In summary, professional standards are still being ignored, and despite obvious media pluralism, there is a huge discrepancy between the number of media outlets and the quality of their programs and editorial policies. Furthermore, the excess of political bias and lack of seriousness and accountability in enforcing professional standards and legally imposed obligations weaken democratic trends in the country.

**OBJECTIVE 1:
FREEDOM OF
SPEECH**

2.46

The panelists reported no changes to existing media regulations in Montenegro in the past year, nor adoption of new laws. The last relevant changes, related to the Law on Electronic Media and the Law on the National Public Broadcaster – Radio & TV (RTCG), happened last year. Under these changes, Montenegro has obliged itself to enable EU member states to rebroadcast content in its territory. In addition, legislative changes obligate public broadcasters (national and local public services) to produce and broadcast news, cultural, artistic, educational, scientific, children's, entertainment, sports, and other radio and/or television programs. At the same time, new regulations have imposed a ban on outlets that threaten constitutional order and national security; or that instigate hatred or discrimination on the grounds of race, ethnicity, gender, language, religion, political or other convictions, national or social status, financial status, membership in trade unions; or on the grounds of education, social status, marital or family status, age, health, disability, genetic heritage, gender identity, or sexual orientation. Within the context of these changes, RTCG implemented appropriate modifications to improve the financial sustainability of the national public service (the government is obliged to allocate 0.3 percent of the GDP to fund the National Public Broadcaster).

However, it is important to note that the fundamental Law on Media, adopted in 2002, has not changed significantly since 2011. This law is partially outdated now, given changes introduced by the digital age and expansion of online journalism. Nevertheless,

Montenegrin media legislation basically reflects internationally standardized journalism norms and essentially reflects freedom of speech and democratic public order. Media legislation enables and protects free speech, representing a solid legal framework for the media community.

In this respect, both professionals and the general public agree that the legislative framework enables free speech and does not pose a barrier for the development of professional journalism. Media law professor Aneta Spaic said, "The media legal environment in Montenegro relies, to a great extent, on international legal instruments, such as the European Convention on Human Rights and Fundamental Freedoms, while enforcement of media law relies on the European Court for Human Rights case law. National legal solutions regulating freedom of expression, freedom of media, and censorship bans, as well as access to information, are proclaimed at the level of international standards regulating human rights and freedoms." Slavko Mandić, director of Radio Skala in Kotor, agreed that laws protect free speech. He said, "Free speech is guaranteed, but numerous media abuse free speech and often publish uncorroborated information; we have slander and a lot of sensationalism." A Pobjeda journalist added, "Free speech is not questionable in Montenegro and so far has not been threatened. Legislation and case law are also undisputable. So far, not a single journalist has been prosecuted for protecting a source." Jadranka Vojvodić, deputy director of the Electronic Media Agency, added, "We have constitutional and legal guarantees protecting free speech, as well as legal protection mechanisms, but still insufficient awareness on the importance of free speech for the overall democratic development of our society. Public condemnation is not an efficient mechanism for improving free speech, and this is hindering development of self-regulation and

an accountable and professional media."

While the panelists consider Montenegro's legislation sound, aligned to a great degree with international legal standards in the area of free press, they agree that the key problem is in the enforcement of media legislation, meaning that in reality there are often discrepancies between rights guaranteed and protected by media regulation and everyday practice within the media community.

The Agency for Electronic Media oversees the licensing of electronic media, and the panelists reported no changes this past year in this domain. However, it is obvious that the licensing process

Legal and social norms protect and promote free speech and access to public information.
FREE-SPEECH INDICATORS

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

failed to keep pace with technological progress in the media sector, and therefore appropriate legislative changes are needed. On the other hand, key objections coming from the media community relate to the regulator's tolerant treatment of certain media outlets with programs that often violate professional standards and legally prescribed media principles (harsh criticism is often directed at TV PINK, headquartered in Serbia). On that note, Vojvodić said, "We need to change the legislative framework in order to catch up with technological development and the way people access online platforms, but we also need to improve mechanisms for monitoring transparency of ownership and the funding of media companies." Sonja Drobac, editor-in-chief of TV PRVA, added, "The licensing process has remained unchanged despite the fact that the digitalization process has been completed in Montenegro, and this should bring the price of services down. In addition, the regulator is not reacting to the expansion of cable operators who enjoy a privileged position on the market, representing unfair competition to licensed electronic media."

Clearly, the panelists said, future legislative changes must take into account the specific position of cable operators operating under provisions of another law (the Law on Electronic Communications), as they are obtaining their licenses from another regulator—the Electronic Communications Agency. The panelist recommended that next steps should involve reviewing the legal and commercial consequences of the current status of cable operators, as they are broadcasting quite a diverse array of local and foreign television channels, thus putting huge competitive pressure on electronic media licensed to operate in Montenegro's media market.

Media companies, apart from specificities

related to electronic media, enjoy equal status with other types of businesses in Montenegro. Media companies are established in line with the Company Law, and all of its provisions apply to them just as any other company, including taxes. Print media companies (dailies and magazines) constitute the only exception, as they are taxed by a lower VAT (value-added tax) rate of seven percent (the higher VAT rate is 19 percent). Some media companies have used a governmental program to pay taxes in installments. In this respect, journalist Jadranka Rabrenović said, "There are no differences in treatment of media companies with respect

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to others. Recently, the owners of TV Vijesti and Vijesti were given an option to pay due taxes on 60 installments, and other companies received a similar option as well. In addition, electronic media were given an option to pay due fees to the Radio Broadcasting Centre, but later on, the government decided to support them by means of state aid, so the entire debt was covered by these funds."

This year the panelists reported no cases of violence against journalists. In this respect, the most important event happened when Montenegro's Constitutional Court decided in November 2017 to uphold the complaint related to an ineffective investigation regarding a murder attempt on journalist Tufik Softic. The Constitutional Court determined that police and prosecutorial

investigations were ineffective and awarded EUR 7,000 (\$8,600) in compensation to Softic. This decision marked an important milestone: the Constitutional Court's compensation of a journalist in Montenegro. This ruling confirms that the government has not done enough to protect the journalist in his work and therefore, due to its inaction, threatened media freedom. This ruling confirmed the public's general impression that the police and judiciary are still inefficient and lack the will to solve cases of violence against journalists. However, the court's verdict marks an encouraging step forward in terms of increased protection of journalists in Montenegro.

The laws impinge the editorial independence of national or local public media (national and local public services). The Law on the National Public Broadcaster – Radio & TV (RTCG) Montenegro has a special chapter dedicated to the national public service's independence and explicitly defines RTCG's independence in program editing. In addition, the law also stipulates that RTCG has independence in creating a program scheme, defining its production concept and program broadcasting, editing and broadcasting news on topical events, and organizing its operations. Furthermore, the law also says that RTCG journalists are independent in their work and that they are working in the public interest. The legal protection of journalists is additionally strengthened by a ban on firing journalists, reducing their salaries, or changing their status within editorial teams when they express an opinion or position in line with professional standards and program rules. However, political interference in the operations of public service broadcasters is evident in practice and is particularly reflected in the dominance of ruling parties' interests in management bodies of these services. Currently, the media community is witnessing changes in the RTCG Council triggered

by the Anti-Corruption Agency, regarding the alleged conflict of interest of some (four out of nine) Council members. The opposition and the politically neutral general public view these changes as politically motivated, in keeping with the interests of the ruling parties. These cases are just another confirmation that proclamations of editorial independence often come into conflict with dominant political interests at the national and local level.

Libel has been decriminalized in Montenegro, and the criminal code does not list libel or slander as a criminal offense, thus protecting journalists from imprisonment for these types of charges. Therefore, libel and slander are processed as civil cases before the court, and the aggrieved party may seek compensation for non-material damages for defamation.

Montenegro is one of a handful of countries in the region that has complied with Council of Europe recommendations to decriminalize libel. However, ever since the decriminalization of libel, media professionals and the general public have debated whether that was the right thing to do, questioning whether this move supports the freedom of expression or serves as an open invitation for anybody to libel citizens and institutions. Vojvodić observed, "Although libel is now the domain of civil law, the lack of commitment and dedication in enforcement of professional standards, as well as the media's tendency toward sensationalism, are leading to abuse of free speech." Spaić added, "Comparative analysis tells us that it was rather reckless to establish a legal framework that does not exist in any of the EU founding states, except for the UK, so it turns out that our politicians and civil society activists have ignored the level of our societal development and potentially harmful consequences stemming from decriminalization of libel."

Regarding access to official information, the

panelists said that problems with enforcement persist. In 2012, Montenegro adopted its Freedom of Information Act in line with Venice Commission recommendations. This law aligns with the Convention on Access to Official Documents and international standards in this area. Therefore, the regulatory framework in this area is well developed and tested. The problem is traditionally related to the law's enforcement, and the panelists agreed that collecting information from the government is a slow and inefficient process. Media have different experiences with different government or local administration services, as not all of them are organized and accessible in the same way.

When it comes to accessing international and local news and media sources, Montenegro is, almost traditionally now, an open society, and there are no legal or actual limitations in this respect. Information from international and local sources is not censored or banned and therefore is accessible to all media outlets. Similar to the global digital environment, Montenegro is witnessing an increasing number of different forms of online journalism (portals, sites, blogs, social journalism, etc.), and this is definitely pushing out traditional media. At this point in time, according to Internet World Stats some 70 percent of Montenegrin citizens have Internet access—a clear indicator of the level of penetration and accessibility of the ever-growing access to digital forms of expression. Therefore, Montenegro's media environment enables free access and usage of both local and international sources of information.

Montenegro's government has never required a license to work as a journalist. In this respect, media companies are free to set their own criteria and conditions for aspiring journalists, meaning that the authorities have no influence on recruitment of journalists and there are no limitations in this

respect. Therefore, the journalism profession is an open one, with no required licenses. However, media companies themselves have certain criteria: They generally seek to recruit college-educated staff with a certain level of professional experience.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

2.19

For years now, the media community has been critical of the professional achievements of Montenegrin journalists; the panelists were unanimous in their assessment that Montenegrin journalism does not meet very high professional standards. Reporting is often not objective, and journalists use selective and unverified sources of information. Mila Radulović, a Vijesti journalist, said, "Some journalists and media outlets publish unprofessional articles often backed by interest groups, individuals, or parties that are just using them to attack their opponents." Dan journalist Rajka Raičević added, "With online media we see quite a lot of plagiarism; entire articles are simply copy-pasted from one portal to the next without mentioning the source, or even trying to edit the article to reflect the publisher's geographic location." Additionally, said RTCG journalist Tatjana Perović, "Cases of superficial reporting, without checking published information, is evident. Furthermore, depending on a media's affiliation to some interest groups, we can often see one-sided reports." It is obvious to the panelists that the general public believes that journalism is in a crisis, degraded as a profession for years now. Journalism is often subjected to political, corrupt, and commercial pressures, and journalists, due to their poor

financial status, are prone to succumb to these pressures, thus damaging their own status and professional credibility.

Last year, the media community adopted a new and improved Code of Ethics—a step forward in defining the rules for ethical and professional journalism, as it introduced the highest professional and ethical standards. It obligates journalists to undertake all reasonable steps to ensure they are publishing only correct information and fair comments. Under the code, journalists should never publish information known to be false or malicious or that put forward unfounded accusations that damage the subject of their story's reputation. There is no doubt that even the previous version of the Code of Ethics, just as this improved one, is the example of a good regulatory

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).

framework for the journalism profession. However, as always, the problems emerge when it comes to enforcement of the ethics code and compliance with its principles and guidelines. "The Code of Ethics has been accepted by all media outlets in Montenegro, but only a handful of journalists have it on their work desks and are actually aware of the code's principles and rules," noted Olivera Nikolić, director of the Montenegro Media Institute.

Raičević cautioned, "It is impossible to claim that we have colleagues violating journalists' standards and the Code of Ethics by accepting improper gifts or writing ordered articles. These issues are in the domain of speculation and hearsay, but without solid proof." However, it is clear that panelists, professionals, and the general public consider professional journalism standards insufficiently enforced in the country. Although the self-regulatory body and ombudspersons in certain media outlets monitor observance of the code, achievements in terms of holding professional journalists accountable for lapses are limited. A particular problem stems from the media community's division on the issue of self-regulation, because for years now Montenegrin media have not all agreed to participate in the work of the Media Council for Self-Regulation, which reflects negatively on the quality and prospects to properly enforce the code.

The panelists generally agree that Montenegrin journalists self-censor, although people rarely talk about it. Even within the media community, there is no significant debate on self-censorship and its consequences. As Rabrenović said, "I think that self-censorship is present in the media, mainly because people are afraid of losing their jobs." Furthermore, most of the panelists think that self-censorship is more ubiquitous in the public media under the influence of national or local authorities. Generally speaking, it is clear that

self-censorship directly correlates with ignoring professional standards, the weak economic status of journalists, the lack of strong trade unions in journalism, and business and professional discord within the media community.

Journalists do not face any practical obstacles in reporting about key events in Montenegrin society. Rabrenović added, "Media cover every important event, and we haven't recorded a single case of anyone being banned from reporting on a certain event. However, the political orientation of media owners can be easily guessed, based on the length of the article or report, and also in terms of its placement in the newspapers or television bulletin." Nikolić shared her position that there is no ban on reporting and added, "Journalists and media usually try to inform the public on important issues. However, it is noticeable that the same events are perceived from different angles. Furthermore, for journalists it is still sensitive, and even dangerous, reporting and bringing out in the open high-level corruption and organized crime cases. Media outlets that report regularly on dangerous issues can be exposed to pressures that hinder their work and operations in general."

For those reasons, some key events, problems, or main social issues are not adequately covered. Generally speaking, though, media do report on all issues, and in this respect, there are no differences between print, broadcast media, online media, and social networks (YouTube, Facebook, Twitter, Instagram). In practice, events might be interpreted differently or given more prominence in the news stream depending on editorial policies and commercial interests.

Montenegrin journalists typically earn low wages, with Radulović noting, "With respect to the importance of their work and their level of accountability, journalists are poorly paid. Salaries differ,

depending on the success level of a given media, but I have to say that salaries in independent media are better than in pro-government outlets. Generally speaking, low salaries and hard work push a lot of journalists to leave the profession." Mandić added, "Journalists' salaries are below the rank of their profession, and this has a huge impact on the quality of their reporting." Furthermore, said Predrag Zecevic, editor-in-chief of Analitika, "For the sake of illustration, this year media posted 227 jobs [through a government-supported employment initiative where the government covers salary], but only 47 people applied. This example is the best illustration of the weak interest young graduates display to work in the media industry."

The problem of low salaries in journalism has persisted for years, and this, in turn, discourages people from working in the industry. Only journalists holding top editorial positions and a handful of reputable journalists can count on net salaries exceeding EUR 1,000 (\$1230) per month, while the average salary in the media industry does not exceed €450 (\$540). On the other hand, the number of unemployed journalists is on the rise due to the economic crisis, and there are few alternative prospects, let alone hope for salary increases. It is clear that stagnating salaries, in the long run, will negatively impact retention in the field, at the same time leaving media companies with low-quality staff—further diminishing the profession's reputation. These factors force journalists to seek additional sources of income, to the detriment of the overall quality of work in the field.

Entertainment, commercial, musical, and sports programming—at the expense of news and cultural-educational programming—has dominated Montenegro's media industry in the past decade. Private media focus mainly on entertainment, although there are strong private media—both print

and broadcast—with top-rated news programs, in terms of audience numbers (for example, TV Vijesti and the dailies Vijesti and Dan). RTCG is one positive example in terms of its focus on news and cultural-educational programs, although that is its legally prescribed mandate. However, there are top-rated television channels that dominate the market primarily thanks to commercial entertainment and reality programs, which are frequently of dubious and questionable quality (the panelists pointed to TV PINK as an example). In terms of radio, the country has numerous stations

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that focus exclusively on music and entertainment programs. A positive exception to this rule is radio ANTENA M, which has survived for two decades now, broadcasting numerous news and political shows. All in all, public media present more educational and news programs, but frequently some private media base their programs on investigative journalism with a focus on public interest, professionalism, and news programs.

Media digitalization is now in its final stage in Montenegro, and all leading television media companies have made the switch. Furthermore, the influence of web portals is increasing, and online media consumers now far exceed print media readers. Just as in previous years, four portals dominate Montenegro's online market: Vijesti, CDM, Analitika, and Antena M, which also belong to the leading media

companies. By the numbers, visitors to these portals far surpass the readers of all dailies in Montenegro, including Vijesti, Dan, Pobjeda, and Dnevne Novine.

When it comes to technical capacity and production and the distribution of equipment, panelists indicated that Montenegrin media have clearly increased and modernized their capacities in recent years.

In terms of specialized reporting, though, the country is coming up short. Drobac said, "There are absolutely no possibilities within electronic media to carry out respectable and specialized reporting. The reason, very simple, is the lack of funds." Radulović added, "Some media outlets have journalists following certain issues, but they are few and far between. That is why the quality of articles is going down and reporting is superficial. Investigative journalism is poorly developed because editorial teams must appoint a journalist just for this purpose and give them sufficient funds to do their job; that is why most media opt to give up investigative journalism." Raičević added, "We do have investigative journalism in Montenegro, but that is still below the level we see in developed countries. Bearing in mind the fact that nepotism is deeply rooted in Montenegro, that corruption is omnipresent, and that editorial teams have few journalists to work with, it is logical that investigative journalism's impact is weak." According to the panelists, there are few examples of specialized or investigative journalism. Media do not have enough funds to support the development of specialized reporting. On the other hand, the panelists pointed to an encouraging trend: signs of this type of journalism emerging within RTCG.

The panelists call on media companies to set up funds for investigative and specialized journalism, which, in turn, would strengthen the reputation and credibility of journalism.

**OBJECTIVE 3:
PLURALITY
OF NEWS**

2.81

Many media outlets dot Montenegro (some 80 broadcast and print, national and local media outlets—on average, one media outlet per 7,800 residents), making the country one of Europe’s most media-saturated, according to the panelists. For more than five years now, four dailies have been printed in Montenegro (Vijesti, Dan, Pobjeda, and Dnevne Novine). Four national television stations (TVCG [public service], TV Vijesti, PRVA TV, and TV PINK), as well as two national radio stations (Radio Montenegro [public service] and private Antena M) cover the country’s broadcast sector, along with 50 broadcast media at the local and regional level. The rising number of web portals are pushing out printed media, recording more than 150,000 daily visitors, according to Zecevic. The dominant portals in Montenegro are Vijesti, CDM, Analitika, and Antena M.

Jadranka Rabrenovic, a journalist with Pobjeda, pointed out that although media outlets promote their own positions, “citizens are able to access information from numerous media and form their own realistic picture by comparison and based on their experience with given media. There are numerous media in Montenegro, and therefore media pluralism is strong.” She added, “There are a lot of media—pro-government and independent—portals, newspapers, and television stations ... there are also social networks, so there is no way to hide information, and by simple comparison one can determine what certain media overlook. Most of the media outlets have their own social network profiles where additional information is placed.”

Agreeing with previous speakers, Ivana Jabucanin, editor-in-chief of local Radio Cetinja, said, “Generally speaking, we do have a plurality of media sources in Montenegro, but sometimes media reports on a given event are strikingly one-sided. On the other hand, we also have situations when different media have totally opposite takes on the same event. Almost all media have their own smartphone applications or platforms adjusted to smartphone browsers, and social networks represent an abundant source of information as well.”

Therefore, Montenegro’s citizens have sufficient access to sources of information, and the ability to compare news and information. However, it is important to note that media interpret information through their own editorial lens, and not all report objectively. Citizens are faced on a daily basis with an abundance of information, and the ordinary viewer or reader sometimes has a hard time making sense out of it and coming to sound conclusions on a certain event.

In Montenegro, no legal or administrative obstacles prevent citizens from accessing local or international media. Antena M journalist Zarko Vujovic commented, “Citizens’ access to local and international media is not limited, and we can say that media space is completely open.” Rabrenović agreed, adding, “There are no limitations for citizens to access media, both local and foreign.” The global media environment is free, and in this respect, Montenegro is an example of an open media market and country that does not limit access to different sources of information. Of course, some people face financial barriers, but that is really the only obstacle to speak of in terms of access to local and international media. However, Internet and cable prices are increasingly competitive, and they’ve fallen compared to last year. Unlimited Internet access costs around EUR 20 (\$25) per month, while the monthly bill for

cable services is approximately EUR 15 (\$18).

Regarding public media and balance, Radulović said, “State-run media mainly promote the ruling party and government policies; last year they did not display a lot of openness toward different positions, especially those coming from the opposition or civil society. However, the appointment of a new RTCG manager is bringing change. Now, the national public television service airs different voices, although the same cannot be said for the national radio station.” In Jabucanin’s experience with Radio Cetinje, programs are balanced. “For example, we recently had local elections in Cetinje, and our reporting was balanced and politically

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neutral. Observing other public services, I can see certain progress in terms of objective and balanced reporting.” In general, though, most of the panelists feel that national and local public services still fall under strong political pressure or even direct control of the ruling parties.

Since the establishment of national and local public service broadcasters, editorial policies have failed to reflect all political views. The dominant editorial trend with public services is to give an advantage to the ruling parties, and marginalize opposition or critical voices. This norm applies to whichever party is in power in a given municipality.

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.
- ▶ 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.
- ▶ 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.
- ▶ A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.
- ▶ Independent news agencies gather and distribute news for print and broadcast media.
- ▶ Broadcast ratings, circulation figures, and Internet statistics are reliable.

The only exception is the National Public Service; in recent years, it has swung from strong support to the ruling parties to a more neutral political position in keeping with its public service mandate. When it comes to the programs of private broadcasters, TV Vijesti director Marijana Bojanic said, "Our media company has been trying since day one to design its news programs in the model of public service, and we always tried to produce our programs conceptually close to the broadcaster that reports and abides by the rules of a national public service."

Those media that can afford it regularly use news agency content, whether from local or foreign sources. The most powerful media rely on their correspondents' network and use little from

local agencies, turning to news agencies primarily for foreign affairs. Montenegro traditionally draws from regional news agencies (mainly from Serbia); there is still just one Montenegrin private news agency, MINA—and with limited resources, it does not have the capacity to meet information demands of local media.

All the private media try to produce their own news programs, although the results vary significantly in quality. When it comes to television stations, the undisputed leader is definitely TV Vijesti, and among radio stations Antena M. Nevertheless, most broadcast media put most of their limited staff and resources into entertainment and sports production, ahead of news. Apart from RTCG—which, especially recently, is very much engaged in producing news and political programs—private broadcasters, except TV Vijesti and TV PRVA, rarely ever organize political debate shows or cultural programs, documentaries, special investigative programs, etc. At the local level, production of news programs is sporadic and obviously limited. In addition, in recent years individual online journalism has developed, in which actors are using social networks and different online channels to place their own news or informal programs.

Transparency of ownership over media is ensured, according to Spaic, "as all data on media ownership structure, with details on percentage of shares, are published. The Agency for Electronic Media regularly updates the registry of electronic media, while information on print media owners can be found on the website of the Central Registry of Companies, where all media companies are registered." All public registries, covering both electronic and print media, are easily accessible, and data on formal, legal ownership, capital, and management in Montenegro's media sector can be checked rather easily online. Regarding the potential

reform of public registries, the panelists suggest setting up a unique registry to identify all the media in Montenegro (Central Media Registry), detailing all data important for transparency.

So far, no cases of illegal media monopolies have been detected in Montenegro, although there are two large media groups operating on the market. One is dominantly owned by local owners (TV Vijesti, daily Vijesti, online Vijesti, the weekly Monitor), while the other group is foreign-owned (Pobjeda, Dnevne Novine, and the online CDM).

Most of the panelists do not feel that the media sufficiently reflect the wide spectrum of different social interests and groups in society. They also believe that political and corporate centers of power control the editorial policies of Montenegro's private media. Of course, there are some media outlets that try to cover a broader array of social interests—such as national and local public services, which also deliver programs in minority languages. Ulcinj-based TV Teuta is one example, and different private media broadcast programs in the Roma language. Although media do publish some information on different social issues and events in Montenegro, not all of the social groups and concerns receive equal play, the panelists said.

Montenegrin media—including local media—clearly try to publish news of local, national, or international importance, regularly reporting on a range of issues. Thus, the public is not deprived of information on important local, national, or global events. The expansion of the media space, with online journalism and social channels, has also broadened access to different domestic and international information sources.

**OBJECTIVE 4:
BUSINESS
MANAGEMENT**

2.13

For many years now, the media industry's dire economic situation has been widely known. Although there are quite a lot of media companies, Montenegro's media industry cannot be called economically viable and profitable.

A great many media companies are unable to pay their dues to the Radio-Broadcasting Center (as electronic media are obligated to do, because they use transmitters) or even pay their taxes regularly. Even the leading media, such as TV Vijesti and Vijesti, were forced to reprogram their tax debt. On the other hand, print media face fierce competition from web portals, and their circulation is on the decline. Markešić estimated that newspaper circulation has fallen some 60 percent in the past 10 years (in terms of daily circulation). This is reflected in the shrinking media staff sizes, which have not exceeded 1.5 percent of Montenegro's overall numbers of employed people in recent years, according to Zecevic. At the same time, the average salary for media professionals has for years fallen below the national average. The harsh economic circumstances seem likely to force a number of media outlets, especially in the private sector, out of business in the coming years.

Radulović noted, "Private media companies are struggling to make ends meet, while advertising revenues are constantly falling due to the economic crisis. That is why many media are trying to build ties with civil society and foreign donors, to bring in more revenue. On the other hand, public media enjoy a much better position, with guaranteed funding from either state or local budgets." Dragan Markešić, manager of the marketing agency Direct

Media, added, "Media are trying to survive, just like every other company, paying due attention to all aspects of their businesses. Of course, some media are better at it than others. Now the main question is, can all those media companies survive on the market—because, regardless of their organizational and managerial capacities, the problem is that we are talking about an extremely small market."

Regarding the advertising market, Markešić noted, "Advertising is still not sufficiently developed, because not all the conditions are met yet—especially in terms of a broad spectrum of market surveys. On top of that, bearing in mind the size of the market, there are too many advertising agencies. Telecommunications companies are the biggest buyers on the advertising market, while media companies set the advertising prices. Aside from these big advertisers, a lot of money flows from small clients—small ads; administrative notifications from government, local, and public institutions; classified ads, such as congratulatory notes, obituaries, etc. Local media generally receive far less money from advertisers, and branch offices of big regional advertising agencies dominate the whole market. The segment of so-called direct advertisers dwindles by the year, and the majority of clients are advertising through ad agencies rather than through direct contracts with media companies."

This past year brought no dramatic changes in the advertising market and the share covered by the advertising agencies. Unlike last year, when due to the parliamentary elections the advertising market recorded 10–15 percent growth, this year the average value of the market (covering commercial advertisers) sat at roughly €11 million (\$13.2 million).

Clearly, advertising revenue cannot sustain the media companies in the long run. With so many media outlets on the advertising market, competition is stiff, and the biggest share of the advertising

cake, according to DIRECT MEDIA DOO roughly half, goes to television outlets. Around 10 percent of ad revenues goes to online ads (through social networks, for example), while some 25 percent goes to street advertisements. The little that remains goes to other media. Moreover, because of its comparatively small population size, Montenegro's advertising market gets just 1.5 percent of the regional ads—a market valued at €600–700 million (\$718.7 - \$838.5 million) according to DIRECT MEDIA DOO—slated for Southeast Europe. Just as in previous years, television—the three private outlets (TV PINK, TV VIJESTI, and PRVA TV), as well as the public service broadcaster TVCG—pulls in the most advertising revenue. Moreover, private media still face unfair competition from the public media, which sell advertising time and space and also benefit from a steady stream of funding from national or local budgets.

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.

Aside from the commercial advertising market, ads purchased by the government, local administrative bodies, and public institutions constitute another revenue stream valued at about €2 million (\$2.4 million) annually, according to DIRECT MEDIA DOO. Currently, DIRECT MEDIA DOO approximates that 80 percent of revenue flows from the leading advertising agencies, while the remainder comes from clients directly contracting advertising services with media companies. As in previous years, key commercial advertisers focus on private media with national coverage, leaving local media vying for leftovers.

Radulović noted, “Private media companies are struggling to make ends meet, while advertising revenues are constantly falling due to the economic crisis. That is why many media are trying to build ties with civil society and foreign donors, to bring in more revenue. On the other hand, public media enjoy a much better position, with guaranteed funding from either state or local budgets.”

Most Montenegrin media companies are barely viable, as demonstrated by the media’s frequent requests for the government to provide benefits or subsidies to support media companies. In the meantime, media are figuring out how to stay afloat and secure funding; they are always seeking new donors to supplement funding from their owners and advertising revenue. Bearing in mind that Montenegro’s market is rather small, media companies are practically forced to seek these alternative models of funding or as a last resort, beg

the government or local authorities for some kind of financial or administrative assistance.

Radulović said, “Subsidies and advertising, for years now, have been government tools used to influence the editorial policies of media outlets. This past year, it hasn’t been too visible, but it is still present.” There are no reliable data on the total value of advertisements placed by state advertisers (administrative notifications published by national or local authorities), but estimates approach EUR 2 million (\$2.44 million) per year according to DIRECT MEDIA DOO. In addition, a majority of the panelists question the degree of transparency surrounding the use of public funds for advertising purposes, because they suspect that the bulk of these funds go to pro-government media. By doing so, the authorities are turning the advertising market into a political weapon used to promote pro-government media companies.

Some panelists feel that the media sector, as a business, must enjoy appropriate financial and tax incentives that would ensure its economic viability—but these incentives, they said, should apply only to programs that are in the public interest.

Just as in previous years, the Montenegrin market falls short on advertising surveys, especially publicly accessible, credible, and professional surveys. Business surveys, related to strategic planning and economic growth, are few and far between. The lack of funds prevents media from investing in surveys that could be a powerful tool when projecting their development and long-term stability.

Generally, the panelists believe that detailed and reliable data on the ratings of television shows or circulation of printed media are rarely published. However, in the past two years surveys have been conducted to monitor the number of television viewers based on a method of measurement similar to people-meter ratings. However, media

dissatisfied with the results often dispute the data, leaving the general public confused when it comes to understanding and interpreting the outcome. In addition, print media do not publish their circulation numbers, citing a need to protect their business interests, and ultimately leave just informal sources to draw from in estimating circulation. However, the panelists agreed that in recent years there has been a dramatic decrease in print media circulation, as print media are slowly but surely losing the race with web portals and other forms of online journalism.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

2.41

Neither of Montenegro’s two electronic media associations, Association of Commercial Electronic Media (AKEM) and Association of Independent Electronic Media (UNEM), function properly, Mandić reported. “Less than 10 percent of all electronic media show any interest in the operations of these two associations, and nobody pays membership fees, so the associations are financially unsustainable and depend on sporadic assistance of external donors,” he said.

The problem is clearly perennial, with no serious professional association within the media industry. Despite the fact that formally there are several professional associations for electronic and print media, their activities are marginal, and their results, in terms of protecting the business interests of media companies, are minimal. In addition, the media industry’s continuing lack of cohesion and cooperation negatively affects the credibility, development, and social impact of these associations.

All stakeholders, the panelists emphasized, should be working to revive journalist and business media associations, in order to strengthen journalism and the media industry as a whole.

Radulović commented, “Yes, we do have two journalists’ associations, but most journalists are not members. In the past, associations were either controlled by the authorities, or they had a clear political orientation, and that is why journalists withdrew. At the moment, we do have the Media Trade Union, dealing with the economic and social rights of journalists, and the Association of Professional Journalists, which deals with professional standards. It is important to underline that

Radulović commented, “Yes, we do have two journalists’ associations, but most journalists are not members. In the past, associations were either controlled by the authorities, or they had a clear political orientation, and that is why journalists withdrew.

the Association of Professional Journalists is trying to regain journalists’ confidence by setting up mechanisms to provide legal aid to journalists. I would also underline the importance of the Montenegro Media Institute, which contributes to the development of professional standards and has been engaged recently to monitor implementation of the Journalists’ Code of Ethics.”

Still, journalists’ associations, unlike industry associations, show encouraging signs of progress. In the past two years, journalists have invested in setting up more effective, professional trade unions; however, deep divisions among media in Montenegro prevent some groups from participating,

handicapping these efforts. Right now, the Media Council for Self-Regulation has 19 members, while the most influential dailies, Vijesti and Dan, do not participate, relying at the moment on self-elected ombudspersons.

The panelists feel that NGO activities are of the utmost importance for the democratic development of society, protection of free press, and strength of civil community. Traditionally, Montenegro enjoys strong cooperation between media and NGOs, and thanks to their generally productive relationship, society has managed to protect itself from the pitfalls of partisan politics. Several thousand NGOs operate in Montenegro, in different segments of the society. It is clear that the NGO sector has managed, in the past two decades, to build a strong standing and reputation within society, reflected in support from citizens and relevant international organizations alike. Journalists often rely on NGOs as sources.

The panelists reported a decline in journalism training, noting that universities do not provide training in practical skills, and most media companies do not do enough to educate their journalists. However, Nikolić said, “At the state-run School of Political Sciences, they have a department for journalism, and students are being given opportunities to gain hands-on experience. Having said that, the teaching quality could be improved, and students should be given opportunities to gain additional skills. We also shouldn’t forget that reputable international organizations are supporting the media sector, investing in journalists’ training through various projects.” Spaić added, “The School of Political Sciences has offered a course in journalism for years now. The school’s guidelines suggest that 25 percent of the course must be in the form of hands-on training; the school is currently working on deals with influential media companies to provide this training for its students.

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.
- ▶ Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- ▶ Sources of newsprint NGOs support free speech and independent media.
- ▶ Quality journalism degree programs that provide substantial practical experience exist.
- ▶ Printing facilities are in private hands, apolitical, and unrestricted.
- ▶ Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.
- ▶ Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

It is important to note that the Montenegro Media Institute can serve as a center for the permanent training of journalists.”

Overall, however, the panelists see improvement in terms of training, pointing to encouraging signs in education and opportunities for hands-on, ongoing training for working journalists. In addition, the Montenegro Media Institute is on sounder financial footing now; money is being invested in developing the institute’s capacity, and this will definitely improve productivity and the overall benefits that the institute brings to Montenegro’s media community. Nikolić said, “Media [outlets] do implement some short-term trainings, mainly driven by international donations

from the EU, USA, or OSCE. Those trainings, for the most part, do reflect real needs of local media." Unlike in recent years, this year the panelists reported significant improvements in hands-on training and professional skills in journalism. This progress is dominantly linked to the most influential media, usually those with national coverage.

There are no limitations or monopolies regarding procurement of equipment for printed media. Just as in previous years, technical capacity significantly exceeds Montenegrin market needs, and they are simply a reflection of irrational business policies.

Distribution channels are apolitical, free, and depend solely on commercial criteria and market conditions. The panelists have not detected any restrictions that would threaten the sale of press or free operations of telecommunications operators. They say there is competition on the market and a national regulator in the area of telecommunications and postal services (Agency for Electronic Communication and Postal Services).

Every year Montenegro's telecommunications infrastructure expands—a clear sign that in this respect, Montenegro follows European and international standards. The electronic media digitalization process is complete, now covering practically all households in Montenegro. The reach of ICT technology has attained a satisfactory level, and Internet penetration on the rise. The mobile phone industry is highly developed and very competitive (with four operators in the area of mobile and land lines); from a technical point of view, it covers practically the entire country. Almost all adults and many minors in Montenegro own a mobile phone. Increasingly, people use smartphones to access the Internet, place advertisements, download applications, and interact on social networks, such as Facebook, Twitter, and Instagram.

List of Panel Participants

Tatjana Perović, editor, National Public Service RTVCG, Podgorica

Marijana Bojanic, director, TV Vijesti, Podgorica

Sonja Drobac, editor-in-chief, TV PRVA, Podgorica

Žarko Vujović, journalist, Radio Antena M, Podgorica

Predrag Zecevic, journalist, Portal Analitika, Podgorica

Mila Radulović, journalist, daily newspaper Vijesti, Podgorica

Jadranka Rabrenović, journalist, daily newspaper Pobjeda, Podgorica

Rajka Raičević, journalist, daily newspaper Dan, Podgorica

Ilmira Lika, director, TV Teuta, Ulcinj

Ivana Jabucanin, editor-in-chief, Radio Cetinje, Cetinje

Slavko Mandić, director, Radio Skala, Kotor

Olivera Nikolić, director, Media Institute, Podgorica

Aneta Spaic, professor, University of Montenegro, Podgorica

Jadranka Vojvodić, deputy manager, Agency for Electronic Media, Podgorica

Dragan Markešić, general manager, media buying company Direct Media Ltd., Podgorica

Moderator and Author

Rade Bojović, MEDIA DOO director, Podgorica

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