

MONTENEGRO



MEDIA SUSTAINABILITY INDEX 2019

Tracking Development
of Sustainable
Independent Media
Around the World



MONTENEGRO

AT A GLANCE

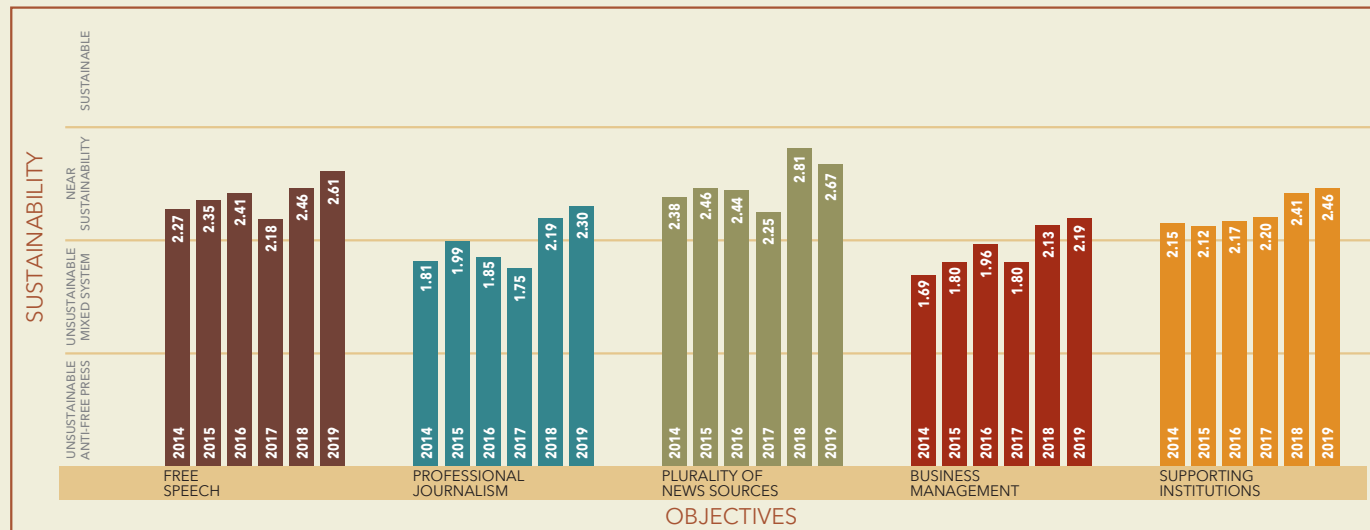
GENERAL

- **Population:** 620,029 (Population census 2011)
- **Capital city:** Podgorica
- **Ethnic groups:** Montenegrins 45%, Serbs 29%, Bosniaks 9%, Albanians 5%, other (Muslims, Croats, Roma) 12% (Population census 2011)
- **Religions:** Orthodox 72%, Muslim 19%, Catholic 3.5%, other 0.6%, unspecified 3%, atheist 1% (Population census 2011)
- **Languages:** Serbian 43%, Montenegrin (official) 37%, Bosnian 5%, Albanian 5%, other 10% (Population census 2011)
- **GDP (2017):** €4.299 million (\$4.901 million) (Montenegro Statistical Office)
- **GNI per capita (2017):** €7,049 (\$8,036) (Montenegro Statistical Office)
- **Literacy rate:** 98.5% (Population census 2011)
- **President or top authority:** President: Milo Đukanović (since May 2018)

MEDIA-SPECIFIC

- **Number of active print outlets, radio stations, television stations:**
- **Print:** 4 dailies, 1 weekly, 30 monthlies (est.); radio stations: 53*; television stations: 19*; cable operators: 5*; news websites: 10-15 (est.) (*Agency for Electronic Media of Montenegro)
- **Newspaper circulation statistics:** Vijesti (2,900, private), Dan (6,000, private), Dnevne Novine (1,900, private), Pobjeda (2,600, state-owned) (estimates by Direct Media Ltd.)
- **Broadcast ratings:** (audience share, November 2018)
Nova: 12.37%
Vijesti: 11.25%
Prva TV: 11.72%
RTVCG 1: 10.48%
RTVCG 2: 2.46%
Others (satellite, local, regional) 51.72% (Direct Media Ltd.)
- **News agencies:** MINA (private)
- **Annual advertising revenue in media sector:** €10 million to €11 million (estimate by Direct Media Ltd.)
- **Internet usage:** 71.27% (International Telecommunication Union, 2017)

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>



The Montenegrin media landscape continues to be riddled with low ethical and professional standards and manipulated by political and commercial influences. Private media, especially, are struggling to survive as they cannot adequately compete with state broadcasters for advertising revenue. Plurality of news is Montenegro's highest scoring category at 2.67 due to the ever-increasing number of media outlets and sources, however much skepticism remains as not all of these media outlets are producing high quality content. Montenegro sits in the middle of the near sustainable category with an overall score of 2.45.

Montenegro held presidential and local elections in early 2018. In the presidential contest, the winner was Milo Đukanović, leader of the Democratic Party of Socialists. This party has had a lock on power since 1990. Đukanović was nominated by a coalition of pro-Western parties and has served as either prime minister or president of Montenegro since 1991, with a few brief interregnums. The opposition managed to unite behind its candidate, Mladen Bojanić, only late in the campaign. Đukanović defeated Bojanić in the first election round and won a five-year term.

Local elections, which took place in 14 of the country's 24 municipalities, cemented the power of the ruling pro-Western and pro-European parties at every level. The vote rendered irrelevant the opposition parties, most of which still resist Montenegrin independence and receive support from conservative and nationalistic political forces in neighboring Serbia and Russia.

In the economy, according to [MONSTAT](#), Montenegro's impressive GDP growth from 4.5 percent to 5 percent masks unsustainable trends. The public debt is near 70 percent of GDP, unemployment sits at around 14 percent, and the average net monthly wage is approximately €510 (\$581). At the same time, the public sector employs some 33 percent of all workers, while 120,000 pensioners are supported by only 190,000 workers.

Last year once again saw little improvement in the media environment. Private media continued to struggle while political conflict led to two top managers being ousted from the public broadcaster, Radio-TV of Montenegro (RTCG). The RTCG Council, which is dominated by the ruling coalition, instigated the firings. By law, RTCG receives 0.3 percent of the Montenegro annual GDP. It pulls in a large audience and its programming carries social and political weight among consumers.

In addition, some private media continued to clash with one

another. Until TV Pink was recently sold to the foreign-held TV Nova, Montenegrin authorities used it as a propaganda weapon against private anti-government and pro-opposition media. These heated political and media conflicts further degrade the public discourse and undermine media self-regulation. The influence of political and commercial interests is destroying the Montenegrin media sector by tainting journalistic ethics, lowering professional standards, compromising accountability, and requiring key media managers to constantly calibrate their political or propagandistic line. This dismal scene was punctuated in May by the shooting of Olivera Lakić, an investigative journalist for Vijesti, by still-unknown attackers.

Private media in Montenegro have long been at a severe financial disadvantage compared with public outlets, and they face serious structural impediments to development. National and local public broadcasters receive public money as well as the lion's share of advertising, making it difficult for strapped private media to compete. Montenegro has about 150 media outlets chasing an advertising market that Direct Media Ltd in Podgorica estimates to be worth about €11 million (\$12.5 million).

As a result, Montenegro's private media bleed staff and revenue. Last year, fewer than 2,000 people worked in media — down from about 2,700 in 2016 — at an average salary below the national level. Although numerous training programs exist, mostly offered by foreign donors, practical education for journalists still lags behind the real-world needs of media companies.

Montenegro's media also lack effective advocacy organizations. They have no strong business media association, professional journalist association, or respected media trade union. The country's striking media pluralism has not translated into quality programming, so professional standards continue to sink. These shortcomings hinder the country's democratic aspirations and cloud its prospects for eventual European Union membership.

**OBJECTIVE 1:
FREEDOM OF
SPEECH**

2.61

Media regulations and legal safeguards for freedom of press and speech largely comply with international standards. Montenegrin media legislation features international legal instruments, and the national legal framework is aligned with the European Convention on Human Rights and Fundamental Freedoms. These regulations ensure that decisions and precedents of the European Court for Human Rights are applied in court disputes.

While Montenegro's media laws meet international standards, safeguard press freedom, and pose no obstacle to the development and operation of media, officials inadequately enforce the laws. In the public's view, media might officially be free, but many shirk the responsibility that such freedom confers on them.

Prosecutorial and judicial bodies have requested legal sanctions against some media and journalists in recent years. Charges have included publishing information from investigations and inappropriately criticizing judicial bodies. These cases have not gone far, as civil society and the academic community have protested them as draconian restrictions on coverage of criminal investigations and court processes.

In 2018 two working groups, supported by international experts, analyzed and proposed amendments to the Law on Media and the Law on the National Public Broadcaster. The Law on Media had not been amended since it was passed 16 years ago. The experts agreed that it needed updating to account for the penetration of online media and other digital content as well as to bolster

media self-regulation. On the other hand, parliament passed amendments to the law strengthening the government's influence on RTCG.

Aneta Spaić, a professor of media law, asserted that key media regulations meet international standards for human rights and press freedom and explained that "the problems that are occurring are not related to legal norms, but rather to their enforcement or difference in their interpretation."

Analyst and researcher Duško Vuković held a different view and said that implementation "has a certain level of continuity and sustainability." He did stress that media laws need to incorporate better the views of a broader constituency — presumably representatives of academia and civil society — and promote media literacy.

Jadranka Vojvodić, deputy director of the Agency for Electronic Media, said the Law on Media has firm guarantees in place for freedom of speech. But she asserted that the law should be changed to include detailed regulations on the "responsibility of editors in their media outlets, transparency of media ownership, the issue of financial support to media coming from public funds, [and] the issue of self-regulation and accountability of media for what they publish."

Print media in Montenegro do not need to be licensed, although they must register like any other type of business. On the other hand, electronic media — including television, radio, and online — are licensed by the Agency for Electronic Media. Authorities have never used the licensing requirement to shut down any media outlet, but this system is woefully lacking, according to *Vijesti* journalist Mila Radulović. She said that Montenegro needs a central media registry with full information on ownership.

According to Vuković, the licensing problems do not stop there. Staff appointments at the agency

have become politicized, favoring likely yes-men for the government, he said. Other panelists said that the regulator should do more to level the playing field between electronic media and cable operators, which are licensed by the Agency for Electronic Communications.

In addition, panelists said that the Agency for Electronic Media should pay more regulatory attention to the issue of foreign cable channels broadcasting in the Montenegrin market. These channels are taking advertising revenue away from domestic outlets without paying the taxes in Montenegro that domestic operators must pay.

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With the exception of print media—which is taxed at a VAT rate of seven percent rather than the standard 21 percent — the media industry in Montenegro enjoys no special privileges compared to other industries. In all other aspects, private media companies are subject to the same regulations as all companies. Registering a business is relatively simple, and most private media are limited liability companies, usually with a small group of founders. Media remains a privately held industry, with no media companies issuing public stock. Founders of these media companies tend to be driven by narrow, commercial interests. Media companies themselves

are not generally not granted more tax breaks than other sectors.

Montenegro decriminalized libel in 2011, making it a solely civil matter, and laws protect reporters' sources and the freedom of speech. Most panelists agreed that the authorities have done a poor job of safeguarding media members from physical threats.

The last two decades have seen numerous attacks on journalists, many of which are still unsolved or partially solved. Last year *Vijesti* journalist Olivera Lakić was shot in the leg by a still-unknown assailant, in an attack that was roundly condemned by the government, civil society, the general public, and the European Commission. In late 2017, the Constitutional Court upheld journalist Tufik Softić's complaint that police and prosecutors had not conducted an adequate and timely investigation into two attacks he suffered, including a bombing. In a landmark ruling, the court awarded him €7,000 (\$7,980).

The government's failure to apprehend perpetrators led pro-democracy and human rights groups to propose a new law. The regulation would grant journalists a legal status equivalent to an officer of the state, such as a police officer or judge, thereby legally mandating more severe penalties for their attackers. The proposal was rejected by the authorities. Spaić said, "We should think very carefully and strike a balance between the need to protect journalists and at the same time make them accountable for their reporting. This would mean increased protection but also increased accountability."

The Law on the National Public Broadcaster protects RTCG's independence and leaves it free to develop its own programming. The law also requires that RTCG journalists work in the public interest and without political interference. They cannot be fired or otherwise punished because of their opinions as

long as they act in line with professional standards and station rules.

Those protections were tested in 2018, when the government replaced members of the RTCG Council, in order to secure control of the nine-person body. The council then fired RTCG General Director Andrijana Kadija and TV Director Vladan Mićunović. These dismissals were widely seen as interference by the ruling political parties and a threat to RTCG's independence and professionalism.

In light of that controversy, Vuković called these legal protections a "dead letter on paper." He said the changes to the council and the subsequent firings were done illegally and were "a clear indication that the government does not tolerate editorial independence."

For seven years, libel has not been punishable by imprisonment, but journalists still can be subject to civil proceedings and ordered to pay fines if found guilty. Experts and the general public still debate the wisdom of decriminalization, especially with established democracies (including Austria, Germany, and the United States) still having criminal penalties for libel on the books. Fueled by misinformation and distortion, Montenegrins are increasingly calling for re-criminalization of libel.

Montenegro has an adequate Freedom of Information Act, but it is obeyed selectively. Some national and local agencies are responsive and meet their deadlines for handing over information, while others drag their feet, panelists said.

Access to international and local news and media has long been unhindered, and in this respect Montenegro is an open-media society. The government places no legal or physical limits on the flow of news, and it does not censor media sources. The Montenegrin media space is quite liberal, enabling free access and use of local and foreign sources and information.

In Montenegro, journalists need not be licensed. Media companies set their own standards for recruitment and government rules and officials play no role. The most commonly required credential for an aspiring journalist is a university degree.

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.

**OBJECTIVE 2:
PROFESSIONAL
JOURNALISM**

2.30

As in previous years, 2018 saw no significant improvement in journalists' professional standards, the quality of their reporting, or the reliability of their sources. Panelists said that the fundamental problems are that media reflect the polarized political environment, and they are used to further their owners' financial or political interests. "Media in Montenegro are very much divided between those critical of the authorities and those supporting it," said Milan Radović, a member of the RTCG Council. "In this environment, news on any given event gets spun and politically colored, depending on which media reports it."

The prevailing assessment of the panel was that standards for the quality of reporting, objectivity, and reliability of sources are lacking in Montenegrin media. Those pressures, along with the precarious financial state of most media, often lead journalists to compromise their own credibility. "The capitalist market undermines professional journalism, as media owners use their properties to promote themselves," Vuković said. "Media owners are focused on profit, thus turning journalism into a type of commerce. In this kind of environment, the sense of public interest is lost."

Rajka Raičević, a journalist with the Dan daily tabloid, offered a measured defense of her profession. "I can't talk about other media, but Dan insists that whenever we cover certain topics we try to get positions on both sides of the issue. In our daily, reporters must have at least three sources to confirm the veracity of their reporting."

A code of journalistic ethics was introduced

in Montenegro in 2016. Representatives from the profession's self-regulating body worked with staff from Dan, *Vijesti*, and *Monitor* to draft the code. It states that journalists must work in the public interest and that their credibility relies on their honesty, integrity, and skill. The code meets contemporary standards for fair and credible journalism. The first of its 12 principles states, "The journalist's duty is to honor the truth and persistently seek the truth, always bearing in mind the public's right to know and the human need for fairness and humanity."

However, panelists said the country's media often fall short of those standards. Jadranka Rabrenović, a journalist with the Pobjeda daily newspaper, said that code violators face no penalties. "As a result, we see a serious lack of professionalism in the media sector," she said. "This often happens with electronic media who, without naming the sources, simply repackage the news taken from print media."

Almost all panelists said it will take some time before these professional standards become second nature to Montenegro's media, especially considering that most media have no single body they recognize as the arbiter of standards and professionalism.

Journalists in Montenegro, especially in public media, have long labored under the burden of self-censorship even though the country is a pluralistic democracy. "Self-censorship is present in most of the media for different reasons, but mainly due to political and commercial ones," Rabrenović said. Weak unions and meager bargaining power make the situation worse. Panelists said the issue of self-censorship is often neglected in discussions of the state of Montenegrin media.

Montenegro's media cover all the key events and issues in their country, but that is not the

whole story, according to the panelists. "Generally speaking, we can't have a situation when some key event that is of public interest gets ignored, but often the same event is portrayed differently by different media," Vuković said. Radulović said the selective reporting happens especially with security-related news. Each outlet's angle on a particular story is usually dictated by its editorial policies and by its owner's political and business interests.

Print and electronic media both report on all relevant events. In recent years, online journalism through social networks (YouTube, Facebook, Twitter, and Instagram) has made a strong showing.

**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).

In general, journalists' salaries in Montenegro remain stuck below the national average, and those working for major private media do make more than their counterparts at other outlets. Predrag Zečević, editor-in-chief of the Analitika

news website, said meager salaries are pushing journalists into other professions and are making it difficult to attract young people with university degrees into the media sector. Although journalists have long been poorly paid, the ballooning number of outlets and the consequent decline in quality over the past decade have exacerbated the problem of depressed wages and have discouraged entry into the field. Given this vicious cycle and the current economic trends, standards are not likely to improve.

“Media in Montenegro are very much divided between those critical of the authorities and those supporting it,” said Milan Radović.

Montenegro’s long political and social transition included the commercialization of the media industry. The result is dominance of more lucrative fare — such as entertainment, musical, and sports programs — to the detriment of news and educational cultural shows. Some private media, such as TV Pink, rely heavily on entertainment programs, which often are vulgar and banal. Other private media — including Vijesti TV and the Vijesti, Dan, and Monitor publications — focus on news. Prva TV, Antena M, and Pobjeda frequently spotlight identity issues and attempt to demythologize foreign nationalistic and hegemonic forces that seek to influence Montenegrin society. RTCG is a news leader and often produces quality cultural programs as well as documentaries.

The digitalization of media in Montenegro is entering its final stage. Influential nationwide TV stations are going digital, and therefore traditional TV and radio broadcasters have upgraded their technical infrastructure. RTCG has announced an €11 million (\$12.5 million) public tender for the

procurement of equipment for digitalization.

With all media connected to the Internet, journalists suffer no limitations on online information-gathering or communications. Technical capacities and equipment for collection, production, and distribution of news are in good shape at most of the leading media. In recent years media companies have invested significant funds in modernizing their services.

Aside from RTCG, most media outlets still lack the budget, staff, or expertise to conduct specialized or investigative reporting. Vijesti TV, Antena M, Pobjeda, and Dan undertake this reporting to some extent. “I think that in this respect, the best situation is at RTCG, because our television channel has an investigative editorial team that has already won significant awards both in the region and Europe,” Radović said.

Developing and training specialized and investigative reporting teams will be a long, expensive process for Montenegro’s cash-strapped media, panelists said, but it is key to boosting the profession’s reputation and credibility.

OBJECTIVE 3: PLURALITY OF NEWS

2.67

Montenegro has a great variety of media, and the number grows each year. Of the more than 100 outlets registered with the Agency for Electronic Media, 40 are websites, 35 are commercial radio stations, 12 are commercial television stations, 14 are local public radio stations, and four are local public television stations. Print media statistics are unreliable, but for years Montenegro has had four national dailies (Vijesti, Dan, Pobjeda, and Dnevne

Novine) as well as one political weekly (Monitor).

Print media circulation continued to decline in 2018 while website traffic grew. The major news websites, Vijesti, CDM, Analitika, and Antena M, draw more than 200,000 registered visitors per day combined.

The number and types of media give residents of Montenegro a real choice. Further, all the websites are optimized for mobile phones, helping them to extend their reach. However, media variety has not translated to media quality, especially considering that only a handful of media have the staff, expertise, and technical resources to produce their own news or to partner with international media. “People can get information from various sources, but that doesn’t guarantee the reliability of that information,” Radulović said.

Rabrenović said that given the differing viewpoints in Montenegro’s various media, “whoever wishes to have an overview of the entire political situation should be reading all four dailies and watch the news programs of different television stations.” She also expressed skepticism of news found on social networks.

Montenegrins have no legal and very few technical obstacles in getting information electronically from domestic or foreign media. Consumers can choose their own Internet service providers and cable operators, which have networks covering about 90 percent of the country. Cable television costs a household about €12 to €15 (\$13 to \$17) per month and has largely replaced satellite television. Unlimited Internet access costs about €22 (\$25) per month.

The government places no legal or administrative barriers to using the Internet or any social media networks. Consumers enjoy unfettered access to foreign news via their cable packages or the

Internet, and the country's power supply is mostly uninterrupted and does not impede access. The illiteracy rate, about 1.5 percent of the population, is negligible.

The panelists overwhelmingly agreed that public media at all levels are under pressure from those in power, as they rely on national and local budgets for funding. "The content of public media depends on who exactly has the political majority in public media management bodies," Rabrenović said. "This goes equally for the national public service, RTCG, and local public services that are under control of local authorities." She conceded that "public media broadcast programs of public interest," but so do commercial outlets — especially if they receive public funds to do so, she said.

Raičević underscored that "there is an inseparable link between the authorities and RTCG management." This perception was reinforced last year when the RTCG Council dismissed RTCG's top managers over a disagreement on editorial policy. Raičević praised a proposal, currently under debate, which would split the RTCG Council into two bodies that handle oversight and programming separately.

Montenegro's media outlets tend to use news agencies less than in previous years. The country's sole news agency, MINA, has little influence on the market. Only the more dominant and financially stable media buy from regional and global agencies. Raičević said that agencies have lost ground to news websites and posts on social networks — although the questionable information on social networks is no substitute for news from a reputable agency, she said.

All the major commercial television and radio stations try to produce their own news programs, but few are successful and some lack the capacity to do it well. The Vijesti and Prva TV channels have their own news operations, along with news

radio Antena M. Vojvodić said that usually radio stations do not produce their own news and instead broadcast news from other sources. She confirmed that most commercial television stations with national reach produce their own news but said that often the aired content is not high quality. Local broadcasters are far less likely to produce their own news. Social network posters and bloggers produce their own types of news, with much of it unreliable, according to the panelists.

All companies, including media, must register with the Central Registry of Companies. The registry website provides the public with basic information about company ownership structures, but many media observers suspect that those named in media company filings are not the real owners.

The panelists were somewhat split on this issue. Radulović said, "There's no transparency of ownership of media companies, because most true owners are hidden behind proxies — although official data on ownership do exist, and they're even posted on competent bodies' websites." Spaić said that the current system ensures transparency but is not perfect and has room for improvement. She suggested establishing "a unique national registry of all media companies; a registry that would cover all the media —[broadcast], print, and online."

The government's anti-trust watchdog has never identified a case of improper concentration of media ownership, according to the panelists.

Most panelists agreed that Montenegro's media do not reflect society's full spectrum: ethnic minorities, civil society movements, and vulnerable populations, encompassing people with disabilities, the elderly, the LGBTQ community, and the chronically ill. The panelists acknowledged that public broadcasters still aim to be open to different segments of society, regardless of pressure from the ruling parties. For example, RTCG has broadcasted

programming in the Albanian language for several years, and recently, in the Romani language. In addition, some private media — including Antena M radio and the Vijesti, Prva, Teuta, and Boin television channels — produce content for social minorities. Boin in Tuzi, and Teuta in Ulcinja, both located near the Albanian border, lead the way among commercial stations in offering Albanian-language programming.

But Boin TV's Sandra Bojaj said that local broadcasters' precarious economic situations threaten these services. "Local media are experiencing financial sustainability issues. The same applies to our TV station, which broadcasts its entire programming in the Albanian language. The

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.
- ▶ A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.
- ▶ State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- ▶ Broadcast ratings, circulation figures, and Internet statistics are reliable.
- ▶ Independent news agencies gather and distribute news for print and broadcast media.

dwindling advertising market threatens the viability of media. That's why I think that media broadcasting in minority languages should receive some state support."

As it happens, lawmakers have proposed changes to the Law on Media that would introduce a "pluralism fund" to help Montenegro's strained media serve local markets and minority communities. The fund would finance media that broadcast programs in the Albanian and Romani languages, provided certain conditions are met. However, the panelists raised questions about the independence of media that would receive funds, and whether the country could develop a pluralistic and competitive democracy with such media.

Rabrenović said, "whoever wishes to have an overview of the entire political situation should be reading all four dailies and watch the news programs of different television stations."

Most Montenegrin media broadcast news of local, regional, and international importance. The public is not deprived of information on events happening within Montenegro or on the international stage. Strong media pluralism, online journalism, and social networks all contribute to broad accessibility of various domestic and foreign information sources.

OBJECTIVE 4: BUSINESS MANAGEMENT

2.19

Most of Montenegro's numerous media outlets struggle to survive financially. The country has one media outlet per 5,000 people and

an advertising market worth about €11 million (\$12.5 million) annually. Public media are the exception. Radović said that RTCG is financially stable, thanks to an annual appropriation of €14 million (\$16 million) from the national budget. With 750 employees, it has the largest staff of any Montenegrin media outlet. On the other hand, he said, RTCG earns only about €500,000 (\$570,000) in advertising revenue annually.

According to Vuković, Montenegrin media outlets manage to survive— not due to their success in attracting commercial income, but because of other sources of funding, including domestic and foreign grants, recapitalizations, or loans from their owners. But Samir Rastoder, editor-in-chief of the local Radio Petnjica, said that most often these types of help go to major national media, leaving regional media "on the brink of collapse." Ivana Jabucanin, editor-in-chief of RTV Cetinje, said her town of Cetinje is too small to produce sufficient advertising income to support a broadcaster, so her outlet looks to foreign donors. She said RTV Cetinje recently received funds from USAID and Internews to launch some projects, such as launching a mobile phone application/platform where all local radio stations will have a presence.

Local and foreign advertising agencies operate in Montenegro. But given the market size, they tend to be branch offices of multinational agencies. They also do not offer all services, such as research and analytics projects, that are available in bigger markets. Dragan Markešić, manager of the leading Direct Media advertising agency, said that Montenegro has too many agencies for such a small market. The biggest advertisers are telecommunications companies, he said, and described the remainder of the sector as made up by traditional advertising, along with, "a lot of money...spent on

small ads, administrative notifications, congratulations, obituaries, etc."

For years, the value of Montenegro's commercial advertising market has been stuck at €11 million (\$12.5 million) annually. Panelists said that media have no accurate data on the volume of the advertising market that is controlled by national and local governments, but estimates from Direct Media Ltd put it at €2 million (\$2.3 million). Authorities mainly purchase notices and advertisements, amid suspicions that they use their advertising funds to create a de facto pro-government media sector and to punish critical outlets.

Buys from advertising agencies account for more than two-thirds of the market, with a small fraction made up of direct contracts between advertisers and media companies. Private media face unfair competition from public outlets, who

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.

vie for advertising while also securing money from public budgets.

Advertising revenues alone cannot ensure the viability of Montenegro's media. TV stations take more than 50 percent of this revenue, street advertising gets some 25 percent, online advertising slightly more than 10 percent, and the rest goes to print and smaller media. As in previous years, according to Direct Media Ltd Montenegro accounts for less than 2 percent of southeastern Europe's roughly €700 million (\$798 million) advertising market. "We can assume that advertisers put pressure on media to get bigger advertising space at lower costs," Markešić said. "Media are forced to rely more on selling advertising space because alternative sources of funding are drying up. And on top of that, there are no subscriptions to stabilize media companies' budgets."

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As in previous years, the Montenegrin market lacks credible, openly available public opinion surveys or audience research. Most media cannot afford to conduct rigorous surveys and therefore base their business plans on inadequate research on the state of the market.

Reliable data on TV ratings or print media circulation are scarce in Montenegro. As

transparent public relations exercises, media companies occasionally publish the favorable results of a survey. Most media observers are skeptical of these surveys, which are conducted both internally and by external agencies.

Markešić said that for the past three years, Montenegro's television ratings have been measured using a system akin to people meters. "It's a kind of hybrid system, cross-matching daily surveys that provide demographic data on the audience with ratings data of certain programs and TV channels, which are constantly being read from IPTV set-top boxes of Montenegrin Telekom. This way of measuring ratings represents a huge step forward from everything that was done so far." The cable operator does not release this information publicly.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

2.46

The media have made little effort to build strong business associations. The electronic media interest groups Association of Commercial Electronic Media (AKEM) and Association of Independent Electronic Media (UNEM) generally are moribund. Interest in print media associations is waning as well. This indifference is a perennial problem and one of the key reasons media hold little business or professional standing in Montenegro.

Montenegro has three professional journalists' associations. The strongest is the Journalists Trade Union, which has some projects supported by the Council of Europe. However, journalist associations have failed to attract the majority of their

constituency, thus limiting their scopes of activity. Furthermore, these associations rarely make public statements, so the general public has little idea of what journalists are doing to protect their own rights and interests — among them the promotion of quality journalism.

Beginning journalists are prevented from developing the right skills and knowledge because educational institutions lack hands-on training and are poorly linked to the media community.

Panelists said that NGOs have been important partners in the fight for democratic development, a free press, media pluralism, and journalist professionalism. Since Montenegro began its political transition to a democratic pluralistic society, more than 5,000 NGOs have registered, making Montenegrin civil society one of the most influential in this part of Europe. The country has enduring and credible NGOs, including the Center for Democratic Transition, Center for Civic Education, Center for Democracy and Human Rights, Center for Monitoring and Research, Network for the Affirmation of NGO Sector, Institute Alternativa, Gradjanska Alijansa, and Fund for Active Citizenship. They have fostered close relationships with the media and helped initiate public debate on social issues. Over the past two decades, Montenegro's media and NGOs have taken on joint projects in the areas of democracy, human rights, and press freedom.

Panelists said that journalism education remains inadequate. Although Montenegro has private universities with programs related to media, such as the Faculty of Political Sciences' journalism department, training is largely theoretical. Beginning journalists

are prevented from developing the right skills and knowledge because educational institutions lack hands-on training and are poorly linked to the media community.

As a result, bigger media companies organize their own hands-on training. The Montenegro Media Institute, traditionally a key player in the practical training of journalists, recently stepped up its activities. International donors also try to bolster journalism training, but their efforts cannot reverse the cumulative, perennial, and systemic deficits in this area. The panelists stressed that the answer lies in close cooperation among academic institutions, media training centers, and media companies to design quality programs for young journalists and journalism students.

Media outlets that have the wherewithal to do so offer short training courses, usually funded by reputable international organizations, such as the European Union, Council of Europe, U.S. government, or Organization for Security and Co-operation in Europe. These courses allow staff to upgrade professional skills and acquire up-to-date technical capabilities.

Montenegro's print and electronic media do not face obstacles in acquiring the material and equipment necessary to operate. Panelists reported no recorded cases of private printing shops refusing to work with any print media.

Media distribution channels remain apolitical and unhindered by monopolies. Access to mobile and cable networks is unrestricted and is regulated by the Agency for Electronic Communications and Postal Services. This year saw no recorded cases of institutional restrictions or intentional transmission disruptions by the government.

Montenegro mostly keeps pace with international technological standards, so every year brings further development of information and

communications infrastructure. The media sector is in its final stage of digitalization; Internet services are faster and more widespread; cable television reaches more than 90 percent of households; and mobile telephony is ubiquitous and advancing constantly, with four mobile and fixed line telephony operators. These advances and the fierce competition among telephone and cable operators have helped narrow the digital divide between urban and rural areas and have contributed to the widespread penetration of social networks.

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.

List of Panel Participants

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Jadranka Rabrenović, journalist, *Pobjeda*, Podgorica

Milan Radović, member, RTCG Council, Podgorica

Mila Radulović, journalist, *Vijesti*, Podgorica

Rajka Raičević, journalist, Dan, Podgorica

Samir Rastoder, editor-in-chief, Radio Petnjica, Petnjica

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

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