

Media Landscape of South East Europe
2002

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The book presents the results of a survey conducted in 2003 by ACCESS-Sofia Foundation, Bulgaria, in eleven countries in South East Europe: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Hungary, Macedonia, Moldova, Montenegro, Romania, Serbia, and Slovenia.

The methodology of the survey was developed by ACCESS-Sofia Foundation. The relevant survey instruments were also elaborated by ACCESS-Sofia, with the kind assistance of Poul Erik Nielsen, Aarhus University, Danish School of Journalism.

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ACCESS-Sofia Foundation

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ACCESS-Sofia Foundation
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Introduction

Having followed the media in South Eastern Europe in the past ten years, I have not come across any publication that is as rich in facts and figures as this book. Take the chapter on Albania, which says that there are 18 daily newspapers in the country. Sounds good. It even makes you think that Albania has a very lively, diverse, and viable press market. But read a bit further on and you start to wonder: diverse all right, but viable?

Those 18 newspapers together sell less than 60,000 copies daily, to an audience of over three million. In other words: Only one out of fifty Albanians buy a newspaper per day. Most are sold in the main cities and hardly reach the countryside. The largest selling daily, *Gazeta Shqiptare*, has a circulation of merely 9,000. Compare that to Serbia, where one out of ten people buy a newspaper every day and the largest selling newspaper has a circulation of 230,000.

Another example. Bosnia-Herzegovina has 151 radio stations. Quite a lot. But only the top five radio stations have an audience share above two percent. Another 15 stations score between one and two percent, and the remaining 131 stations have such a small audience that it cannot be reliably measured. Moreover, of the total advertising revenue in Bosnia-Herzegovina, only an estimated six percent is spent on radio.

Many media outlets may seem an indication of a plural and viable market. Yet supplemented with all the other information in this publication, it becomes clear that in fact the media landscape has by no means stabilized. Many outlets are small and reach only a limited audience, if measurable at all. They are struggling to survive on an increasingly competitive market.

Media Landscapes in the SEE Region is a broadly set up exercise to map the media in South Eastern Europe in its entirety by combining both quantitative and qualitative information. It offers an insight into the media landscape per country and enables comparisons between countries.

It must have been a difficult exercise: Figures on media outlets, circulation, market share and ownership are hard to come by, let alone that they are hardly comparable from country to country. For example, even though this

publication attempts to shed light on the division of advertising expenditure, the answers in most cases are *Not Available*. Official statistics are sometimes outdated and inaccurate. Corporate information is regularly inaccessible and might be manipulated. And media research centres usually do not have the capacity to conduct surveys, certainly not on a regional level.

This is where the South Eastern European Network for the Professionalization of the Media comes in (SEENPM – they admit the name is somewhat unpractical and long). The network is comprised of media centres from all over the region and can therefore handle research on such a scale. SEENPM has used the strength of its network to prepare this publication, the first of its kind.

Besides facts and figures, the reports provide short to-the-point narrative information on key issues like libel laws and broadcast regulation. Great care was taken to develop a methodology that allows for comparisons and consistency between countries. The organization responsible for coordinating the research and preparing the publication, ACCESS in Sofia, should be highly credited for that.

So, what does this book tell us? The quantitative data show in particular the enormous variety of media outlets. Dozens of newspapers and magazines, hundreds of radio and television stations have been established in the past few years. No longer is the broadcast sector in South Eastern Europe dominated by a single state-owned television channel. Every country has one or more nationwide commercial television channels, most often more popular than the public broadcaster. Admittedly, many provide predominantly entertainment but several larger, private television stations produce news and information programmes as well.

The same applies to radio. Commercial stations combine news and music to compete with the traditionally dominant public broadcasters. More particular for radio is the high number of stations that target a specific audience; either by broadcasting in minority languages, playing distinctive music or focusing on a local community. It all does justice to the diverse nature of the region.

Official state-run newspapers have all but disap-

peared and private newspapers dominate the market. New newspapers still enter the already crowded market. In several countries political parties continue to have their "own" paper. Is that bad? Not necessarily. The partisan press is not dominant, can be balanced by non-aligned newspapers, and the audience has a choice.

Weeklies and periodicals, especially the special-interest ones, have mushroomed and become more attractive. Not only is there a domestic *Cosmopolitan* or *Playboy* in most countries, but there are also high-brow political weeklies and magazines aimed at minorities.

All this is quite positive and indicates significant improvement. But the sunny picture also has a dark shadow over it, as is evident from the narrative parts in the country reports as well as from other reports about the media in South Eastern Europe.

As an outsider, I have to base my judgment of journalistic professionalism on second-hand information. But complaints about the low standards and lack of respect for journalistic ethics are numerous and consistent.

The usual reaction of international organizations is: training. Hence, in the past ten years there has been an abundance of training. From basic journalism courses to mid-career seminars to trainings on specialized reporting, like economics or organized crime. Short-term and long-term. In-house, abroad, regionally. Conducted by numerous foreign and, more recently, domestic organizations. Some journalists have started to get annoyed, others have complained about being trained to death. Some have made good use of the opportunity, others have seen it as a good opportunity for shopping.

All the training has probably helped to raise awareness of standards, but training could not and cannot resolve underlying – more structural – problems affecting the media in South Eastern Europe.

Of the many outlets, far fewer are sustainable and genuinely independent. The advertising market is small, the spending power of the population is relatively low, and the costs are high. The number of outlets depending on donations from the business or political elite is still significant. This impacts on editorial freedom as money usually comes with strings attached.

Add to that the relatively weak position of journalists vis-à-vis media owners. Many, if not most, journalists work without proper contracts. Unions are fairly weak, perhaps with the exception of Croatia. Salaries have improved somewhat in the past years, but are still low (from •66 in Moldova to •340 in Bosnia-Herzegovina). Consequently, talented people often leave the profession for a

better paid job in another sector. The young staff lacks institutional memory and does not always feel in a position to oppose influence on editorial policy.

The lack of resources impacts on the quality in another way, too. Few newspapers can afford to allow a journalist to work on an investigative story for a couple of weeks, even though this may very well be needed to uncover something. The pressure in newsrooms is high, the need to produce words to fill pages is tremendous, and the time to check is limited. Broadcasters usually have inadequate resources for the production of domestic programmes. Sure, talk shows are cheap. But documentaries, investigative news or drama are not.

Besides the lack of resources, there is still some outside pressure. Direct governmental influence has largely disappeared. Yet journalists in local media outlets still practice self-censorship from time to time, to avoid running into trouble with mayors or local businessmen. And for reporters working on corruption or organized crime the pressure comes from a different and occasionally rather threatening source.

To make things worse, there is another structural problem: media legislation. Progress is sometimes remarkably limited. I clearly remember visiting Bulgaria in 1997. Although my assignment was to research the feasibility for media assistance, I was overloaded with ongoing discussions on the broadcast law. It had to be changed, a new draft was being prepared, and lobbying was needed to convince the parliament. Today, media professionals in Bulgaria are still discussing broadcast legislation. It has to be changed, a new draft is being prepared, and lobbying is needed to convince the parliament.

Most countries in the region have similar problems. The independence of the regulatory body is a constant concern, as is the transparency of the licensing process. The transformation of former state broadcasters into genuinely independent public broadcasters is a demanding and difficult process. It involves firing people while improving programmes at the same time. And it requires strong will to keep politicians away, while being dependent on a license fee and/or state subsidies.

Other laws impact more directly on journalists, in particular civil and criminal laws dealing with libel. In some countries, the legislation may have improved – for example in Bosnia-Herzegovina, Romania, Bulgaria, and Croatia. But defamation is still in most cases a criminal offence. Fines can be forbiddingly high. The defence of good faith is regularly not accepted. Politicians sometimes enjoy special protection, even though this contradicts jurisprudence from the European Court of Human Rights.

Of course, it could be argued that libel is in the French criminal code too. Or that the UK only accepts a defence of good faith if it is considered really reasonable. And that fines are high in the Netherlands as well. But in South Eastern Europe, the trend is to sue journalists. Or to quote the report on Macedonia: "It is fashionable to bring criminal charges against journalists." The trend is confirmed by sad figures: Hundreds of cases against journalists are filed (in Croatia 540, in Serbia 300) or still pending. Some claimants may just like the financial compensation, others may want to silence the media. The effect is the same.

Apparently there is a lot to complain about. Is it really all due to lack of money, unpleasant owners, bad laws, and a hostile outside world? Or do journalists perhaps bear some responsibility themselves? Sure they do, and many excellent journalists in South Eastern Europe gladly take that responsibility and provide thorough, balanced, and fact-based reporting. Some, however, do not respect the codes of their profession.

The reports in this publication note that some countries have a handful of ethical codes, developed by various organizations. Some of these organizations represent a significant number of journalists, others merely pretend to. The codes usually contain carefully phrased obligations of journalists. But the reports note "a lack of commitment to the codes." In other words: Nobody gives a damn.

In a very positive mood, I could argue that journalists don't care much about the ethics because there is no properly working self-regulatory mechanism to increase or uphold standards. This is a lame excuse of course – a good journalist lives by unwritten rules – but it would be better if a corrective mechanism did exist. Initiated by the

media professionals themselves, voluntary and respected, and commissioned to keep an eye on some basic professional standards.

Take a quick look at the media landscape in South Eastern Europe, described so thoroughly in this book, and you cannot help being ambiguous. I started this introduction positively, by describing the high variety of media outlets and the many choices available nowadays. But I got gloomier when it came to financial independence, resources, quality, and legislation.

What will the future bring? Most certainly smaller media outlets will have to close or merge or they will be bought by bigger ones. That is not necessarily negative, and it may even improve quality. Concentration of ownership, including foreign ownership, will continue. Again, this is not a problem *per se*, yet it will be if too many outlets are concentrated in too few hands. That could impact on the diversity and the possibility for new media to enter the market.

Some trends can already be deduced from this publication. The figures indicate that a few leading commercial stations – focused on entertainment, with a lot of foreign programmes and some domestic production – will dominate alongside a (constantly debated) public broadcaster. The low circulation of some newspapers and the strong position of others point to a consolidation which will result in some high-circulation tabloids and several lower-circulation broadsheets. Internet penetration is rising and interest in news – particularly among young people – is diminishing. In other words and for better or worse: The media in South Eastern Europe increasingly look like the media in Western Europe.

Yasha Lange,
Media Task Force
Stability Pact for South Eastern Europe

November 2003

Media Landscape of South East Europe: a Snapshot of Troubled Waters

On the Project

The *Media Landscape* project was designed to identify basic parameters of the media scene in South East Europe on a comparative basis. This faced the research team with a series of challenges related both to the conceptual framework and practical implementation of the Project.

The first question that arises here is what is the exact meaning of “media scene.” Many people will assume that the answer to this question is self-evident simply because “media scene” seems a term that is easy to define. In fact, however, it is not. Numbers, names, figures, data, and the like – all these elements could at best describe a particular picture, but it is arguable whether this is actually a picture of the media scene in its entirety.

We could assume that the content of the term includes accumulated reliable knowledge about basic parameters of the regional media scene involving comparable data and evaluation. Yet this raises the question of defining “basic parameters,” a term that is itself subjective in meaning. Its usage presumes a certain common understanding of which parameters can be considered basic; still, readers’ expectations about the nature of the respective “basic parameters” may differ substantially.

“Basic parameters” may also be defined by means of concrete examples/items. For the purposes of our survey we assumed that survey data and evaluations should help understand the main media developments in the countries of the region. Hence, we decided that the figures/items should reveal the whole step by step: numbers of objects; description of objects through quantitative systematization (e.g. by size, type, specificity, similarities and uniqueness, etc.); description of objects through qualitative parameters; evaluation of objects; evaluation of the whole.

Following this scheme, we proceeded to assume responsibility for the selection of areas, items and topics, for the levels of selection and the way this selection was made. Here the risks of a pioneering effort such as the survey in question are most obvious, and our particular selection could no doubt be easily questioned.

At least, however, we followed a clear and consis-

tent pattern in selecting the items: we aimed at tracking the complicated chain of media-society relations. For example, from the title to the owner, the price (against average salary, i.e. average criteria of living standards), the audience (circulation data against population number, literacy level) – adding information about credibility, regulation, independence, journalists’ behaviour, etc. We are well aware that such an ambitious aim is difficult to achieve, but we believe that readers should know the leading principle that guided us in our undertaking.

The second question refers to credibility of data. This is one of the most difficult and crucial questions in any survey, but we must admit that the actual situation fell short even of our most pessimistic expectations. On a scene where dailies’ circulation is a state or trade secret; where ten different sources offer ten different figures on daily circulation (to say nothing of what the editors themselves claim) – on such a scene we tried to rank dailies by circulation. On a scene where TV or radio piracy until recently was or still remains an issue, we tried to figure out the number of broadcasters.

In short, on a scene where an Auditing Bureau does not exist or exists *pro forma* only; where national statistics and state bodies use different methodologies; where access to data is itself a slow and painful process... On such a scene there is only a limited number of options of obtaining data. This survey relied on the contributors, media centres from different countries, which gathered data from different sources and were allowed to estimate within reasonable limits. Thus two layers of credibility were established: the primary local source (e.g. state media commission, opinion poll agency); and selection for credibility by the local media centre.

Such an option certainly cannot solve the question of credibility of data. But a closer look at the explanatory texts about data concerning the media scene will show that this option is not as unreasonable as it might appear at first glance.

The third question refers to comparability. It must be noted that a basic requirement of the survey methodology was to present a regional perspective rather than individual media communities in each country. Thus we had to find a common denominator, based on the idea that the selection of the presented topics should be char-

acteristic, representative and emblematic of the regional media scene – and, on the other hand, that it should enable comparison of the results, i.e. comparability and compatibility.

In an effort to find such a common denominator we introduced the Country Profiles, designed to help the reader to use and interpret absolute figures through the prism of different perceptions (e.g. per capita, per income, etc.). We tried also to use the basic denominators of similar surveys conducted in Europe. Our purpose was to design a questionnaire using terms applicable in all of the surveyed countries. Our initial set of questions went through a selection process aimed at eliminating any irrelevant questions. As a result, we believe that we have achieved results which can be used in a comparative analysis. If the reader finds that in some cases our initial assumptions failed (e.g. in presenting languages of the media), we have good grounds to believe that we did our best and that “non-comparability” stems from the regional peculiarities themselves.

The fourth question refers to understanding data. Since every reader would look for data with the idea of interpreting them, this question is a major challenge. Things in South East Europe do not seem so obvious and easy to understand as in the EU countries, and the way from the data themselves to the relevant conclusions might prove longer. From an outside perspective – say, from the point of view of an American researcher – the South East European countries might seem blended into a single whole (the term “emerging democracies” is readily at hand for such blending purposes).

In fact, however, the South East European media landscape offers a vast panorama of specific features, of virtually innumerable individual peculiarities. By rule, an informed outsider could rely on a set of available deductions on the issue, deductions based on common knowledge or common sense. Such deductions the informed outsider derives from basic parameters of market economy, functioning democracy, or established practices checked by trial and error. It is precisely those parameters that can misguide the outsider. Thus, the reader could be misled to draw false conclusions, since his/her deductions on what the data actually mean might prove irrelevant or wrong.

In this context, we did our best to help the reader proceed from description to understanding. We tried to provide an important missing link for understanding – namely, the reason why. It is exactly for this reason that we included an extensive explanatory section in the survey. Hopefully, these texts will help the reader understand why things are what they are.

On the Outcome

If properly understood, the above explanations will help the reader move on to the next question: What does the survey reveal or contribute to?

It would be appropriate to leave the answer to this question to the reader. However, in a pioneering effort such as the present survey, we have a right to address such a question ourselves – for the purpose not of claiming achievements, but of justifying the initial aims of the project itself.

- We believe that the results presented here are a successful attempt at scratching the surface of an enormous mix of problems related to the media in the SEE region. There are quantitative data on basic parameters of print and electronic media. There are also data on the media environment, which are necessary for presenting the picture of the regional media landscape in adequate colours. Even if some of the colours are missing (as is the case with media economy or media human resources), we still have good grounds to believe that the black-and-white parameters are reasonably clear.

- We believe that we have presented in an adequate way a region with substantial differences in media landscape details. It has long been known that this region unites countries with a markedly uneven level of media development. On the other hand, we have proven that despite all differences the countries in the region have a lot in common (problems with access to data, electronic media regulation, public trust in the media, media independence, unclear media economy parameters, and so on).

- Also, we have identified some clearer parameters of knowledge. Such a conclusion might seem ridiculous to an academic. Yet in the context of a pioneering effort, such a result may be defined as essential. We know – more or less – what is known and, more important, what remains unknown at present. This will help identify areas for future research.

In fact, the survey has confirmed some important hypotheses about the regional media landscape. In the last ten years we have witnessed a lot of research efforts on the media in the region: studies, books, contributions. Now we are able to see that a global view of media developments in the region is hardly possible, because even basic data are obscured by the fog of non-available information, newly adopted and not always properly implemented legislation, etc.

- The results offer an additional insight into the painful relations of the media with the State.

On the one hand, state domination in the media field is now a thing of the past and this is demonstrated unambiguously by the growing competition on the print and electronic media market.

On the other hand, it seems that in some areas there is much more order than there used to be just a few years ago. Procedures for registration of electronic media have been established and it seems that the long period of electronic media piracy is coming to an end. A couple of years ago in many countries it was impossible to identify the main agents in the media field.

(It seems also that other agents have assumed this controlling role, and that only a single battle has been won in the war for media independence. A scene dominated by professional, independent and responsible media is a goal that is yet to be achieved. As to the newly emerging challenges, the reader will discover a series of similarities in the explanatory part describing the media as a corrective of government, media regulation and codes of ethics...)

- The reader is strongly advised to consider the notes and comments supplementing the data. In many cases these notes and comments do not merely elaborate on the data but indicate the “resistance” of regional media landscapes against classification under a common denominator. The reader will probably note a tendency to stress on the peculiarities and uniqueness of the respective media landscape. The methodological approach of the survey encouraged such comments since they can balance the “forced introduction” of parameters for the purpose of comparability. It is not that these notes are irrelevant. On the contrary. Unlike many similar surveys, the notes here are an extremely useful instrument for understanding data and for drawing conclusions. In some cases the notes and comments seem more instructive and telling than the data themselves.

- This Project is designed to target a specific audience (consumer group). This is the “foreign” reader – an expert community “foreign” to the regional scene as well as readers from the SEE countries who might be “insiders” but are nevertheless foreign to the regional perspective.

To this audience the book offers a rare opportunity to measure and adjust existing ideas to reality in the region. Many members of this expert community have had and still have rather confused ideas about the regional media landscape as a whole. This fact has sparked many futile debates among media analysts, academics, NGO experts, editors and journalists, opinion makers, businesspersons interested in the media market and advertising, trainers, political scientists, etc.

From this perspective, the survey results are a valuable reference point. The dangerous play with numbers and approximations, which has been part of expert games in countless seminars, meetings and conferences, will now have to be checked against a new source.

- Also, we believe the Project results reveal the level of available public information about the media realm as such. It should be noted explicitly that data collection under the Project did not envisage special investigation or research on the surveyed topics. The contributors used public sources of information. True, if specific research had been undertaken, the data and information in several areas could have been different (e.g. media ownership, media economy, media legislation, media staff numbers, etc.). However, special and extensive investigation was not the purpose of the survey. Any reader surprised by the amount of N/A's should bear in mind the objective limitations in the format of the survey.

After establishing the level of available public information, we have reasonable grounds to presume that specific efforts aimed at identifying particular features of SEE media landscapes would be better targeted and more properly applied in the future. At least, this survey draws a clear distinction between the level of facts (information, data available) and the level of rumours (that is, what are widely believed to be facts). Access to media databases has to be improved and extended in the future, but the survey can definitely serve as a starting point. It might be useful to speculate on future developments on the regional media market, for instance, but for this purpose it is much better to have at least the number of media and basic data on circulation...

As regards the level of available public information, the survey shows an amazing discrepancy between the speed of media development in the region and the amount of available information about the regional media landscape. It is not enough to conclude that we know what is known and what is yet unknown. Now it seems that the sheer volume and areas of what remains unknown are too dangerous and might easily lead to dangerous results also – for future projects in the media field, for training in journalist policies, for forecasting and strategy-building. We are late already, and the regional media landscape urgently needs a whole set of projects and efforts aimed at filling in the “blanks” on the map of South East Europe.

- The regional media landscape also urgently needs a common methodology for collection and analysis of relevant data. Despite the enormous efforts to introduce common denominators for the purpose of comparability, the survey offers a vast amount of exceptions, of specific, peculiar and “exotic” features. Admittedly, part of

the reasons for that might be attributed to faults in the survey methodology, which failed to identify “average” and fully comparable parameters applicable to all media landscapes. Yet most of the reasons are related to the different systems and schemes of data collection applied in the different countries. National statistics offer non-comparable data (if they offer any data at all); local surveys are not conducted from a regional perspective; bodies such as an Auditing Bureau of Circulation are either non-existent or do not cover comparable areas of the media landscape; data from government and other sources (independent, business, NGO, etc.) on one and the same topic differ substantially...

The least-effort strategy (wait-and-see option) relies on the European integration process, which is expected to result (eventually) in the adoption of some universal “*acquis mediatraire*” akin to the *acquis communautaire*. Which would naturally lead to comparability by the pure logic of regional development. And indeed, once reached, this would enable easy comparisons of all the basic media parameters in Bosnia and Herzegovina, Macedonia, Bulgaria or Moldova with the respective parameters in Ireland, France, Norway or Austria.

Yet for the moment we are not only far from this level but, moreover, waiting does not seem the appropriate option at all. After all, it is exactly for the purpose of regional development that this common methodology is needed, and relying on “natural evolution” to solve the problem is the same as assuming that development does not require conscious effort and participation.

Hence the results of this survey have led us to the conclusion that there is an urgent need of conscious efforts: elaborating parameters, conducting regional projects for comparable results, deliberately seeking comparability and learning from the experience of others.

On the Reader’s Expectations

It would be easy to produce a long list of objective reasons explaining any shortcomings in the survey (rapid media evolution in the region since 1990; the fact that many of the countries themselves are still in a process of painful transformation, etc.). A comparative description of the media landscape in, say, Bosnia and Herzegovina, Albania, Hungary or Moldova seems an easy task only if viewed from a distance.

Such reasons will not be discussed here. However, it would be fair to point out some inner shortcomings of the survey – for the purpose of adjusting the reader’s possible expectations of such a survey to the actual picture presented here.

Firstly, constructing an adequate picture of the media landscape in the region had to be achieved by means of comparison – at that, comparison leading to instructive results. This picture therefore required combining quantitative and qualitative information, applying descriptive, explanatory and case-study approaches for different segments of the survey. Such a concept produced a result that might seem somewhat eclectic in the context of similar surveys conducted in EU countries.

Secondly, media landscape data are relevant only if properly time-oriented. The participants in this survey were asked to submit data for 2002 (the Explanatory Information part allows a broader time limit). However, 2002 data coming from reliable sources could not be easily obtained. (In many cases, such data could not be obtained even from the national statistical offices, which usually release information about a particular year at least a year later. The “speed” at which, say, Bulgaria’s National Statistical Institute operates would definitely seem absurd to someone from Ireland or Belgium.) According to the initial survey design, when data for 2002 were not available the contributors were expected to submit data for 2001 or 2000 (in several cases even such data were not available). Of course, in the Media Data part all data that refer to years other than 2002 are explicitly indicated as such. The problem, however, comes from the rapid development of the media landscapes in the region. By 2003, data for 2001 are no longer representative; data for 2000 are hopelessly outdated and could hardly serve as a basis for comparison. (The figures on radio stations and TV channels, print media circulation, Internet penetration, the most basic parameters imaginable – all these seem so totally changed in two years that such a comparison could prove useless or misleading.) Bearing in mind all this, the reader should be extremely cautious in interpreting the data.

Thirdly, it must be noted that this survey was a collective effort. The responsibility for data, for comments and evaluations was shared by a team of contributors, since we assumed that national experts and national experts only could identify properly the specific features of the local media landscape, analyze the underlying reasons, and adequately present them to an outside reader. The contributing media centres were chosen both for their abilities to collect the required data in the respective country and the existing local expertise on media issues. However, some discrepancies inevitably follow from the wide variety of contributors.

(Such discrepancies are quite indicative. If a country contributor tends to use “newspaper” as a synonym of “daily” and “magazine” as a synonym of “weekly,” this could also be indicative of particular tendencies in print media development.)

Fourthly, comparability was achieved at the cost of forcefully introduced parameters, since no preliminary surveys or research on similarities and/or differences of the media landscapes in the region were available or possible. Thus, local contributors were hard pressed in their effort to adapt the local media landscape to a set of requirements that might seem artificially created and alien to the respective media landscape.

Whatever the shortcomings of this book might be, they should be evaluated carefully against the back-

ground of specific technical, local, conceptual, financial and other considerations. Against such a background, we have good grounds to believe that the results of the survey presented here could serve as a useful guide, a reference source, a policy-making tool for the expert community and media professionals; that they could contribute to the professionalization of the media communities in the countries of the region and provide a model for assessing the regional media landscapes in future.

Roumen Yanovski,
ACCESS-Sofia Foundation

Media Data

- Data not indicated by the contributor

N/A Data not available

[] Estimated data

* Editor's note

Long numbers are presented in the text in groups of three digits, separated by a comma according to the prevalent English language convention (e.g. 1,000,000); in the tables, they are separated by a fixed space (1 000 000).

Due to the huge amount of notes, the notes to the tables are numbered by country.

Symbols

Survey outline: Roumen Yanovski

Data processing: Veneta Litkova, Paulina Taneva, Yordanka Kachakova

General Information on the Media

The survey covers the media landscape in two separate sections devoted to different, specific subject fields. The first part, “Media Data” (e.g. general information), aims at offering representative quantitative data about the media landscape in the respective country.

Information for this part was gathered using a variety of sources. Preference was given to official data, but national statistics, governmental and other sources, were not expected to provide all the answers. If no official data were available, credible data were offered from unofficial sources (see “On the Survey Guidelines”). Judging the “credibility” of data was left at the discretion of the local contributor – since a local expert only is capable of evaluating data in such terms, taking into account the quality of the respective source, possible verification by cross-checking, overall probability of data, etc. In a few cases only the editor has commented on the data offered by local contributors.

The quantitative data were expected to refer to 2002. If no data for 2002 were available, the contributors were asked to provide the corresponding data for 2001 (clearly indicated as referring to 2001 in the Notes).

Estimates are given in square brackets: for example, “circulation [120 000]”; the decision on estimation was left at the discretion of the local contributor. Estimates by rule contradict some ideas of correctness and accuracy, involving approximations and judgment. Estimates, however, seem to be of significant value in comparing media landscapes, and were judged to be preferable to the N/A’s that would otherwise have prevailed in several

sections of the survey. Either way, whatever the reader might think about the credibility of estimation, such data are clearly identified as estimates.

Contributors were encouraged to offer comments and notes on quantitative data and information – we believed this would help the reader by reducing possible inconsistencies that might stem from local peculiarities. The abundance of comments might seem surprising, but there was also another reason to include them here. The data presented were gathered by means of a questionnaire based on numerous assumptions. (When dealing with TV, for instance, it was assumed that there are registered broadcasters, and also licensing procedures.) If the local media scene goes against these assumptions, this fact surfaces in the notes and comments.

The reader who might object to the way the data are presented should bear in mind the vast amount of data offered here. In some cases presentation through cross-tabulations could have been detrimental to the comprehensiveness of the survey. In other cases comparability could be achieved through juxtaposition only. There are also a lot of opportunities that could be further applied on the basis of the data presented here (e.g. additional operations if the reader is interested in per capita figures; adding or subtracting numbers according to literacy levels indicated, etc.).

It might prove useful for the reader to refer to the section “On the Survey Guidelines” if in doubt how to interpret the data offered, e.g. on the meaning of the terms used.

Country Profile 2002

	Albania	Bosnia and Herzegovina ¹	Bulgaria	Croatia	Hungary
Country population	3 069 300 ¹	3 821 397 ²	7 845 499	4 437 460	10 152 000
Average age of population	29 ²	[34] ³	40.6	39.3	39.6
Urban/rural distribution (%)	45/55 ³	56.2/43.8 ⁴	69.6/30.4	N/A	65/35
Capital city, population	Tirana 519 720	Sarajevo 297 399	Sofia 1 194 164	Zagreb 779 145	Budapest 1 725 000
Population of the three biggest cities (capital excluded)	Elbasan 221 365 Fier 199 082 Shkoder 185 395	Banja Luka 221 727 Tuzla 221 785 Zenica 128 311	Plovdiv 712 707 Varna 460 001 Bourgas 421 049	Split 188 694 Rijeka 144 043 Osijek 114 616	Debrecen 206 000 Miskolc 180 000 Szeged 163 000
Official language/s	Albanian	Bosnian, Serbian, Croatian	Bulgarian	Croatian	Hungarian
Main ethnic groups (% of population)	Albanian 95 Greek 3 Other 2 (Macedonian, Vlah, Roma, etc.)	Bosniak 44 Serb 31 Croat 17	Bulgarian 83.94 ¹ Turkish 9.42 ¹ Roma 4.68 ¹	Croats 89.63 Serbs 4.54 Bosnians 0.47	Hungarian 92.3 ¹ Roma 1.9 ¹ German 0.6 ¹ Slovakian 0.17 ¹
Education (% of population)					
1. University degree	4.3	6.4 ⁵	13.38	7.4	12 ²
2. Secondary school	19.4	32.6 ⁵	36.03	40.2	27.9 ²
3. Primary school	34.3	24.4 ⁵	26.13	13.8	60.1 ²
Illiteracy rate (% of population)	1.4	5.4	2 ²	1.77	[1] ³
Average salary (per month) (EUR)	103	337.45 ⁶	139	516	504
Average salary in media sector (EUR)	N/A	[337.45] ⁷	[250]	N/A	602 ⁴
GDP per capita (EUR)	1 247	1 404	2 100	4 853	6 876
Inflation rate 2002 (Dec. to Dec.; %)	2.1	[3.5]	3.8 ³	[2.3] ¹	8.7
Exchange rate of the national currency against EUR (As of 31.12. 2002)	136.87	1.95583	1.95583	7.44	235.90
Shadow economy (Estimated as % of GDP)	N/A	N/A	[30] ⁴	[12] ¹	[21] ⁵

Country Profile 2002

Macedonia	Moldov a	Montenegro	Romania	Serbia	Slovenia
2 049 000 ¹	4 247 700 ¹	[662 195] ¹	21 680 974	7 478 820 ¹	1 964 036
N/A	[33.5] ²	34.96 ²	37.3	40.2	39.5
60/40	45.3/54.7	58.2/41.8 ³	52.7/47.3	39.2/41.6	50.8/49.2
Skopje 422 368 ²	Chisinau 779 000	Podgorica [176 360] ⁴	Bucharest 1 926 334	Belgrade 1 574 050	Ljubljana 265 881
Kumanovo 94 589	Tiraspol 205 000 ³	Niksic [80 355] ⁵	Iasi 320 888	Novi Sad [298 139]	Maribor 110 668
Bitola 86 176	Balti 151 000 ³	Bijelo Polje [58 650] ⁵	Cluj-Napoca	Niš [250 180]	Kranj 51 225
Tetovo 65 318	Tighina 141 000 ³	Pljevlja [40 300] ⁵	317 953	Kragujevac [175 182]	Celje 48 081
			Timisoara 317 660		
Macedonian	Romanian ⁴	Serbian ⁶	Romanian	Serbian ² , Albanian ² , Hungarian ²	Slovenian
Macedonians 66.6	Moldovans (Ro- manians) 64.5 ⁵	Montenegrins 61.87 ⁷	Romanian 89.5	Serbs 66 ¹	Slovenian 83.06
Albanians 22.7	Ukrainians 13.8 ⁵	Muslims 14.57 ⁷	Hungarian 6.6	Albanians 17 ¹	Serbian 1.98
Other 10.7 (Turks 4.0; Roma 2.2; Serbs 2.1; Vlachs 0.4; etc.)	Russians 13.0 ⁵	Serbs 9.34 ⁷	Roma 2.5 ¹	Hungarians 3.2 ¹	Croatian 1.81
		Albanians 6.58 ⁷			
9	9.7 ⁶	6.61 ⁸	7 ²	11	13.0 ¹
32	33.4 ⁶	26.13 ⁸	64.2 ²	41.1	54.1
33	15.9 ⁶	22.03 ⁸	25.6 ^{2,3}	40.1	26.1
N/A	3.6 ⁷	9.4 ⁹	2.6 ²	5.7	1 ²
193	46.25	118.57 ¹⁰	123	136	1 063.23 ³
N/A	[65]	N/A	N/A ⁴	[250] ³	N/A
1 683	[372]	[1 600] ¹¹	2 108	1 831	11 709
2.2	4.4	9.4	17.8	14.8	7.2
61.2	14.4	1.00 ¹²	34 918	61.5	230.27
40	[40]	N/A	N/A	28	N/A

Albania

Notes:

¹ In 2001.

² In 1999.

³ In 2001.

Sources:

Statistical Yearbook 1993-2001 INSTAT

Official website of the Ministry of Foreign Affairs www.mfa.gov.al

Bosnia and Herzegovina

Notes:

¹ From December 1995 when the Dayton Peace Agreement was signed, Bosnia and Herzegovina consists of two entities: the Federation of Bosnia and Herzegovina (51%), dominated by Bosniaks and Croats; Republika Srpska (49%), dominated by Serbs; and the internationally supervised Brčko District, an administrative unit under the sovereignty of Bosnia and Herzegovina. The Federation of Bosnia and Herzegovina consists of 10 cantons, and Republika Srpska of 6 regions.

² 30 June 2002.

³ Male: 33 years, female: 35 years. Census 1991.

⁴ Census 1991.

⁵ Census 1991.

⁶ Gross 337.45; Net 228.04.

⁷ Gross 337.45; Net 228.04.

Sources:

Agency for Statistics of Bosnia and Herzegovina

Bulgaria

Notes:

¹ In 2001.

² Source: NEST Association.

³ According to the National Statistical Institute; 5.8% according to the IMF

⁴ According to the Bulgarian National Bank; the World Bank estimate is 35-37%.

Sources:

National Statistical Institute

Bulgarian National Bank

Croatia

Notes:

¹ According to the Institute for Public Finances.

Sources:

Statistical Yearbook of the Republic of Croatia, 2002.

Hungary

Notes:

¹ National Census (1 February 2001), KSH (Central Statistical Office).

² Of the population aged over seven: National Census (1 February 2001), KSH (Central Statistical Office).

³ There are no official data, but the president of the Pécs University of Sciences has estimated the illiteracy rate at 1% of the adult population, and the functional illiteracy rate at around 6% to 7% (*Népszabadság*, 29 May 2000).

⁴ Data based on monthly gross salaries of editors and journalists in print and electronic media: State Employment Office, 2002.

⁵ Estimate, 2001: Hungarian Academy of Sciences, Study by TÁRKI Research Institute, Budapest

Sources:

Yearbook of Statistics, KSH (Central Statistical Office), 2003

Macedonia

Notes:

¹ By 31 December 2002.

² In 1994.

Sources:

State Statistical Office

Moldova

Notes:

¹ Estimated in the 2002 Yearbook (published by the Department of Statistics), since the last census was conducted in 1989. Moreover, Chisinau authorities have no control over the breakaway region of Transnistria, east of the Nistru river, and hence there is no access to data regarding that region (however, the population estimate is for the entire country). Therefore, most of the data and explanations in this survey exclude Transnistria.

² 32 years (males), 35.2 years (females). Data for early 2001. *The Republic of Moldova in Figures, 2002: Short Statistical Book*, Department of Statistics and Sociology, 2002 (Bilingual: Romanian/English).

³ 1991 Yearbook (Department of Statistics).

⁴ The name of the language is controversial (mostly for political reasons associated with the identification of Moldovans either as a separate ethnicity or as Romanians living in the Republic of Moldova): the Constitution of the Republic of Moldova stipulates that the official language is Moldovan, but the term "Romanian language" is normally used in everyday speech. As this is a politically sensitive issue among different segments of the population (the academic community tends to refer to the language spoken in Moldova as Romanian), politicians are more inclined to refer to the "official language."

⁵ 2002 Yearbook, based on the 1989 census.

⁶ 1991 Yearbook, based on the 1989 census.

⁷ Calculated on the basis of the adult literacy rate of 96.4%, shown in the *Moldova National Human Development Report, 2000*, published by the UNDP.

Montenegro

Notes:

¹ Estimation for 2002 (the last census, conducted in 1991, showed 615,035).

² In 1999.

³ In 1991.

⁴ Estimation for June 2002.

⁵ Estimation for June 2002.

⁶ The official language in Montenegro is "Serbian" (Constitution of Montenegro, Article 9). Recently, there have been some disputes on the official name of the language between those who consider that it should be called "Montenegrin" and those who insist that it should keep its present name ("Serbian"). However, advocates of both views agree that from a linguistic standpoint this is one and the same language. As it does not want to play the role of arbiter in this particular case, the Montenegro Media Institute has taken a neutral position, using the constitutional name of the language and giving others the opportunity to decide how they will refer to their language in future.

⁷ In 1991.

⁸ In 1991.

⁹ Excluding refugees (Source: Poverty Reduction Strategy Paper).

¹⁰ In June 2002.

¹¹ Approximation (Source: Commercial Chamber of Montenegro, www.pkcg.org).

¹² The Euro is the official currency.

Sources:

Statistical Yearbook 2002, December 2002, Podgorica, Republic Statistical Department

Romania

Notes:

¹ Official sources underestimate the size of the Roma population. Unofficial sources put their share of the total population at approximately 8%-9%.

² Percentage of population aged 10+.

³ "Primary school" and "less than primary education."

⁴ Official data are not available; according to unofficial sources, it is approximately at the average national salary level.

Sources:

Census of Population and Dwellings, March 18 – 27, 2002, National Institute of Statistics, www.insse.ro

The data on average salary, GDP per capita, inflation rate and exchange rate are from the official statistical report of the National Bank of Romania, www.bnr.ro

A group of experts estimated the average salary in the media sector for the Media Sustainability Index / Romanian section, 2002, International Research & Exchanges Board, <http://www.irex.org/msi/2002/country/Romania.pdf>

Serbia

Notes:

¹ The data on country population and ethnic groups include Kosovo, based on official estimates. The other data on Serbia do not include this province.

² Serbian is the official language on the entire territory of Serbia, except Kosovo, whereas Albanian and Hungarian are used officially along with Serbian only on territories where there is an Albanian or a Hungarian majority – namely, parts of South Serbia and Vojvodina respectively.

³ The figure for average salary is a rough estimate, since official data are unavailable. Until July 2003 most journalists and other media staff, especially those working for private media, were, so to speak, "moonlighters" since their employers paid them only fees but not the relevant state taxes or health and retirement insurance contributions. A survey conducted by the Strategic Marketing and Media Research Institute and the Independent Journalists' Association of Serbia in 2002, revealed that 37% of the journalists earned less than EUR 200 per month, 21% less than EUR 100, and 4% over EUR 400.

Sources:

Republic Bureau of Statistics

Strategic Marketing and Media Research Institute

Independent Journalists' Association of Serbia

Institute G 17 Plus

Government of the Republic of Serbia

Serbian Chamber of Commerce

Slovenia

Notes:

¹ 5.1% two-year study course; 7.9% four-year study course.

² Less than 1%.

³ 1,063.23 (gross); 666.37 (net).

Sources:

www.stat.si/popis2002/si

Nateh, Karel. *Države sveta 2000*. 1999. Ljubljana: Založba mladinska knjiga

I. Print Media

I. 1. Print media circulation

I. 1. 1. Circulation of newspapers

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Total number of newspapers	[95]	[74] ¹	401	169	1 911	19	43	19	52 ¹	[132]	N/A
daily newspapers	[18]	8	59	11	41	11	2	6	39	15	6
weekly newspapers	[37]	[12] ¹	150	39	270	5	30	7	12	49	4
newspapers published less than once a week	[40]	[55] ¹	192	119	1 600	3	11	6	0	68	N/A
Single circulation of newspapers (thousands)	[511.2] ¹	N/A	3 462.5	N/A	13 765	N/A	224,025	163.6	1 253 ²	[1 284.3]	N/A
daily newspapers	[62] ²	[104] ¹	852.6	N/A	1 665	[153.98]	18.45	101.5	1 021	[732]	N/A
weekly newspapers	[116] ³	[96] ¹	1 927.9	N/A	7 300	N/A	185.29	31.6	232	[326.4]	N/A
newspapers published less than once a week	[36.4] ⁴	[275] ¹	682.0	N/A	4 800	N/A	20.285	30.5	0	[225.9]	N/A
Annual circulation of newspapers (thousands)	[326 445] ⁵	N/A	358 423.6	N/A	922 700	N/A	14 950,220	[38 977.7]	N/A	[281 941.2]	N/A
daily newspapers	[20 011] ⁶	[37 960] ¹	251 343.3	N/A	499 500	[1 847.76]*	3 837.6	[36 540.0]	N/A	[263 520]	N/A
weekly newspapers	[5 334] ⁷	[4 992] ¹	90 833.3	N/A	380 000	N/A	10 711.48	[1 644.7]	N/A	[15 667.2]	N/A
newspapers published less than once a week	[301 100] ⁸	[4 675] ¹	16 247.0	N/A	43 200	N/A	401.14	[793.0]	N/A	[2 754]	N/A
Average price of single issue of newspapers (EUR)	[0.24]	N/A	0.15	N/A	N/A	0.20	N/A	N/A	N/A	[0.4]	N/A
Average price of single issue of daily newspapers (EUR)	[0.22]	[0.85] ¹	0.20	0.80	0.34	0.16	0.05	0.30	[0.11] ³	[0.3]	0.7
Average price of single issue of weekly newspapers (EUR)	[0.24]	[1.25] ¹	0.12	1.80	N/A	0.22	0.1	N/A	[0.22] ⁴	[0.5]	0.7
Average price of single issue of newspapers published less than once a week (EUR)	[0.2]	[1.25] ¹	0.10	3.00	N/A	0.21	0.1	N/A	N/A	[0.5]	N/A

I. 1. 2. Circulation of magazines

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Total number of magazines	[68]	[152] ¹	449	N/A	1700	70	15	61	82 ¹	77	322
weekly magazines	[11]	[19] ¹	18	N/A	250	N/A	0	0	23	15	33
magazines published less than once a week	[57]	[133] ¹	431	N/A	1 450	N/A	15	61	59	62	289
Single circulation of magazines (thousands)	[152.9] ⁹	N/A	1 313.5	N/A	11 625	N/A	30.45	108.17	3 155 ²	[934]	N/A
weekly magazines	[25.3] ¹⁰	[190] ¹	152.7	N/A	7 125	N/A	0	0	1 005	[803]	N/A
magazines published less than once a week	[127.6] ¹¹	[798] ¹	1 160.8	N/A	4 500	N/A	30.45	108.17	2 150	[1 506]	N/A
Annual circulation of magazines (thousands)	[2 683] ¹²	N/A	15 137.7	N/A	396 500	N/A	341.4	N/A	N/A	[60 882]	N/A
weekly magazines	[1 315.6] ¹³	[9 880] ¹	5 914.7	N/A	356 000	N/A	0	0	N/A	[38 544]	N/A
magazines published less than once a week	[1 367.6] ¹⁴	[13 566] ¹	9 223.0	N/A	40 500	N/A	341.4	N/A	N/A	[22 338]	N/A
Average price of single issue of magazines (EUR)	[2.1]	N/A	0.50	N/A	N/A	N/A	N/A	N/A	N/A	[1.3]	N/A
Average price of single issue of weekly magazines (EUR)	[1]	[2.4] ¹	1.00	N/A	N/A	N/A	0	0	N/A	[1.3]	1.5
Average price of single issue of magazines published less than once a week (EUR)	[2.98]	[2.4] ¹	0.45	N/A	N/A	N/A	0.7	N/A	N/A	[1.3]	2.5

Albania

Notes:

Official data on the number of publications in the country, their circulation, staff, or related economic matters are either unavailable, or not accessible. The data used in this survey originate from *Monitoring Albanian Media Landscape 2002*, a report published by the Albanian Media Institute; therefore the data refer only to the monitored subjects and depend entirely on them for the reliability and truthfulness of the information.

¹ (409.8 on newsstands, 93.5 by subscription)

² (56 on newsstands, 6 by subscription)

³ (67.5 on newsstands, 40.8 by subscription)

⁴ (32.4 on newsstands, 4 by subscription)

⁵ (273 396 on newsstands, 53 by subscription)

⁶ (19 011 on newsstands, 1 000 by subscription)

⁷ (4 285 on newsstands, 1 049 by subscription)

⁸ (51 by subscription, 250 100 on newsstands)

⁹ (130.5 on newsstands, 22.4 by subscription)

¹⁰ (20.7 on newsstands, 4.5 by subscription)

¹¹ (109.7 on newsstands, 17.8 by subscription)

¹² (2 258 on newsstands, 425 by subscription)

¹³ (1 080 on newsstands, 41.5 by subscription)

¹⁴ (190 by subscription, 1 177.6 on newsstands)

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

According to the database of the Press Council of Bosnia and Herzegovina, there are 226 registered print media published in Bosnia and Herzegovina. There are 147 in the Federation of Bosnia and Herzegovina and 79 in Republika Srpska.

There are additional lists of print media registered in the Federation of Bosnia and Herzegovina (201) and Republika Srpska (125), but the information about them could not be double-checked. In the majority of cases, the newsrooms could not be contacted at the given contact addresses/numbers.

Data on the type of publication and circulation were not available for all publications in the database of the Press Council of Bosnia and Herzegovina.

"Published less than once a week" category includes biweekly, monthly, and other less frequent periodicals.

Sources:

Press Council of Bosnia and Herzegovina - www.vzs.ba (Print Media in Bosnia and Herzegovina)

¹ Media Plan Institute

Bulgaria

Notes:

Data on newspapers are for 2002; data on magazines are for 2001.

Sources:

National Statistical Institute

Croatia

Notes:

Data on circulation are not available.

Sources:

CJA – Croatian Journalists' Association

Hungary

Sources:

Szonda-Ipsos – Media and Market Research Institute

Macedonia

Notes:

The circulation estimates are deduced from annual media research.

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

*Editor's note:

This figure (1 847.76) seems hardly comparable with the single circulation of dailies offered (153.98) and most probably is not correctly estimated.

Moldova

Notes:

The survey assumes that there is a dominant (official) language in a given country, and that the bulk of the national press is in that language. In Moldova, however, there are two equally functioning languages (Romanian and Russian) although only one of them (Romanian, or Moldovan according to the Constitution) is the official language. Hence, the Russian-language media are as significant and as popular (in some cases even more so) as the Romanian-language ones. Therefore, Section I.4. presents the first ten Russian-language publications ranked by single circulation, as required by the methodology of this survey. The other sections on print media describe Romanian-language publications only unless indicated otherwise.

Also, bilingual publications are indicated in two ways in the *Media Guide* (see Sources): specifying that a publication is bilingual but providing only one subscription code, or specifying that a publication is bilingual but providing two subscription codes – one for each language (i.e. there are two language versions of the same publication and a separate subscription can be taken out to each version). In the first case, the working assumption is that a publication contains both languages in one issue, and is ranked under section I.5.; in the second case, the two versions are treated as separate publications, and the Romanian-language version is ranked under sections I.1., I.2., I.3., I.4. and the Russian-language version under section I.5.

Since no global statistics exist for print media, the main source of information used in the questionnaire is *Media Guide 2002*, published by the Independent Journalism Center (an NGO). This is a revised version of the 2001-2002 edition, with the information rechecked and extended. Hence one can assume that it offers a solid degree of reliability. However, it may not include absolutely all publications (as it was composed piecemeal, in the same way that the present statistics were compiled). It must be noted that the global statistics presented here have been computed from many small pieces of information, which results in an approximation with a wide margin of error, but which nevertheless offers some idea of the print media landscape in Moldova in the absence of official statistics or audited figures. (It is interesting to note that official statistics do not offer figures on, or even mention the media as a sector of the economy, society, education, etc. This domain is completely absent from the official global view of the country.)

Sources:

Media Guide 2002 (bilingual Romanian/English, revised edition, Independent Journalism Center, Chisinau). Also, some data not available in the *Media Guide* have been taken from the information provided by the publishers in the masthead of each periodical as required by the Press Law.

Montenegro

Notes:

The annual circulation figures are estimates. Data on the average price of weeklies and magazines are not available. The total figure on magazines includes periodical magazines, advertising magazines, newsletters, etc.

Sources:

Montenegro Media Book, Montenegro Media Institute, July 2002 (circulation figures collected directly from publishers statements, there is no Bureau of Circulation in Montenegro).
Broadcasting Agency Register

Romania

Notes:

¹ Publications registered by the Audit Bureau of Circulations – BRAT (www.brat.ro). BRAT represents the national circulation-measuring system. There are other publications, which are not registered by BRAT, and their circulation is unknown.

² Data for sold copies. Calculated after BRAT's statistics, average number of copies sold in July-December 2002.

³ Approximately ROL 5,000.

⁴ Approximately ROL 10,000.

Sources:

Audit Bureau of Circulations – BRAT (www.brat.ro)

Serbia

Notes:

Data for Serbia excluding Kosovo.

The Serbian media scene boasts an inordinately high number of national dailies, weeklies and magazines. Still more numerous are local print media, printed in up to 2,000 copies and often even much less. They are economically unviable. Furthermore, accurate records do not exist despite regular efforts to make an updated list of all print media at least once a year. The failure of such efforts is partly due to the frequent termination or start-up of print media outlets.

The table does not include licensed magazines which are only translated into the Serbian language and, although with a high print run, do not have journalistic content. The same applies to those with cookery recipes, instructions for handicrafts, catalogues of cars, equipment, etc., or those which offer ads only.

Sources:

Strategic Marketing and Media Research Institute

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Media Register, Serbian Government

Slovenia

Sources:

www.gov.si/ma/slo/kajsedogaja/mediji.html

National Research of Readership 2003, data for second half of 2002 (www.nrb.info/podatki/2002-2.html)

I. 2. Top ten dailies (e.g. published 4-7 days/week)

Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Albania	<i>Gazeta Shqiptare</i>	Albanian	Newspaper	[9 000]	Edisud, sh.p.a., company[Foreign (Italian) capital]	National
	<i>Koha Jone</i>	Albanian	Newspaper	[8 000]	Nikolle Lesi [person, local]	National
	<i>Korrieri</i>	Albanian	Newspaper	[7 670]	Media 6 [company, local]	National
	<i>Sport Ekspres</i>	Albanian	Newspaper	[6 000]	Nikolle Lesi [person, local]	National
	<i>Republika</i>	Albanian	Newspaper	[5 285]	Republican Party, political party	National
	<i>Zeri i Popullit</i>	Albanian	Newspaper	[5 000]	Socialist Party, political party	National
	<i>Panorama</i>	Albanian	Newspaper	[4 800]	Panorama group, company, local	National
	<i>Rilindja Demokratike</i>	Albanian	Newspaper	[4 170]	Democratic Party, political party	National
	<i>Albania</i>	Albanian	Newspaper	[3 450]	Ylli Rakipi [person, local]	National
	<i>55</i>	Albanian	Newspaper	[3 030]	Fahri Balliu [person, local]	National
Bosnia and Herzegovina	<i>Dnevni avaz</i>	Bosnian	Newspaper	[40 000] ²	Private	National
	<i>Oslobođenje</i>	Bosnian Serbian Croatian	Newspaper	[15 700] ¹	Mixed	National
	<i>Jutarnje novine</i>	Bosnian Serbian Croatian	Newspaper	10 000 ¹	Private	National
	<i>Nezavisne novine</i>	Bosnian Serbian Croatian	Newspaper	7 000 ¹	Private	National
	<i>Glas Srpski</i>	Serbian	Newspaper	7 000 ¹	Public	Regional
	<i>San</i>	Bosnian Serbian Croatian	Newspaper	[5 000] ²	Private	National
	<i>Dnevni list</i>	Croatian	Newspaper	[5 000] ²	Private	Regional
	<i>Oslobođenje RS</i>	Serbian	Newspaper	[5 000] ²	Mixed	Regional
Bulgaria	<i>Dneven Troud</i>	Bulgarian	Newspaper	[180 000]	Private, Germany and Bulgaria, Westdeutsche Allgemeine Zeitung through Media Holding AD	National
	<i>24 Chassa</i>	Bulgarian	Newspaper	[120 000]	Private, Germany and Bulgaria, Westdeutsche Allgemeine Zeitung through 168 Hours Press Group OOD	National

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Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Bulgaria (cont.)	<i>Standart News</i>	Bulgarian	Newspaper	[40 000]	Private, Israel, Standart News OOD	National
	<i>Maritsa</i>	Bulgarian	Newspaper	[35 000]	Private, Hermes Commerce Inform OOD	Regional
	<i>Monitor</i>	Bulgarian	Newspaper	[30 000]	Private, Offshore, Monitor Press Group OOD	National
	<i>7 Dni Sport</i>	Bulgarian	Newspaper	[27 000]	Private, Israel and Bulgaria, 7 Dni Sport OOD	National
	<i>Noshten Troud</i>	Bulgarian	Newspaper	[25 000]	Private, Germany and Bulgaria, Westdeutsche Allgemeine Zeitung through Media Holding AD	National
	<i>Novinar</i>	Bulgarian	Newspaper	[20 000]	Private, Bulgaria, Novinar OOD	National
	<i>Meridian Match</i>	Bulgarian	Newspaper	[18 000]	Private, Bulgaria, Novinar OOD	National
	<i>Sega</i>	Bulgarian	Newspaper	[15 000]	Private, Bulgaria, Sega AD	National
Croatia	<i>Večernji List</i>	Croatian	Newspaper	160 000	Private, STYRIA	National
	<i>Jutarnji List</i>	Croatian	Newspaper	100 000	Private, EPH: NINO PAVIĆ+WAZ	National
	<i>Slobodna Dalmacija</i>	Croatian	Newspaper	64 000	Government-owned	National
	<i>Novi List</i>	Croatian	Newspaper	50 000	Private, NOVI LIST	National
	<i>Sportske Novosti</i>	Croatian	Newspaper	40 000	Private, EPH	National
	<i>Glas Istre</i>	Croatian	Newspaper	18 000	Private, GLAS ISTRE	Regional
	<i>Glas Slavonije</i>	Croatian	Newspaper	12 000	Private, GLAS SLAVO	Regional
	<i>Vjesnik</i>	Croatian	Newspaper	8 000	Governmental TISAK	National
	<i>La Voce del Populo</i>	Italian	Newspaper	2 000	Private, EDIT	Regional
<i>Zadarski List</i>	Croatian	Newspaper	1 500	Private	Regional	
Hungary	<i>Metro</i>	Hungarian	Newspaper	307 208	Private, Modern Times Group (Sweden)	National
	<i>Blikk</i>	Hungarian	Newspaper	203 485	Private, Ringier AG (Switzerland)	National
	<i>Népszabadság</i>	Hungarian	Newspaper	195 167	Private, Ringier AG (Switzerland), Szabad Sajtó Alapítvány (Hungary)	National
	<i>Magyar Nemzet</i>	Hungarian	Newspaper	98 900	Private, Nemzet Lap- és Könyvkiadó Kft (Hungary)	National
	<i>Nemzeti Sport</i>	Hungarian	Newspaper	89 390	Private, Ringier AG (Switzerland)	National
	<i>Kisalföld</i>	Hungarian	Newspaper	78 849	Private, Associated Newspapers (UK)	Regional

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Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Hungary (cont.)	<i>Szines Mai Lap</i>	Hungarian	Newspaper	72 482	Private, Híd Rádió Kft (Hungary)	National
	<i>Zalai Hírlap</i>	Hungarian	Newspaper	58 490	Private, Westdeutsche Allgemeine Zeitung (Germany)	Regional
	<i>Vas Népe</i>	Hungarian	Newspaper	58 295	Private, Westdeutsche Allgemeine Zeitung (Germany)	Regional
	<i>Kelet-Magyarország</i>	Hungarian	Newspaper	57 037	Private, Funk Verlag und Druckerei (Austria)	Regional
Macedonia	<i>Dnevnik</i>	Macedonian	Newspaper	[59 404]	WAZ Media company; foreign – German capital	National
	<i>Vest</i>	Macedonian	Newspaper	[32 110]	WAZ Media company; foreign – German capital	National
	<i>Utrinski vesnik</i>	Macedonian	Newspaper	[20 815]	WAZ Media company; foreign – German capital	National
	<i>Fakti</i>	Albanian	Newspaper	[19 013]	Private publishing company "Erebara"-Skopje	National
	<i>Makedonski sport</i>	Macedonian	Newspaper	[7 658]	N/A	National
	<i>Vecer</i>	Macedonian	Newspaper	[7 460]	Public publishing company "Nova Makedonija"	National
	<i>Flaka</i>	Albanian	Newspaper	[4 888]	Public publishing company "Nova Makedonija"	National
	<i>Nova Makedonija</i>	Macedonian	Newspaper	[1 178]	Public publishing company "Nova Makedonija"	National
	<i>Makedonija Denes</i>	Macedonian	Newspaper	N/A	NIK "MakDen"	National
	<i>Roma Times</i>	Romani	Newspaper	N/A	N/A	Local
Moldova	<i>Flux</i>	Romanian	Newspaper	[10 000]	Private, local, Flux Press Group [sponsored by the Popular Christian Democratic Party]	National
	<i>Moldova Suverana</i>	Romanian	Newspaper	[8 450]	Public, Government of Republic of Moldova	National
Montenegro	<i>Dan</i>	Serbian	Newspaper	30 000	Private, "Jumedia Mont" D.O.O.	National
	<i>Vijesti</i>	Serbian	Newspaper	25 000	Private, D.O.O. Daily press	National
	<i>Pobjeda</i>	Serbian	Newspaper	19 000	Public, public company "Pobjeda"	National

Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Montenegro (cont.)	<i>Publika</i>	Serbian	Newspaper	10 000	Private, "Millenium" D.O.O.	National
	<i>Glas Crnogoraca</i>	Serbian	Newspaper	10 000	Private, Cultural Center "Saint Sava"	National
	<i>Blic Montenegro</i>	Serbian	Newspaper	7 500	Private, "Euroblic Montenegro" D.O.O.	National
Romania	<i>Libertatea</i>	Romanian	Newspaper	173 475	Private, SC <i>Editura Sportrom SRL</i> , owned by Ringier trust, Swiss capital	National
	<i>Adevărul</i>	Romanian	Newspaper	133 220	Private, SC <i>Adevarul SA</i> , Romanian capital	National
	<i>Evenimentul Zilei</i>	Romanian	Newspaper	104 939	Private, <i>Expres SRL</i> , associates: <i>Druck & Verlagshaus Grüner + Jahr AG</i> – 51% (German capital), Romanian individuals: <i>Mihail Carciog</i> – 26.46%, <i>Comel Nistorescu</i> – 22.54%	National
	<i>Romania Libera</i>	Romanian	Newspaper	71 394	Private, SC "R" SA, Shareholders: East European Development Fund (SUA) – 21.6%, <i>WAZ</i> – 35% (foreign capital), Romanian individuals – 43.2%	National
	<i>Pro Sport</i>	Romanian	Newspaper – sport profile	67 150	Private, <i>Pro Sport SA</i> ¹ Shareholders: <i>Media Pro Group SA</i> (American-Romanian partnership) – 56%, Romanian individuals: <i>Vasile Nitescu</i> – 25%, <i>Ovidiu Ioanitoaia</i> – 15%, others	National
	<i>National</i>	Romanian	Newspaper	60 140	Private, <i>National SRL</i> Associates: <i>WAZ</i> – 50% (foreign capital), <i>N&V Press Group SRL</i> (Romanian capital) – 50%	National
	<i>Monitorul</i>	Romanian	Newspaper	46 540	Private, Romanian capital ²	National

Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Romania (cont.)	<i>Ziua</i>	Romanian	Newspaper	38 722	Private, Ziua SRL, Associates (Romanian individuals): Sorin Rosca Stanescu – 16%, Dinu Patriciu – 42%, George Gaita – 42%	National
	<i>Jurnalul Național</i>	Romanian	Newspaper	30 058	Private, Jurnalul SA, Intact Media Trust, Shareholders (Romanian individuals): Dan Voiculescu – 61%, Anca Raluca Gheorghe - 15%, Mihai Lazar – 15%, others	National
	<i>Gazeta de Sud</i>	Romanian	Newspaper	28 980	Private, Romanian capital, George Constantin Paunescu (Romanian businessman), details not available. ³	Regional
Serbia	<i>Večernje novosti</i>	Serbian	Newspaper	[230 000]	Private (local) Kompanija Novosti AD	National
	<i>Blic</i>	Serbian	Newspaper	[150 000]	Private (foreign) Blic Press d.o.o.	National
	<i>Politika</i>	Serbian	Newspaper	[115 000]	Private (mixed) Politika Newspapers&Magazines d.o.o.	National
	<i>Nacional</i>	Serbian	Newspaper	[80 000]	Private (local) NIP INFO Orfej	National
	<i>Novi ekspres</i>	Serbian	Newspaper	[35 000]	Private (mixed) Politika Newspapers&Magazines d.o.o.	National
	<i>Dnevnik</i>	Serbian	Newspaper	[30 000]	Public (local) Dnevnik Holding AD	Regional
	<i>Borba</i>	Serbian	Newspaper	[20 000]	Public (local) Kompanija Borba AD	National
	<i>Danas</i>	Serbian	Newspaper	[20 000]	Private (local) DanGraf	National
<i>Magyar Szo</i>	Hungarian	Newspaper	[13 000]	Public (local) Magyar Szo	Regional	
<i>Privredni pregled</i>	Serbian	Newspaper	[10 000]	Public (local) NIP Privredni pregled	National	
Slovenia	<i>Slovenske novice</i>	Slovenian	Newspaper	105 000	Local	National
	<i>Delo</i>	Slovenian	Newspaper	100 000	Local	National
	<i>Večer</i>	Slovenian	Newspaper	[65 000]	Local	National
	<i>Dnevnik</i>	Slovenian	Newspaper	[58 000]	Local	National
	<i>Ekipa</i>	Slovenian	Newspaper	[20 000]	Local	National
	<i>Finance</i>	Slovenian	Newspaper	[10 000]	Mixed	National

Albania

Notes:

Since the ranking relies on the figures supplied to the AMI by the editors/publishers/directors, whereas several of them refused to provide this information, this ranking might not be a faithful depiction of the real landscape. This also applies to the rankings of print media. For example, according to a media survey on newspaper readership, conducted by the Institute of Surveys and Opinions (ISO), *Shekulli* turned out to be first by number of readers, followed by *Gazeta Shqiptare*, *Koha Jone*, *Sporti Shqiptar*, and *Korrieri*. While this comes closer to the widely accepted truth about the media scene, according to which *Shekulli* has the top circulation, we cannot confirm this information and supply figures, as the directors of the media outlet refused to provide data (and so did other media outlets).

Gazeta Shqiptare runs daily pages on the main cities in the country. Also, *Korrieri* publishes regular, extensive supplements on different issues, although not with an exclusively regional/local focus, apart from running regular pages from one of the districts on a daily basis.

All the ranked newspapers are published six days per week, except Monday.

Sources:

Monitoring Albanian Media Landscape 2002
Media 2002

Bosnia and Herzegovina

Sources:

¹ European Journalism Centre, *The Bosnia-Herzegovina Media Landscape*, November 2002

² Press Clipping, Media Plan Institute Sarajevo

Bulgaria

Sources:

On ownership: media research conducted by ACCESS – Sofia Foundation.

There is no official reliable source on circulation data.

Croatia

Notes:

EPH – Europa Press Holding (WAZ 50% share)

EDIT – private regional investors

TISAK – state-owned firm (publishing and distribution)

Sources:

ICEJ, International Center for Education of Journalists

Hungary

Notes:

The figures on single circulation refer to total distributed copies.

Sources:

MATESZ (Hungarian Audit Bureau of Circulations)

Macedonia

Notes:

The circulation estimates are deduced from annual media research.

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Moldova

Notes:

The diacritical signs in the original titles in Romanian have been omitted here for the sake of convenience. In Romanian it is legible to read without diacritical signs.

Flux: Published four days a week; the Friday edition is larger and is a digest of the other three issues from the same week. The newspaper's masthead shows a weekly circulation of 39,600; the average of 10,000 copies per each of the four issues has been deduced on that basis.

Moldova Suverana: Published four days a week. The *Media Guide* shows a daily circulation of 10,000, while the paper's masthead shows a weekly circulation of 27,612 (or divided by 4 = 6,903 copies per issue). The daily circulation figure of 8,450 used in this survey has been calculated as an average of the two.

Sources:

Media Guide 2002; publishers.

Montenegro

Sources:

Montenegro Media Book, Montenegro Media Institute, July 2002 (circulation figures collected directly from publishers statements, there is no Bureau of Circulation in Montenegro)

Romania

Notes:

All data in "Single circulation" column refer to sold copies (July-December 2002).

All information regarding ownership refers to September 2002.

¹ This newspaper was bought in 2003 by Ringier Romania, Swiss capital.

² *Monitorul* had the biggest circulation at the local level, being a network of local newspapers. The network was broken up in 2002, and local supporters of the government party bought some publications. This caused a public scandal.

³ *Capital* magazine, 10 October 2002, "Stapinii preseii locale" ("The Owners of Local Press").

Sources:

Audit Bureau of Circulations – BRAT (www.brat.ro)

Ownership information is based on *Capital* (economic profile) from September 5, 2002, Media section: "Cine tine painea si cutitul in presa cotidiana centrala" (no English version available), www.capital.ro.

Notes 2 and 3 are based on *Capital*, 10 October 2002: "Stapinii presei locale" ("The Owners of Local Press").

No research or study on media ownership is available.

Serbia

Notes:

Data for Serbia excluding Kosovo.

Circulation is generally given on the basis of the data provided by the print media themselves and estimates of independent sources. Circulation figures often differ from the data on readership obtained in various polls.

Sources:

Media Register, Serbian Government

Strategic Marketing and Media Research Institute

Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Slovenia

Sources:

National Research of Readership 2003, data for second half of 2002 (www.nrb.info/podatki/2002-2.html)

I. 3. Top ten weeklies (e.g. published 1-3 days/week)

Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Albania	<i>Intervista</i>	Albanian	Newspaper	[25 100]	Artan Kristo [local person]	National
	<i>Sport +</i>	Albanian	Newspaper	[7 000]	Eurolloto [company, local]	National
	<i>Kushtrim Brezash</i>	Albanian	Newspaper	[7 000]	War Veteran Organization [organization, local]	National
	<i>Celesi</i>	Albanian	Newspaper	[4 000]	Celesi [local company]	Regional
	<i>Humor dhe Satire</i>	Albanian	Magazine	[4 000]	Humor dhe satire [local company]	National
	<i>Klan</i>	Albanian	Magazine	[4 700]	Media 5 [local company]	National
	<i>Nositi</i>	Albanian	Newspaper	[3 350]	Dija Poradeci [local company]	Regional
	<i>Ushtria</i>	Albanian	Newspaper	[3 200]	Ministry of Defence [government owned]	National
	<i>Vizion rinor</i>	Albanian	Newspaper	[3 000]	Zylyftar Plaku [person, local]	National
	<i>Romiosini</i>	Greek	Newspaper	[2 500]	A.M.I. [company (Greek and local)]	National
Bosnia and Herzegovina	<i>Slobodna Bosna</i>	Bosnian Serbian Croatian	Magazine	28 000 ¹	Private	National
	<i>Dani</i>	Bosnian Serbian Croatian	Magazine	25 500 ¹	Private	National
	<i>Nedjeljne nezavisne novine</i>	Bosnian Serbian Croatian	Magazine	18 000 ¹	Private	National
	<i>Reporter</i>	Serbian	Magazine	10 000 ¹	Private Mr. Perica Vučinić	National
	<i>Ljiljan</i>	Bosnian	Magazine	8 000 ¹	Private	Regional
	<i>Trn</i>	Serbian	Magazine	N/A	Private	National
	<i>Express</i>	Bosnian	Magazine	N/A	Private	National
	<i>Max Magazin</i>	Bosnian	Magazine	N/A	Private	National
	<i>Hercegovačke novine</i>	Croatian	Newspaper	N/A	Private	Regional
	Bulgaria	<i>Treta Vuzrast</i>	Bulgarian	Newspaper	[320 000]	Private, Bulgaria, Treta Vuzrast Publishing House
<i>Doktor</i>		Bulgarian	Newspaper	[175 000]	Private, Bulgaria, Protos Agency	National
<i>Shok</i>		Bulgarian	Newspaper	[140 000]	Private, Bulgaria, Shok Press	National

Country	Name	Language of publication	Type (newspaper/ magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Bulgaria (cont.)	<i>Sedmichen Troud</i>	Bulgarian	Newspaper	[120 000]	Private, Germany and Bulgaria, Westdeutsche Allgemeine Zeitung through Media Holding AD	National
	<i>Lichna Drama</i>	Bulgarian	Newspaper	[95 000]	Private, Bulgaria, Jim G.S.& Co.	National
	<i>Lechitel</i>	Bulgarian	Newspaper	[80 000]	Private, Bulgaria, ABC Company	National
	<i>168 Chassa</i>	Bulgarian	Newspaper	[65 000]	Private, Germany, Westdeutsche Allgemeine Zeitung through 168 Hours Press Group OOD	National
	<i>Durjaven Vestnik</i>	Bulgarian	Newspaper	[45 000]	Public, National Assembly of the Republic of Bulgaria	National
	<i>Blyasuk</i>	Bulgarian	Magazine	[30 000]	Private, Bulgaria, Blyasuk Media OOD	National
	<i>Hai Kloub</i>	Bulgarian	Magazine	[25 000]	Private, Germany, Media EOOD	National
Croatia	<i>Gloria</i>	Croatian	Magazine	120 000	Private, EPH	National
	<i>Globus</i>	Croatian	Magazine	60 000	Private, EPH	National
	<i>Arena</i>	Croatian	Magazine	44 500	Private, EPH	National
	<i>Tena</i>	Croatian	Magazine	42 000	Private, EPH	National
	<i>Nacional</i>	Croatian	Magazine	40 000	Private, NAKLADNIK D.O.O.	National
Hungary	<i>Budapesti Piac</i>	Hungarian	Magazine	812 438	Budapesti Piac Rt. (Hungary)	Local (capital)
	<i>Story</i>	Hungarian	Magazine	399 535	Sanoma Budapest Rt. (Finland)	National
	<i>TVR-Hét</i>	Hungarian	Magazine	316 210	Axel Springer (Germany)	National
	<i>Nők Lapja</i>	Hungarian	Magazine	311 070	Sanoma Budapest Rt. (Finland)	National
	<i>Színes RTV</i>	Hungarian	Magazine	307 438	Sanoma Budapest Rt. (Finland)	National
	<i>Kiskegyed</i>	Hungarian	Magazine	229 468	Axel Springer (Germany)	National
	<i>Vasárnapi Blikk</i>	Hungarian	Newspaper	185 172	Ringier (Switzerland)	National
	<i>Szabad Föld</i>	Hungarian	Newspaper	176 385	Private, Nemzet Lap- és Könyvkiadó Kft (Hungary)	National
	<i>Vasárnap Reggel</i>	Hungarian	Newspaper	169 961	Axel Springer (Germany)	National
<i>Best</i>	Hungarian	Magazine	152 276	Sanoma Budapest Rt. (Finland)	National	
Macedonia	<i>Tea Moderna</i>	Macedonian	Magazine	N/A	Planet press company-Skopje	National

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Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Macedonia	<i>Svedok</i>	Macedonian	Magazine	N/A	SMK-Skopje	National
(cont.)	<i>Oglasnik M</i>	Macedonian	Magazine	N/A	Oglasnik "M"-Skopje	National
	<i>Lobi</i>	Albanian	Magazine	N/A	LOBI-Skopje	National
	<i>Ekran</i>	Macedonian	Magazine	N/A	Public publishing company "Nova Makedonija"	National
	<i>Fokus</i>	Macedonian	Magazine	N/A	D.N.I.D. Fokus Press-Skopje	National
	<i>Nas Svet</i>	Macedonian	Magazine	N/A	Public publishing company "Detska radost"	National
	<i>Start</i>	Macedonian	Magazine	N/A	BRO DOO-Skopje	National
	<i>Denes</i>	Macedonian	Magazine	N/A	NIK "MAKDEN" - Skopje	National
	<i>Aktuel</i>	Macedonian	Magazine	N/A	NIK Press d.o.o.-Skopje	National
	<i>Kapital</i>	Macedonian	Magazine	N/A	T.D. Ekonomist-Skopje	National
Moldova	<i>Timpul</i>	Romanian	Newspaper (1 day/week)	20 000	Private, local, Timpul info-magazin LTD	National
	<i>Literatura si arta</i>	Romanian	Newspaper (1 day/week)	18 230	Local, Union of Writers of Moldova	National
	<i>Saptamina</i>	Romanian	Newspaper (1 day/week)	17 345	Private, local, Saptamina LTD	National
	<i>Democratia</i>	Romanian	Newspaper (1 day/week)	13 350	Local, private, Center for European Education of Republic of Moldova	National
	<i>Luceafarul</i>	Romanian	Newspaper (1 day/week)	11 000	Local, private, Party of Rebirth and Conciliation	National
	<i>Glasul natiunii</i>	Romanian	Newspaper (1 day/week)	10 000	Local, private, Glasul Natiunii LTD	National
	<i>Jurnal de Chisinau</i>	Romanian	Newspaper (1 day/week)	8 900	Local, private [the editor Val Butnaru in partnership with a business person]	National
	<i>Tineretul Moldovei</i>	Romanian	Newspaper (1 day/week)	7 000	Local, private, Tineretul Moldovei LTD	National
	<i>Tara</i>	Romanian	Newspaper (3 days/week)	7 000	Local, private, Christian Democratic Popular Party	National
	<i>Comunistul</i>	Romanian	Newspaper (1 day/week)	7 000	Local, private, Communist Party of Moldova	National
Montenegro	<i>Revija D</i>	Serbian	Newspaper	10 000	Private, "Jumedia Mont"	National D.O.O.
	<i>Monitor</i>	Serbian	Newspaper	8 000	Private, Montenegropublic D.O.O.	National

Media Landscape 2002

Country	Name	Language of publication	Type (newspaper/magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Montenegro (cont.)	<i>Onogošt</i>	Serbian	Newspaper	5 000	Private, "Info press" D.O.O.	National
	<i>Respekt</i>	Serbian	Newspaper	2 500	Private, "Free Montenegro" D.O.O.	National
	<i>Kohajavore</i>	Albanian	Newspaper	2 350	Public, Parliament of Republic of Montenegro	National
	<i>Polis</i>	Serbian	Newspaper	2 280	Parliament of Podgorica Municipality	Local
	<i>Kronika</i>	Albanian	Newspaper	1 500	Private, "Dulcigno-press"	National
Romania	<i>Formula AS</i>	Romanian	Magazine for women	269 220	Private, Romanian capital	National
	<i>TV Mania</i>	Romanian	Magazine, TV guide	146 805	Private, Ringier media trust, Swiss capital	National
	<i>Pro TV Magazin</i>	Romanian	Magazine, TV guide	114 323	Private, Media Pro trust, American-Romanian partnership	National
	<i>Acasa in Bucatarie</i>	Romanian	Magazine, gastronomic profile	74 767	Private, Romanian capital	National
	<i>Agenda</i>	Romanian	Newspaper	73 797	Private, Romanian capital	Regional
	<i>Lumea Femeilor</i>	Romanian	Magazine for women	65 660	Private, Ringier media trust, Swiss capital	National
	<i>Jurnalul de Bucuresti</i>	Romanian	Magazine	52 804	Private, Intact media trust, Romanian capital	Local, Bucharest
	<i>Sapte Seri</i>	Romanian	Magazine, TV and general guide, free distribution	49 910	Private, unknown capital	National
	<i>Story</i>	Romanian	Magazine	49 198	Private, unknown capital	National
	<i>Capital</i>	Romanian	Newspaper, economic profile	44 553	Private, Ringier media trust, Swiss capital	National
Serbia	<i>Svet</i>	Serbian	Magazine	[270 000]	Private (local); Color Media International, Novi Sad	National
	<i>Lisa</i>	Serbian	Magazine	[150 000]	Private (foreign); Hubert Burda Media	National
	<i>Nedeljni Telegraf</i>	Serbian	Newspaper	[80 000]	Private (local); Pharos	National
	<i>Svedok</i>	Serbian	Newspaper	[50 000]	Private (local); Melon d.o.o.	National
	<i>Svet plus</i>	Serbian	Magazine	[45 000]	Private (local); Color Media International, Novi Sad	National

Country	Name	Language of publication	Type (newspaper/ magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Serbia (cont.)	<i>Revija 92</i>	Serbian	Magazine	[38 000]	Private (local); Kompanija Novosti AD	National
	<i>Tempo</i>	Serbian	Magazine	[30 000]	Private (local); Politika AD	National
	<i>Ekonomist</i>	Serbian	Magazine	[30 000]	Private (foreign); E-press d.o.o.	National
	<i>NIN</i>	Serbian	Magazine	[30 000]	Mixed (local); NIN d.o.o.	National
	<i>Ilustrovana politika</i>	Serbian	Magazine	[30 000]	Private (local); Politika AD	National
Slovenia	<i>Nedeljski dnevnik</i>	Slovenian	Magazine	[180 000]	Local	National
	<i>Nedelo</i>	Slovenian	Magazine	[80 000]	Local	National
	<i>Lady</i>	Slovenian	Magazine	[60 000]	Local	National
	<i>Jana</i>	Slovenian	Magazine	[50 000]	Local	National
	<i>Družina</i>	Slovenian	Magazine	[40 000]	Local	National
	<i>Kmečki glas</i>	Slovenian	Magazine	[35 000]	Local	National
	<i>Stop</i>	Slovenian	Magazine	[20 000]	Local	National
	<i>Salomonov oglasnik</i>	Slovenian	Magazine	[20 000]	Local	National
	<i>Hopla</i>	Slovenian	Magazine	[18 000]	Local	National
<i>Mladina</i>	Slovenian	Magazine	[15 000]	Local	National	

Albania*Notes:*

All the publications are weeklies, except for *Sport +* and *Celes*, which are published twice a week.

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina*Sources:*

¹ European Journalism Centre, *The Bosnia-Herzegovina Media Landscape*, November 2002

Bulgaria*Sources:*

On ownership: media research conducted by ACCESS – Sofia Foundation.

There is no official reliable source on circulation data.

Croatia*Sources:*

ICEJ, 2002

Hungary*Notes:*

The figures on single circulation refer to total distributed copies.

Sources:

MATESZ (Hungarian Audit Bureau of Circulations)

Macedonia*Sources:*

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Moldova

Notes:

Luceafarul: The last issue appeared in December 2002.

Tara: Ceased publication as of January 2003.

Publications owned by eponymous limited-liability (LTD) companies are usually ventures started by the editorial staff of the respective newspaper. This, however, does not exclude sponsorship by private business people or political parties, which is usually not acknowledged publicly.

Sources:

Media Guide 2002, publishers.

Montenegro

Sources:

Montenegro Media Book, Montenegro Media Institute, July 2002 (circulation figures collected directly from publishers statements, there is no Bureau of Circulation in Montenegro)

Romania

Notes:

All data in "Single circulation" column refer to sold copies (July-December 2002).

Sources:

Audit Bureau of Circulations (BRAT) – www.brat.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

Circulation is generally given on the basis of the data provided by the print media themselves and estimates of independent sources. Circulation figures frequently differ from the data on readership obtained in various surveys. Names of owners and publishers are often considered a trade secret.

Sources:

Media Register, Serbian Government

Strategic Marketing and Media Research Institute

Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Slovenia

Notes:

All figures on circulation are estimates; official data are not available.

Sources:

www.gov.si/ma/slo/kajsedogaja/mediji.html

National Research of Readership 2003, data for second half of 2002 (www.nrb.info/podatki/2002-2.html)

I. 4. Top ten print media published less than once a week

Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Albania	<i>Rreth e Rrotull</i>	Albanian	Magazine	[12 000]	Albanian Ecological Club [organization, local]	National
	<i>Femra Moderne</i>	Albanian	Magazine	[10 000]	Haxhi Isufi [person, local]	National
	<i>Mrekullia</i>	Albanian	Magazine	[8 000]	Besa Foundation [organization, local]	National
	<i>Jeta</i>	Albanian	Magazine	[7 500]	R&V [company, local]	National
	<i>Ngjallja</i>	Albanian	Newspaper	[4 500]	Albanian Orthodox Church	National
	<i>Flad</i>	Albanian	Magazine	[4 000]	Hasan Gremi [person, local]	National
	<i>Trendy</i>	Albanian	Magazine	[3 100]	Prisma Communication [company, local]	National
	<i>Gazeta e Qarkut Gjirokaster</i>	Albanian	Newspaper	[3 000]	Gjirokaster county, state-owned	Regional
	<i>Te drejtat e njeriut</i>	Albanian	Magazine	[2 000]	Albanian Center for Human Rights, NGO	National
<i>2000</i>	Albanian/Greek/English	Newspaper	[1 380]	Theodhori Bezhani [person, local]	National	
Bosnia and Herzegovina	<i>Walter</i>	Bosnian	Magazine	[10 000]	Private	National
	<i>Start</i>	Bosnian	Magazine	[5 000]	Private Mr. Dario Novalić	National
	<i>Ekstra</i>	Serbian	Magazine	[5 000]	Private	National
Bulgaria	<i>M-Tel Reviu</i>	Bulgarian	Magazine	[700 000]	Private, foreign, Mobiltel AD	National
	<i>Playboy</i>	Bulgarian	Magazine	[50 000]	Private, USA/Greece/Bulgaria Attica Media Bulgaria Ltd.	National
	<i>Kosa i Stil</i>	Bulgarian	Magazine	[24 000]	Private, Bulgaria, Krustyu Kapanov	National
	<i>Eva</i>	Bulgarian	Magazine	[16 500]	Private, Bulgaria, Eva Agency OOD	National
	<i>Sudbi i Dom</i>	Bulgarian	Magazine	[16 500]	Private, Bulgaria, Rakita Press OOD	National
	<i>Bella</i>	Bulgarian	Magazine	[16 000]	Private, Bulgaria, Dax – Media AD	National
	<i>9 Mesetsa</i>	Bulgarian	Magazine	[11 500]	Private, Bulgaria, Promis ES EOOD	National
	<i>Avtookazion</i>	Bulgarian	Magazine	[11 000]	Private, Bulgaria, Avtookazion OOD	National
	<i>Egoist</i>	Bulgarian	Magazine	[10 000]	Private, Bulgaria, Union Media EOOD	National
	<i>Zhenata Dnes</i>	Bulgarian	Magazine	[9 000]	Private, Bulgaria, RIS OOD	National

Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Croatia	N/A	N/A	N/A	N/A	N/A	N/A
Hungary	<i>Találkozások</i>	Hungarian	Magazine	476 059	Private, Matáv	National
	<i>Patika Magazin</i>	Hungarian	Magazine	206 261	Private, Galenus Gyógyszerészeti Lap- és Könyvkiadó Kft.	National
	<i>Reader's Digest</i>	Hungarian	Magazine	186 043	Private, Reader's Digest Kiadó	National
	<i>Ügyes</i>	Hungarian	Magazine	129 984	Private, Axel Springer Magyarország Kft.	National
	<i>Patika Tükör</i>	Hungarian	Magazine	101 052	Private, Patika Tükör Lapkiadó Kft.	National
	<i>Házi Praktika¹</i>	Hungarian	Magazine	71 058	Private, Sanoma Budapest Rt. (Finland)	National
	<i>Popcorn</i>	Hungarian	Magazine	66 182	Private,	National
	<i>Tina Extra</i>	Hungarian	Magazine	64 915	Private, Sanoma Budapest Rt. (Finland)	National
	<i>Bravo Girl</i>	Hungarian	Magazine	63 489	Private, Sanoma Budapest Rt. (Finland)	National
	<i>Otthon</i>	Hungarian	Magazine	62 086	Private, Sanoma Budapest Rt. (Finland)	National
Macedonia	<i>Taa</i>	Macedonian	Magazine	N/A	NAM d.o.o-Skopje	National
	<i>Zena</i>	Macedonian	Magazine	N/A	N/A	National
	<i>In Shema</i>	Macedonian	Magazine	N/A	N/A	National
	<i>Kompletna</i>	Macedonian	Magazine	N/A	NAM d.o.o-Skopje	National
	<i>Semeen magazin</i>	Macedonian	Magazine	N/A	Prime info Ltd-Skopje	National
	<i>Forum</i>	Macedonian	Magazine	N/A	Forum d.o.o-Skopje	National
	<i>Horoskop</i>	Macedonian	Magazine	N/A	N/A	National
	<i>Magazina Familjare</i>	Albanian	Magazine	N/A	Prime info Ltd-Skopje	National
	<i>Topki</i>	Macedonian	Magazine	N/A	N/A	National
	<i>Avto Berza</i>	Macedonian	Magazine	N/A	N/A	National
Moldova	<i>Alunelul</i>	Romanian	Magazine (12 issues/year)	10 000	Ministry of Education of Republic of Moldova	National
	<i>Ora fermierului</i>	Romanian	Newspaper (24 issues/year)	3 500	Local, private [private person]	National
	<i>Didactica pro</i>	Romanian	Newspaper (24 issues/year)	3 000	Local, PRO DIDACTICA Educational Center [sponsored by the Soros Foundation]	Regional
	<i>Alianta</i>	Romanian	Newspaper (12 issues/year)	3 000	Local, Party of Social Democracy	National
	<i>Social-Democratul</i>	Romanian	Newspaper (24 issues/year)	3 000	Local, Social Democratic Party	National

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Country	Name	Language of publication	Type (newspaper / magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Moldova (cont.)	<i>Capitala magazine</i>	Romanian	Magazine (12 issues/year)	3 000	Local, Chisinau City	Local
	<i>Noi</i>	Romanian	Magazine (12 issues/year)	3 000	Local, Ministry of Education of Republic of Moldova	National
	<i>Moldova si lumea</i>	Romanian	Magazine (12 issues/year)	2 100	Local, Ministry of Foreign Affairs, Free International University of Moldova (ULIM)	National
	<i>Profit – Banci si finante</i>	Romanian	Magazine (12 issues/year)	2 000	Local, Infotag news agency	National
	<i>Adevarul</i>	Romanian	Newspaper (12 issues/year)	2 000	Local, "Terra-1530" NGO	Local
Montenegro	<i>Crnogorski književni list</i>	Serbian	Newspaper, fortnightly	12 000	Private, DUKS D.O.O.	National
	<i>Istok</i>	Serbian	Magazine, monthly	5 000	Private, Donko Rakočević	National
	<i>Svetigora</i>	Serbian	Magazine, monthly	5 000	Mitropolija Crnogorsko-primorska	National
	<i>Lučindan</i>	Serbian	Magazine, periodical ¹	5 000	Montenegrin Orthodox Church	National
	<i>Vrela</i>	Serbian	Magazine, fortnightly	5 000	NGO "Alter Modus"	National
	<i>Prosvjetni rad</i>	Serbian	Newspaper, fortnightly	5 000	Public, "Prosvjetni rad" Publishing House	National
	<i>Justicija</i>	Serbian	Magazine, monthly	4 000	Private, "Justicija"	National
	<i>Polje</i>	Serbian	Newspaper, fortnightly	3 000	Private, "Poljepress" D.O.O.	National
	<i>Juventas</i>	Serbian	Magazine, monthly	3 000	NGO "Juventas"	National
	<i>IVA</i>	Serbian	Magazine, periodical ¹	3 000	NGO "Women's Organization of Montenegro"	National
Romania	<i>Practic in bucatarie</i>	Romanian	Magazine, gastronomic profile	365 994	Private, Romanian capital	National
	<i>Ghid HBO</i>	Romanian	Magazine, TV guide	103 803	Private, foreign capital	National
	<i>Bravo</i>	Romanian	Magazine	96 141	Private, foreign capital	National
	<i>Terra Magazin</i>	Romanian	Magazine	76 974	Private, unknown capital	National
	<i>TV Satelit</i>	Romanian	Magazine, TV guide	76 645	Private, unknown capital	National
	<i>Ioana</i>	Romanian	Magazine	75 668	Private, unknown capital	National
	<i>Cool Girl</i>	Romanian	Magazine	56 136	Private, unknown capital	National
	<i>Playboy</i>	Romanian	Magazine for adults	51 956	Private, Media Pro trust, American-Romanian partnership	National
	<i>Unica</i>	Romanian	Magazine	51 607	Private, unknown capital	National
<i>Hustler</i>	Romanian	Magazine for adults	51 416	Private, Romanian – foreign capital	National	

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Country	Name	Language of publication	Type (newspaper/ magazine)	Single circulation	Ownership	Coverage (national, regional, local)
Serbia	<i>Lepota i zdravlje</i>	Serbian	Magazine	[140 000]	Private (local), Color Media International, Novi Sad	National
	<i>Lea</i>	Serbian	Magazine	[60 000]	Private (local), Color Media International, Novi Sad	National
	<i>Moja beba</i>	Serbian	Magazine	[50 000]	Private (local), Color Media International, Novi Sad	National
	<i>Praktika</i>	Serbian	Magazine	[40 000]	Mixed (local), BIGZ NIP	National
	<i>Profil</i>	Serbian	Magazine	[40 000]	Private (local), Kompanija NIP Profil d.o.o.	National
	<i>Dama</i>	Serbian	Magazine	[40 000]	Private (local), Kompanija NIP Profil d.o.o.	National
	<i>ID</i>	Serbian	Magazine	[35 000]	Private (local), ID Press	National
	<i>Treće oko</i>	Serbian	Magazine	[35 000]	Private (local), Kompanija Novosti AD	National
	<i>Viva</i>	Serbian	Magazine	[33 000]	Private (local), Politika AD	National
	<i>Nada</i>	Serbian	Magazine	[30 000]	Private (local), Kompanija Novosti AD	National
Slovenia	<i>Ognjišče</i>	Slovenian	Magazine	[70 000]	Local	National
	<i>Motorevija</i>	Slovenian	Magazine	[50 000]	Local	National
	<i>Smrklja</i>	Slovenian	Magazine	[40 000]	Local	National
	<i>Anja</i>	Slovenian	Magazine	[40 000]	Local	National
	<i>Zdravje</i>	Slovenian	Magazine	[35 000]	Local	National
	<i>Naša žena</i>	Slovenian	Magazine	[35 000]	Local	National
	<i>Vzajemnost</i>	Slovenian	Magazine	[34 000]	Local	National
	<i>Cosmopolitan</i>	Slovenian	Magazine	[30 000]	Local	National
	<i>Ciciban</i>	Slovenian	Magazine	[30 000]	Local	National
	<i>Frka</i>	Slovenian	Magazine	[28 000]	Local	National

Albania

Notes:

Fortnightly: *2000*, *Femra moderne*, *Trendy*.

Monthly: *Ješa*, *Ngjallja*, *Rreth e Rrotull*.

Bimonthly: *Gazeta e Qarkut Gjirokaster*, *Fllad*.

Quarterly: *Te drejtat e njeriut*.

Eight issues per year: *Mrekullia* (distributed at schools, therefore periodicity depends on the academic year).

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Sources:

Press Clipping, Media Plan Institute Sarajevo

Bulgaria

Sources:

On ownership: media research conducted by ACCESS-Sofia Foundation.

There is no official reliable source on circulation data.

Croatia

Notes:

Data for this category are not available. The existing estimates are too unreliable to be given here.

Hungary

Notes:

¹ *Házi Praktika* has now been renamed *Praktika*.

Sources:

MATESZ (Hungarian Audit Bureau of Circulations)

Szonda-Ipsos – Media and Market Research Institute

Macedonia

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Moldova

Sources:

Media Guide 2002, publishers.

Montenegro

Notes:

¹ Published mostly on a quarterly basis.

Sources:

Montenegro Media Book, Montenegro Media Institute, July 2002 (circulation figures collected directly from publishers statements, there is no Bureau of Circulation in Montenegro)

Romania

Sources:

Audit Bureau of Circulations (BRAT) – www.brat.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

The table does not include licensed magazines which are only translated into the Serbian language and, although with a high print run, do not have journalist content. The same applies to those with cookery recipes, instructions for handicrafts, catalogues of cars, equipment etc., or those which offer ads only.

Circulation is generally given on the basis of the data provided by the print media themselves and estimates of independent sources. Circulation figures frequently differ from the data on readership obtained in various surveys. Names of owners and publishers are often considered a trade secret.

Sources:

Media Register, Serbian Government

Strategic Marketing and Media Research Institute

Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Slovenia

Notes:

Except for *Anja*, which is a fortnightly, and *Ciciban*, with 11 issues a year, the other eight magazines in the table are monthlies.

All figures on circulation are estimates; official data are not available.

Sources:

National Research of Readership 2003, data for second half of 2002 (www.nrb.info/podatki/2002-2.html)

I. 5. Print media in languages other than the official language

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Albania	<i>Romiosini</i>	Greek	Weekly newspaper	[2 500]	A.M.I. company; [Greek capital]
	<i>2000</i>	Albanian/ Greek/ English	Fortnightly newspaper	[1 380]	Theodhori Bezhani [person, local]
	<i>Llajko Vima</i>	Greek	Weekly newspaper	[1 500]	Vasil Jatru [person, (Greek)]
	<i>Albanian Daily News</i>	English	Daily newspaper	[1 300]	Albanian Independent Economic Tribune [organization, local]
	<i>Fratia</i>	Vllah	Monthly newspaper	[1 000]	Albania Arumuns [association, local]
	<i>Dhimiotiki Foni</i>	Greek	Fortnightly magazine	[1 000]	Association of Ethnic Greek Minority Counties [association, (Greek capital)]
	<i>Diplomacy</i>	English	Quarterly magazine	[1 000]	Albanian Academic Diplomacy [organization, local]
	<i>Provoli</i>	Greek	Quarterly magazine	[1 000]	Llambi Thanasi [person, local]
	<i>Albanian Observer</i>	English	Monthly magazine	[600]	Albanian Observer [company, local]
	<i>Frasherotu</i>	Vllah	Monthly newspaper	[500]	Spiro Poci [person, local]
	<i>Fratsia</i>	Vllah	Monthly newspaper	[500]	Aremenji di Albania [association, local]

Notes:

The Vllahs are an ethnic group who speak a dialect of Romanian. Since the 1990s they have established close cultural links with Romania.

Sources:

Monitoring Albanian Media Landscape 2002

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Bosnia and Herzegovina	There are no print media in languages other than the official ones.				

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Bulgaria	<i>Bulgarisches Wirtschaftsblatt</i>	German	Biweekly newspaper	[9 000]	Private, Bulgaria, Business za Vseki Verlag
	<i>Zaman Bulgaristan</i>	Bulgarian, Turkish	Weekly newspaper	[7 000]	Private, Bulgaria, Turkey, Brother Ltd
	<i>Dnevnik</i> ¹	Bulgarian, English	Daily newspaper	[5 000]	Private, Bulgaria, Agency for Investment Information OOD
	<i>Pari</i> ¹	Bulgarian, English	Daily newspaper	[5 000]	Private, Bulgaria, Business Media Group AD
	<i>Filiz</i>	Turkish	Biweekly newspaper	[5 000]	Private, Bulgaria, Filiz Foundation
	<i>Kaynak</i>	Turkish, Bulgarian summary	Monthly magazine	[4 500]	Turkish Cultural Centre
	<i>Yeni Sabah</i>	Bulgarian, Turkish	Weekly newspaper	[4 000]	Private, Bulgaria, Outro Foundation
	<i>Sofia Echo</i>	English	Weekly newspaper	[1 500]	Private, Bulgaria, Independent Information Agency Ltd.
	<i>Erevan</i>	Bulgarian, Armenian	Weekly newspaper	[1 200]	Public, Bulgaria, Erevan Publishing House

Notes:

According to data on minority issues from NGOs and state institutions, a number of other newspapers and magazines are published in Bulgaria with varying and irregular frequency, and a relatively small circulation: *Belaya Volna* and *Russkoye Slovo* in Russian, *Armanlu* in Aromanian, *Vahan* in Armenian, etc.

¹ Pages in English.

Sources:

On ownership: media research conducted by ACCESS-Sofia Foundation.
International Centre for Minority Studies and Intercultural Relations
Interethnic Initiative for Human Rights Foundation

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Croatia	<i>La Voce del Popolo</i>	Italian	Daily newspaper	2 000	EDIT, mixed ownership
	<i>Jednota</i>	Slovakian, Croatian	Weekly newspaper	1 000	JEDNOTA, public-owned
	<i>Prosvjeta</i>	Serbian	Monthly magazine	1 000	NGO, public-owned

Sources:
ICEJ, 2002

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Hungary	<i>Rosszijszkij Kurier</i>	Russian	Fortnightly newspaper	25 000 ¹	Alexander Popov
	<i>The Budapest Sun</i>	English	Weekly newspaper	16 000	Associated Newspapers (UK)
	<i>Budapester Zeitung</i>	German	Weekly newspaper	15 000 ¹	Budapest Zeitung Kft.
	<i>Pester Lloyd</i>	German	Weekly newspaper	15 000 ¹	Buda-Pester-Lloyd Kft.
	<i>The Budapest Times</i>	English	Weekly newspaper	10 000 ¹	Budapest-Zeitung Kft.10
	<i>Le Journal Francophone</i>	French	Weekly newspaper	9 000 ¹	Alexander Popov
	<i>Budapest Business Journal</i>	English	Weekly newspaper	8 700	New World Publishing (USA)
	<i>Business Hungary</i>	English	Monthly magazine	3 000 ¹	DUAX Kft.
	<i>Kethano Drom</i>	Romany, Hungarian	Quarterly	3 000 ¹	Alliance of Roma Organizations in Hungary
	<i>Polonia Wegierska</i>	Polish, Hungarian	Monthly	3 000 ¹	National Polish Minority Self-Government
	<i>Neue Zeitung</i>	German	Weekly newspaper	2 000 ¹	Magyar Hivatalos Közlönykiadó Kft.
	<i>Ararat</i>	Armenian, Hungarian	Monthly	2 000 ¹	People of Armenia Cultural Association
	<i>Srpske Narodne Novine</i>	Serbian	Weekly	2 000 ¹	Serbian Democratic Association
	<i>Világunk</i>	Romany, Hungarian	Monthly	2,000 ¹	National Roma Self-Government
	<i>Országos Ruszin Hírlap</i>	Ruthenian, Hungarian	Monthly	1 500 ¹	Ruthenian Self-Government of Budapest
	<i>Ludové Noviny</i>	Slovakian	Weekly	1 400 ¹	Magyar Hivatalos Közlönykiadó Kft.
	<i>Hrvatski Glasnik</i>	Croatian	Weekly	1 400 ¹	Croatia KHT.
	<i>Kafeneio</i>	Greek, Hungarian	Quarterly	1 300 ¹	National Self-Government of Greek People
	<i>Porabje</i>	Slovenian	Fortnightly	1 250 ¹	Association of Slovenians in Hungary
	<i>Balgarszki Vesztnik</i>	Bulgarian	Monthly	1 200 ¹	National Self-Government of Bulgarian People
	<i>Cronica</i>	Romanian	Monthly	1 000 ¹	National Self-Government of Romanians in Hungary
	<i>Hromada</i>	Ukrainian, Hungarian	Two-monthly	1 000 ¹	Ukrainian Cultural Association in Hungary
	<i>Glos Polonii</i>	Polish, Hungarian	Quarterly	1 000 ¹	National Polish Minority Self-Government
	<i>Új Szemle</i>	Chinese	Weekly	1 000 ¹	Zuanshi Hungary Kft.
	<i>Foiaia</i>	Romanian	Weekly	800 ¹	Editura NOI Român Lap- és Könyvkiadó
	<i>Haemus</i>	Bulgarian, Hungarian	Quarterly	500 ¹	National Self-Government of Bulgarian People

Notes:

¹ Circulation data are based on the number of printed copies.

Sources:

MATESZ (Hungarian Audit Bureau of Circulations)
Publishers of the listed periodicals

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Macedonia	<i>Fakti</i>	Albanian	Daily newspaper	19 013	Private publishing company "Erebara"-Skopje
	<i>Flaka</i>	Albanian	Daily newspaper	4 888	Public publishing company "Nova Makedonija"
	<i>Magazina familjare</i>	Albanian	Monthly magazine	N/A	Prime info Ltd-Skopje
	<i>Birlik</i>	Turkish	Daily newspaper	N/A	Public publishing company "Nova Makedonija"
	<i>Roma Times</i>	Romani	Weekly newspaper	N/A	Private

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Moldova	<i>Komsomol'skaia pravda</i> ¹	Russian	Daily (4/week)	51 190 Friday edition, 7 000 other editions	Komsomol'skaia pravda – Basarabia LTD, Moldovan-Russian venture
	<i>Kommunist</i>	Russian	Weekly newspaper	19 000	Local Communist Party of Moldova
	<i>Sprosi predlozhenie</i>	Russian & Romanian	Weekly newspaper	16 900	Local, [private person]
	<i>Trud-Moldova</i> ¹	Russian	Weekly newspaper	15 600	[Local and Russian] Tav as JSC
	<i>Argumenty i fakty – Moldova</i> ¹	Russian	Weekly newspaper	15 000	Private [local and Russian], Ezhenedel'nyi expres LTD
	<i>Nezavisimaia Moldova</i>	Russian	Daily newspaper (4/week)	10 500	Local, Government of Republic of Moldova
	<i>Novoe vremea</i>	Russian	Weekly newspaper	10 000	Local, private, Nov oe vremea LTD
	<i>Ekonomicheskoe obozrenie</i>	Russian	Weekly newspaper	9 235	Local, Logos Press JSC
	<i>Kishinyovskie novosti</i>	Russian	Weekly newspaper	8 500	[Joint local and Canadian], Kishinyovskie novosti JSC
	<i>Delovaia gazeta</i>	Russian	Weekly newspaper	8 200	[Joint local and Canadian] Novosti LTD & World Assets Media Inc

Notes:

As noted above, this table describes only the first ten publications in languages other than the official one; these are publications in Russian. Only the first ten have been included since 46 non-Romanian titles have been identified, which will make for a very long table. This is an interesting feature to observe in Moldova: The print media in Russian (i.e. a non-official language) command higher circulations and are at least as numerous as the print media in Romanian. For example, compare the circulations of the two language versions of the newspaper *Comunistul/Kommunist*: its Romanian version (*Comunistul*) comes out in 7,000 copies per issue, while its Russian version (*Kommunist*) comes out in 19,000 copies.

¹ These publications are local editions of Moscow-based newspapers, which were very popular in Soviet times and still remain popular in some post-Soviet countries.

Sources:

Media Guide 2002

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Montenegro	<i>Koha javore</i>	Albanian	Weekly newspaper	2 350	Parliament of Republic of Montenegro
	<i>Kronika</i>	Albanian	Weekly newspaper	1 500	Dulcigno press
	<i>Gajret</i>	Bosniak	Periodical magazine ¹	1 000	Organization "Gajret"
	<i>Buzuku</i>	Albanian	Periodical magazine ¹	1 000	NGO "Don Gjon Buzuku"
	<i>Romano alav</i>	Roma	Periodical magazine ¹	1 000	Roma Association in Montenegro
	<i>Zani i shna ndout</i>	Albanian	Monthly magazine	750	Catholic Church of Saint Antun
	<i>Shkendijat</i>	Albanian	Periodical magazine ¹	600	Elementary school
	<i>Kraja</i>	Albanian	Periodical magazine ¹	500	Ostros local authorities
	<i>Lemba</i>	Albanian	Periodical magazine ¹	300	Art club
	<i>Unioni</i>	Albanian	Periodical magazine ¹	100	Political party DUA

Notes:

¹ Published mostly on a quarterly basis.

Sources:

Montenegro Media Book, Montenegro Media Institute, July 2002 (circulation figures collected directly from publishers statements, there is no Bureau of Circulation in Montenegro)

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Romania	<i>Kronika</i>	Hungarian	Newspaper	[15 000]	N/A
	<i>Nepujsag</i>	Hungarian	Newspaper	[15 000]	N/A
	<i>Erdely Riport</i>	Hungarian	Newspaper	[15 000]	N/A
	<i>Bihari Naplo</i>	Hungarian	Newspaper	[15 000]	N/A
	<i>Romania Magyar Szó</i>	Hungarian	Newspaper	[10 000]	N/A
	<i>Hargita Nepe</i>	Hungarian	Newspaper	[10 000]	N/A
	<i>Haromszek</i>	Hungarian	Newspaper	[10 000]	N/A
	<i>Szabadzek</i>	Hungarian	Newspaper	[10 000]	N/A
	<i>Szatmarti Friss Ujsag</i>	Hungarian	Newspaper	[10 000]	N/A
	<i>Brassoi Lapok</i>	Hungarian	Newspaper	[9 000]	N/A
	<i>Erdely Naplo</i>	Hungarian	Newspaper	[3 000]	N/A
	<i>Uj szo</i>	Hungarian	Magazine	N/A	N/A

Notes:

The circulation estimates comes from AZMR.

Sources:

Hungarian Journalists Association (AZMR)

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Serbia	<i>Magiar Szo</i>	Hungarian	Daily newspaper	[13 000]	Public
	<i>Hlas ljudu</i>	Slovak	Weekly newspaper	[5 600]	Public
	<i>Kulska komuna</i>	Hungarian	Monthly newspaper	[5 000]	Public
	<i>Lebertatea</i>	Romanian	Weekly newspaper	[4 000]	Public
	<i>Kikindske novine</i>	Serbian & Hungarian	Weekly newspaper	[4 000]	Public
	<i>Jehona</i>	Albanian	Weekly newspaper	[3 000]	Public
	<i>Csaladi Kor</i>	Hungarian	Weekly newspaper	[2 300]	Public
	<i>Ruske slovo</i>	Ruthenian	Weekly newspaper	[2 300]	Public
	<i>List bratstvo</i>	Bulgarian	Weekly newspaper	[2 100]	Public
	<i>Zornička</i>	Slovak	Monthly newspaper	[2 000]	Public
	<i>Kozsegi naplo</i>	Hungarian	Monthly newspaper	[2 000]	Public
	<i>Uj kanizsai</i>	Hungarian	Weekly newspaper	[1 200]	Public
	<i>Temerin ujsag</i>	Hungarian	Weekly newspaper	[1 100]	Public
	<i>Panorama</i>	Serbian & Hungarian	Monthly newspaper	[1 100]	Public
	<i>Ogledalo</i>	Romanian & Serbian	Monthly newspaper	[1 000]	Public
<i>Filko</i>	Hungarian	Monthly magazine	[300]	Public	

Notes:

Data for Serbia excluding Kosovo.

Although Hungarian and Albanian, in addition to Serbian, are used as official languages in parts of Serbia where there is a Hungarian or an Albanian majority, the media published in their respective languages are treated as national minority outlets and are therefore included in this table.

Sources:

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia
Media Register, Serbian Government

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Slovenia	<i>AB arhitektov bilten</i> ¹	Slovenian, English	Quarterly magazine	N/A	Local (Society of Architects)
	<i>Acta historiae artis slovenica</i>	Slovenian, Italian, English, German	Annual magazine	N/A	Local (ZRC SAZU)
	<i>Annales</i>	Slovenian, Italian, English, German, Croatian, Spanish	Quarterly magazine	N/A	Local
	<i>AR arhitektura / Architecture research</i>	Slovenian, English	Biannual magazine	N/A	Local
	<i>Balkanis</i>	Slovenian, Croatian, Serbian, Macedonian, Bosnian	Quarterly magazine	N/A	Local
	<i>Begunski časi – Refugee Times</i>	Slovenian, English, Bosnian	Two-monthly magazine	N/A	Local
	<i>EIC novice</i>	Slovenian, English	Monthly magazine, biannual in English	N/A	Local
	<i>Happy</i>	Slovenian, English	Two-monthly magazine	N/A	Local
	<i>Hepko</i>	Slovenian, English	Two-monthly magazine	N/A	Local
	<i>Les – Wood</i>	Slovenian, English	Monthly magazine	N/A	Local
	<i>Lipnica</i>	Slovenian, Hungarian	Quarterly magazine	N/A	Local
	<i>Litterate slovenicae</i>	German, French, English, Russian, Spanish	Biannual magazine	N/A	Local
	<i>Monitor ISH</i>	Slovenian, French, English, Italian, German, Spanish	Quarterly magazine	N/A	Local
	<i>Novičke</i>	Slovenian, English	Monthly magazine	N/A	Local
	<i>Primorski utrip</i>	Slovenian, Italian	Monthly magazine	N/A	Local
<i>Schaurein</i>	Slovenian, German	Biannual magazine	N/A	Local	

Country	Name	Language of publication	Type of the media	Single circulation	Ownership
Slovenia (cont.)	<i>Slavistična revija</i>	Slovenian, English, Russian, French, German	Quarterly magazine	N/A	Local
	<i>Slovenia News</i>	English	Monthly magazine	N/A	Local
	<i>Slovenska tiskovna agencija</i>	Slovenian, English	Daily magazine	N/A	Local
	<i>Stripburger</i>	Slovenian, Croatian, Serbian, English	Magazine, three issues a year	N/A	Local
	<i>TVU novičke</i>	Slovenian, English	Magazine, three or four issues a year	N/A	Local

Notes:

¹ Architects' bulletin.

Sources:

Ministry of Culture

II. Internet Media

II. 1. Internet penetration rate (Access to the Internet)

Country	Number of registered Internet users	Number of people using the Internet (as % of population)
Albania	N/A	N/A
Bosnia and Herzegovina	90 000 ¹	16.00 ²
Bulgaria	605 000 ¹	9.60 ²
Croatia	650 390 ¹	18.00
Hungary	544 122 ¹	21.00 ²
Macedonia	163 920	N/A*
Moldova	60 000 ¹	N/A ²
Montenegro	27 000	6.79
Romania	N/A	3.20 ¹
Serbia	700 000	15.00
Slovenia	450 000 ¹	43.00

Albania

Notes:

There is no information – either official data or estimates – on Internet use in the country, perhaps due to the late advent of the Web in Albania and to the poor infrastructure. However, the general opinion is that the Internet does not cover a sizeable part of the population and that users are concentrated in the capital, which until recently was virtually the only place in Albania where the Internet was available.

Sources:

Albanian Media Institute

Bosnia and Herzegovina

Sources:

¹ Communications Regulatory Agency - CRA

² Information and Communications Technologies Forum (ICT Forum) of UNDP Bosnia and Herzegovina

Bulgaria

Notes:

The available sources of information on the Internet penetration rate and Internet users apply different types of methods. Their reliability is practically unverifiable.

Sources:

¹ Communications Regulation Commission Annual Report, 2002.

² Vitosha Research Agency, % of population aged over 18.

Croatia

Notes:

¹ Total number of users according to GFK – Center for Market Research.

Sources:

GFK – Center for Market Research

Hungary

Notes:

¹ According to the Ministry of Informatics and Communications, the number of subscribers to Internet services was 544,122 in June 2003, including 146,165 broadband subscriptions.

² The percentage share of people using the Internet in 2002 was 21%, but completely reliable data on penetration rates are not available.

Sources:

Ministry of Informatics and Communications, 2003

Tárki Research Group, 2002

Macedonia

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

* Editors note:

The figure offered by the contributor here was "553,230." If taken as the number of people, the percent requested (against country population of 2,049,000) might be calculated as 27.

Moldova

Notes:

¹ The data are for 2001.

² The IMAS survey of November 2002 (see sections on broadcast media below) offers the possibility to compute, albeit indirectly, the approximate percentage of Internet users. Thus, to the question, "How often, on average, in the last three months, have you used the Internet?" 1.3% of the respondents answer "Daily (6/7 days per week)", 0.9% say they used the Internet 3-5 days/week, 1.9% 1-2 days/week, 4.5% less than once per week, and 57.5% did not use the Internet at all in the last three months. 34% don't know or don't respond. From this information one can infer that the percentage of Internet users in Moldova is in the region of 8.6%.

Sources:

¹ ITU: International Telecommunication Union at the Ministry of Public Management, Home Affairs, Posts and Telecommunications, Japan (at http://ww91.tiki.ne.jp/~sisyphe/ref/internet_world.htm).

² Opinion poll conducted in November 2002 by IMAS-Inc. (Marketing and Polling Institute) based in Bucharest, Romania.

Montenegro

Notes:

The number of Internet users is 45,000 (this number includes registered Internet users and people who use the Internet at work, at university, etc.).

Sources:

"Internet Cma Gora", Montenegrin Internet Provider

Romania

Notes:

¹ Data for 2000.

Sources:

Ministry of Communications and Information Technology (www.mcti.ro)

Serbia

Notes:

Data for Serbia excluding Kosovo.

Exact data on registered users are not available because of the large number of unregistered providers.

Sources:

Strategic Marketing and Media Research Institute

Slovenia

Notes:

¹ 450,000 active users; 261,000 households.

Sources:

<http://mid.gov.si/>

II. 2. Electronic (online-only) periodicals

Country	Number	Name
Albania	1	www.balkanweb.com
Bosnia and Herzegovina	[11]	www.mediaonline.ba www.bih.co.ba www.sarajev-o-x.com www.saray.net www.superbosna.com www.pincom.info www.sport.co.ba www.omnibus.ba www.monitor.ba www.bljesak.info www.bosnia.ba
Bulgaria	[9] ¹	www.dnesplus.com www.seeurope.net www.novinite.com www.mediapool.bg www.netinfo.bg www.abcbg.com/ezine www.vsekiden.com www.novotoverme.bg www.news.bg
Croatia	N/A	www.iskon.hr www.monitor.hr www.index.hr www.comer.hr www.htnet.hr www.vipnet.hr
Hungary	[6]	www.index.hu www.origo.hu www.gondola.hu www.portfolio.hu www.tozsdeforum.hu www.netlap.hu
Macedonia	-	www.pressonline.com.mk www.on.net.mk www.mt.net.mk
Moldova	6	www.infomarket.md www.yam.ro www.azi.md www.pressbox.md www.reporter.md www.press.try.md
Montenegro	5	www.pcnen.cg.yu www.cafemontenegro.cg.yu www.mnnews.net www.medijaklub.cg.yu www.mntoday.com
Romania	2	www.anchete.ro www.agora.ro
Serbia	12	www.9812.co.yu tv.9812.co.yu www.uzice.net/ui

Country	Number	Name
Serbia (cont.)		www.beocity.com www.beograd.com www.balkansecurity.com www.economy.co.yu www.freaserbia.org www.freaserbia.net www.inet.co.yu www.cpa.org.yu www.ticker-magazin.com
Slovenia	5	www.casopis-vovk.si www.kabi.si/si21/morel www.ljubljana.si www.mtay.si www.acs.si/novicke

Albania

Notes:

This website contains general hard news, and it is updated on a daily basis. The website belongs to the same company (with Italian capital) which owns *Gazeta Shqiptare*, *Radio RASH*, and *News 24*.

Sources:

Albanian Media Institute

Bosnia and Herzegovina

Sources:

Media Plan Institute

Bulgaria

Notes:

¹ This is a conservative estimate. The real number is most probably much higher.

Sources:

Media research conducted by ACCESS-Sofia Foundation.

Croatia

Notes:

Data on the exact number of electronic periodicals are unavailable. Those mentioned above are the most popular ones.

Hungary

Notes:

These are the periodicals that are continuing to operate and to provide content. Several other initiatives (e.g. politikaforum.hu) were launched but became barely functional as periodicals.

Sources:

MTE (Association of Hungarian Content Providers)

Macedonia

Notes:

The list of online newspapers and websites is incomplete. Official data on the number of e-media are unavailable. The above-mentioned websites are arguably the most popular ones.

Sources:

Macedonian Institute for Media

Moldova

Sources:

Media Guide 2002.

Montenegro

Sources:

Montenegro Media Book, Montenegro Media Institute, July 2002.

Romania

Notes:

All Romanian newspapers have electronic versions, but they do not contain more information than the print versions.

Sources:

www.traffic.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

The above-mentioned sites do not have any substantial influence. Far more influential are the websites of other media, and all leading print media as well as radio and TV channels have regularly updated websites.

Sources:

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia
Media Register, Serbian Government

III. Television

III. 1. Television companies: registration, coverage and ownership

III. 1. 1. Total television companies

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV broadcasters	62	44	N/A	15	65	67	85	12	50	[176]	34
Registered TV broadcasters	62	44	119	15	65	67	85	12	50	[176]	34
With national coverage license	3	N/A	17	2	9	3	2	5	N/A	[7]	4
With local coverage license	59	N/A	102	13	56	64	83	7	N/A	[169]	30
In the capital city only	15	N/A	3	0	22	16	17	1	N/A	[7]	5

III. 1. 2. Public television companies

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV broadcasters	4	18	9	1	6	13	3 ¹	2	N/A	[87]	1
Registered TV broadcasters	4	18	9	1	6	13	3	2	N/A	[87]	1
With national coverage license	1	N/A	2	1	3	1	1 ²	1	N/A	[3]	1
With local coverage license	3	N/A	7	0	3	12	2	1	N/A	[84]	0
In the capital city only	0	N/A	0	0	0	1	1	0	N/A	[0]	0

III. 1. 3. Private television companies

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV broadcasters	58	26	N/A	14	59	54	82	10	N/A	[89]	33
Registered TV broadcasters	58	26	110	14	59	54	82	10	N/A	[89]	33
With national coverage license	2	N/A	15	1	6	2	1	4	N/A	[4]	3
With local coverage license	56	N/A	95	13	53	52	81	6	N/A	[85]	30
In the capital city only	15	N/A	3	0	22	15	16	1	N/A	[7]	5

Albania

Notes:

The rows indicating the number of registered TV broadcasters in the capital city only, are based on location of TV headquarters, excluding the national TV broadcasters – which of course have their headquarters in the capital but have been omitted here considering their national license and coverage. Also, since the registered TV broadcasters in the capital possess a local license, they also qualify in the category of broadcasters with local coverage license.

Sources:

Official website of the National Council of Radios and Televisions, www.ncrt.gov.al

Bosnia and Herzegovina

Notes:

Data on the number of TV broadcasters with national and local coverage licenses are not available yet.

Source:

Communications Regulatory Agency – CRA

Bulgaria

Notes:

The available official data cover registered TV broadcasters only.

Sources:

Council for Electronic Media
Communications Regulation Commission

Croatia

Sources:

www.telekom.hr/Konc.htm

Hungary

Notes:

Data available for the first six months of 2003. These figures do not include the media organizations that operate mainly as programme distributors by cable. They are considered as TV channels. See data for TV channels "broadcast by cable" in Section III. 2.

Sources:

National Radio and Television Commission

Macedonia

Notes:

National Macedonian TV is registered as one broadcaster, although it has three different channels.

The 13 public TV stations include 12 local TV stations and one national: National Macedonian TV (part of MRTV), which has three different channels (two in the Macedonian language and one in languages of minorities in the country). All three channels are with a national coverage license.

Sources:

Broadcasting Council of the Republic of Macedonia

Moldova

Notes:

In Moldova there is virtually no TV or radio channel broadcasting exclusively in the official language. There are always shows or newscasts in Russian, and on some channels in other minority languages (Ukrainian, Gagauz, Bulgarian, etc.). Therefore, no differentiation has been made between channels in the official language and in other languages. Also, of the total number of about 150 licensed broadcasters (both TV and radio), only the national channels and the Chisinau City's stations (Radio Antena C and Euro TV) have considerable original programming. All other broadcasters usually rebroadcast Russian channels and provide some form of periodic local news. The information used in the survey reproduces the figures in the Broadcasting Coordination Council (BCC, the licensing authority) registry of licensees (as of early 2002), and each licensee is treated as a broadcaster regardless of the amount of original programming.

"Number of TV broadcasters" figures include both over-the-air and cable companies; the majority of them are very small, with limited local importance.

¹ The three public broadcasters are Moldova 1, Euro TV, and TV Gagauzia. Moldova 1 became public by statute following the passage in July 2002 of the Law on the Public Broadcaster Teleradio Moldova (it used to be a state-controlled company, whereas under the new law it is managed by a steering board representing different segments of society). Euro TV was created by the City of Chisinau, but there is no legal act defining its status; hence technically this is a public channel, while legally it has an obscure status. Recently there has been pressure from the central government on the Chisinau authorities to "legalize" the public status of Euro TV through a law to this effect. TV Gagauzia is the channel owned by the authorities of the Autonomous Region of Gagauzia.

² The broadcasters with national coverage are Moldova 1 and ORT. The latter is the public Russian channel rebroadcast in Moldova, but with a local office and a daily local programming of one hour (mainly news and local advertising). This is a common situation in Moldovan broadcasting, where foreign channels are rebroadcast with some local inserts (mainly from Russia, but also one from Romania). Therefore, it is difficult to categorize such channels, but since they contain local programmes they have been included in the survey. Neither is it clear whether the public Russian channel ORT should be categorized in Moldova as public or private. It is treated here as private since legally it is not controlled by the Moldovan authorities.

Montenegro

Sources:

Montenegro Media Book, MMI, July 2002
Broadcasting Agency
Republic Statistical Department

Romania

Notes:

There are no unregistered TV broadcasters.

Registered TV broadcasters operate in 36 counties (from a total of 41 counties). TV broadcasters with a national coverage and a local coverage license, as well as private or public broadcasters, are not registered separately.

Sources:

The National Council of Broadcasting (CNA); www.cna.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

Due to the moratorium (see below), proper licenses do not exist. In reality, however, the RTS with its three channels, and TV Pink and TV BK are, judging by the relevant indicators, actually national broadcasters, and TV B92 and Info 24 are close behind. All others operate as "pirate" stations, including some which are municipal-owned but do not have a licence, and a number of newly established private stations, with coverage ranging from minimal to regional.

The Serbian Chamber of Commerce has registered 309 privately owned radio and TV broadcasters, nine public owned and 18 of mixed ownership, adding up to a total of 336. However, research work on the subject and data from other sources suggest that this figure is far from accurate.

Only the stations registered in the *Media Guidebook* are listed in "Number of TV broadcasters". However, it is estimated that they are far more numerous – around 300.

On the subject of "Registered TV broadcasters": A moratorium on frequencies is in force and only the state RTS is licensed to operate. All other broadcasters are awaiting legalization.

On the subject of "With national coverage license": The data refer to actual coverage rather than license – a licensing procedure has not been initiated to date.

On the subject of "With local coverage license": Local-public broadcasters are generally municipal-owned and are due to be privatized by 2006.

Sources:

Strategic Marketing and Media Research Institute,

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Media Register, Serbian Government

Media Center, Belgrade

Serbian Chamber of Commerce

Slovenia

Notes:

Ministry of Culture and Broadcasting Council

III. 2. Television channels: registration, coverage and ownership

III. 2. 1. Total television channels

Number of TV channels	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
	62	45	N/A	17	382	69	85	14	120	[178]	37
Registered TV channels	62	45	147	17	382	69	85	14	120	[178]	37
National channels	3	N/A	20	4	17	5	2	7	N/A	[9]	5
Local channels	59	N/A	127	13	365	64	83	7	N/A	[169]	32
In the capital city only	15	N/A	3	N/A	19	18	17	1	N/A	[7]	5

III. 2. 2. Public television channels

Number of TV channels	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
	4	18	9	3	43	15	3	4	N/A	[89]	4
Registered TV channels	4	18	9	3	43	15	3	4	N/A	[89]	4
National channels	1	N/A	2	3	3	3	1	3	N/A	[5]	2
Local channels	3	N/A	7	0	40	12	2	1	N/A	[84]	2
In the capital city only	0	N/A	0	N/A	0	3	1	0	N/A	[0]	0

III. 2. 3. Private television channels

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV channels	58	27	N/A	14	339	54	82	10	N/A	[89]	33
Registered TV channels	58	27	138	14	339	54	82	10	N/A	[89]	33
National channels	2	N/A	18	1	14	2	1	4	N/A	[4]	3
Local channels	56	N/A	120	13	325 ¹	52	81	6	N/A	[85]	30
In the capital city only	15	N/A	3	N/A	19	15	16	1	N/A	[7]	5

III. 2. 4. Television channels – broadcast by air

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV channels	57	45	3	17	58	0	38	13	10	[178]	N/A
Registered TV channels	57	45	3	17	58	0	38	13	10	[178]	N/A
National channels	3	N/A	3	4	3	0	2	6	N/A	[9]	2
Local channels	54	N/A	0	13	55 ²	0	36	7	N/A	[169]	12
In the capital city only	15	N/A	0	N/A	2	0	8	1	N/A	[7]	1

III. 2. 5. Television channels – broadcast by cable

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV channels	5	N/A	N/A	0	310	69	47	0	N/A	[25]	N/A
Registered TV channels	5	N/A	144	0	310	69	47	0	N/A	[25]	N/A
National channels	0	N/A	17	0	0	5	0	0	N/A	[9]	3
Local channels	5	N/A	127	0	310 ³	64	47	0	N/A	[24]	20
In the capital city only	0	N/A	3	0	17 ³	18	9	0	N/A	[7]	4

III. 2. 6. Television channels – broadcast by satellite

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Number of TV channels	N/A	1	N/A	3	14 ⁴	1 ¹	0	1 ¹	22	4	N/A
Registered TV channels	N/A	1	15	3	14 ⁴	1 ¹	0	1 ¹	22	0	N/A
National channels	N/A	N/A	15	3	14 ⁴	1 ¹	0	1 ¹	N/A	4	1 ¹
Local channels	N/A	N/A	0	0	0	0	0	0	N/A	0	1 ²
In the capital city only	N/A	N/A	0	0	0	0	0	0	N/A	0	N/A

Albania

Notes:

The last row of the tables, indicating the number of the registered TV channels in the capital city only, is based on location of TV headquarters, excluding the national TV channels – which of course have their headquarters in the capital but have been omitted here considering their national coverage. Also, since the registered TV channels in the capital possess a local license, they also qualify in the category of local channels.

Sources:

Official website of the National Council of Radios and Televisions, www.ncrt.gov.al

Bosnia and Herzegovina

Notes:

Data on the number of national and local TV channels as well as the TV channels broadcast by cable are not available yet.

Source:

Communications Regulatory Agency – CRA

Bulgaria

Notes:

Data available on registered channels only.

Sources:

Council for Electronic Media

Croatia

Notes:

"National channels" interpreted both in geographical terms and received by 70% of population.

The total number of TV broadcasters is 15. These broadcasters have 17 TV channels in all, of which three are public channels.

Sources:

Research Department of Croatian Radio and Television Company

Hungary

Notes:

¹ This number includes television channels under both private and mixed ownership: two regional television channels, 13 local channels broadcasting by air; 310 cable channels, including five non-profit channels.

² This number includes 47 local television stations and eight regional registered television stations.

³ These are registered local television cable channels. Apart from a few-hour-long local production, they mainly distribute programmes of local/regional, national and legally accessible foreign television channels by cable.

⁴ In 2002 there were 16 television channels registered in Hungary to broadcast programmes by satellite, but two of them were not operational. From these 14, two national television channels (Duna and M2) are public (state-owned), and the other 12 are private channels.

Sources:

National Radio and Television Commission (NRTC) – Annual Report, 2002

Macedonia

Notes:

¹ National Macedonian TV (part of MRTV) has a channel that is broadcast by satellite and is for Macedonian emigrants. The channel is not broadcast in the country.

Sources:

Broadcasting Council of the Republic of Macedonia

Moldova

Notes:

See notes to III.1. The information is identical, plus a further breakdown by air/cable.

Montenegro

Notes:

¹ Part of the programme of National Television (TVCG 1) is broadcast by satellite.

Sources:

Montenegro Media Book, MMI, July 2002

Broadcasting Agency

Republic Statistical Department

Romania

Notes:

There are no unregistered TV channels.

Sources:

The National Council of Broadcasting (CNA)

www.cna.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

The absence of proper legal regulations and non-observance of any rules in establishing media outlets (print and broadcast media alike) in recent years, has created a true "media jungle" in Serbia. According to the Agency for Media Research and Public Relations of the FRY, as many as three-quarters of the total number of media have been created in the past 12 years, with 2000 as the record year with 157 new media outlets, followed by 2001 with 132 and 2002 with 47. There is no information-related justification for the opening or closure of media outlets. The reasons are primarily associated with political promotion or personal gain. Apart from that, in the 1990s the media became political instruments and the government consequently established control over TV stations. After the opposition came out victorious in the 1996/97 local elections, a large number of municipal TV stations became anti-government and donor-financed. This kind of financing started an onrush of new TV stations. Continuing changes in the number of outlets, primarily among electronic media – occurring almost every other day, to judge by the statistical review of the years in which the largest numbers of new media outlets were created – makes it virtually impossible to produce a systematized set of accurate data.

Sources:

Strategic Marketing and Media Research Institute

Media Center, Belgrade

Yugoslav Media Guide, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Media Register, Serbian Government

Slovenia

Notes:

¹ TV Slovenija.

² TV Pika.

III. 3. Number of the non-commercial television channels

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
	0	0	0	0	0	0	0	3	0	0	0

Albania

Sources:
Albanian Media Institute

Bosnia and Herzegovina

Source:
Communications Regulatory Agency – CRA

Croatia

Sources:
Research Department of Croatian Radio and Television Company

Montenegro

Notes:
National Television (TV CG 1 and TV CG 3) and the Parliamentary Channel are non-commercial.

Sources:
Montenegro Media Book, MMI, July 2002
Republic Statistical Department

Serbia

Notes:
Data for Serbia excluding Kosovo.
The law permits the PBS to broadcast commercials, running up to 10% per hour, so virtually all stations air adverts.

Sources:
Media Center, Belgrade

III. 4. Number of the Pay-TV channels

Country	Domestic channels	Foreign channels
Albania	6	0
Bosnia and Herzegovina	0	0
Bulgaria	0	1
Croatia	0	0
Hungary	1	0
Macedonia	0	0
Moldova	0	0
Montenegro	0	0
Romania	0	1
Serbia	0	0
Slovenia	0	N/A

Albania

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Source:

Communications Regulatory Agency – CRA

Bulgaria

Sources:

Media research conducted by ACCESS-Sofia Foundation.

Moldova

Notes:

All channels, including HBO and sex channels such as XXL, are sold as part of cable packages.

Montenegro

Notes:

All TV channels are cost free. Cable TV broadcasts foreign channels free of charge.

Sources:

Republic Statistical Department

Romania

Notes:

The only Pay-TV channel is HBO-Romania, foreign capital.

Serbia

Notes:

Data for Serbia excluding Kosovo.

Sources:

Media Center, Belgrade

III. 5. Television programming by content

III. 5. 1. Television channels - total

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest	60	N/A	97	17	6	N/A	N/A	13	N/A	[163]	N/A
B. Specialized channels	3	N/A	50	0	11	N/A	N/A	1	N/A	[15]	N/A
B.1. Political, social, business news and commentaries	1	N/A	3	0	3	N/A	N/A	1	N/A	[3]	N/A
B.2. Sport	1	N/A	1	0	1	N/A	N/A	0	N/A	[1]	N/A
B.3. Music	0	N/A	22	0	2	N/A	N/A	0	N/A	[6]	N/A
B.4. Drama and fiction	0	N/A	18	0	0	N/A	N/A	0	N/A	[0]	N/A
B.5. Other	1	N/A	6	0	5	N/A	N/A	0	N/A	[5]	N/A
C. Total (A+B)	63	N/A	147	17	17	N/A	N/A	14	N/A	[178]	N/A

III. 5. 2. Television channels - public

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest	4	N/A	8	3	3	N/A	N/A	3	N/A	[89]	N/A
B. Specialized channels	0	N/A	1	0	0	N/A	N/A	1	N/A	[0]	N/A
B.1. Political, social, business news and commentaries	0	N/A	0	0	0	N/A	N/A	1	N/A	[0]	N/A
B.2. Sport	0	N/A	0	0	0	N/A	N/A	0	N/A	[0]	N/A
B.3. Music	0	N/A	0	0	0	N/A	N/A	0	N/A	[0]	N/A
B.4. Drama and fiction	0	N/A	0	0	0	N/A	N/A	0	N/A	[0]	N/A
B.5. Other	0	N/A	1	0	0	N/A	N/A	0	N/A	[0]	N/A
C. Total (A+B)	4	N/A	9	3	3	N/A	N/A	4	N/A	[89]	N/A

III. 5. 3. Television channels - private

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest	56	N/A	89	14	3	N/A	N/A	10	N/A	[74]	N/A
B. Specialized channels	3	N/A	49	0	11	N/A	N/A	0	N/A	[15]	N/A
B.1. Political, social, business news and commentaries	1	N/A	3	0	3	N/A	N/A	0	N/A	[3]	N/A
B.2. Sport	1	N/A	1	0	1	N/A	N/A	0	N/A	[1]	N/A
B.3. Music	0	N/A	22	0	2	N/A	N/A	0	N/A	[6]	N/A
B.4. Drama and fiction	0	N/A	18	0	0	N/A	N/A	0	N/A	[0]	N/A
B.5. Other	1	N/A	5	0	5	N/A	N/A	0	N/A	[5]	N/A
C. Total (A+B)	59	N/A	138	14	14	N/A	N/A	10	N/A	[89]	N/A

III. 5. 4. General broadcasting time - hours per day

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest	[827]	N/A	2 043	81.56	120 ¹	N/A	N/A	N/A	N/A	[3 260]	N/A
B. Specialized channels	[65]	N/A	1 010	0	207 ²	N/A	N/A	N/A	N/A	[316]	N/A
B.1. Political, social, business news and commentaries	[24]	N/A	53	0	54 ²	N/A	N/A	N/A	N/A	[72]	N/A
B.2. Sport	[17]	N/A	18	0	12 ²	N/A	N/A	0	N/A	[24]	N/A
B.3. Music	0	N/A	452	0	48 ²	N/A	N/A	0	N/A	[144]	N/A
B.4. Drama and fiction	0	N/A	373	0	0	N/A	N/A	0	N/A	[0]	N/A
B.5. Other	[24]	N/A	114	0	93 ²	N/A	N/A	0	N/A	[76]	N/A
C. Total (A+B)	[892]	N/A	3 053	81.56	327	N/A	N/A	N/A	N/A	[3 576]	N/A

Albania

Notes:

One of the specialized channels qualifies under two of the categories (B.3. and B.4.), as it broadcasts both drama and fiction, and music. However, it has been categorized as a specialized channel because these are the only kinds of programmes aired.

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

There are no official data on the general broadcasting time (hours in year 2002) for TV and radio stations registered in Bosnia and Herzegovina. There is a report on the number of TV stations in Bosnia and Herzegovina that broadcast certain categories of programmes ("Programmes Available to Viewers and Listeners in Bosnia and Herzegovina" at <http://www.cra.ba/en/broadcast/reports/default.aspx?cid=2356>).

Bulgaria

Notes:

Data available on registered channels only.

Sources:

Council for Electronic Media

Croatia

Sources:

Research Department of Croatian Radio and Television Company

Hungary

Notes:

The data are based on the daily average broadcasting time of the Hungarian national television channels and registered satellite channels only.

¹ Monitoring study by the National Radio and Television Commission and the Communication Theory Research Group of the Hungarian Academy of Sciences / ELTE University, on the programmes of the national Hungarian television channels, March 2002.

² Broadcasting time data are based on published TV programme listings.

Sources:

National Radio and Television Commission, Annual Report 2002

Moldova

Notes:

Paradoxical as it may seem given the huge number of TV licenses issued by the BCC, there are no specialized domestic channels in Moldova. As noted above, most of the licensees rebroadcast some Russian channel and produce only about half an hour to one hour of local news. During an interview conducted for the purposes of this survey, a BCC official said that the BCC kept no systematic records of such data. No audits as to broadcast hours have been made either. Therefore, no information is available for this section.

Montenegro

Notes:

The Republic Statistical Department provides data on broadcasting time only in hours per year:

- General interest channels: 60,302 hours (for nine TV channels)

- Specialized channel (political, social, business news and commentaries) 1,236 hours per year (for one TV channel: the Parliamentary Channel)

Sources:

Republic Statistical Department

Romania

Notes:

Romania's statistical yearbook does not contain such information. Other comprehensive studies are not available.

Serbia

Notes:

Data for Serbia excluding Kosovo.

The data given here are not entirely reliable, but nevertheless give a general picture.

Sources:

Strategic Marketing and Media Research Institute

Media Center, Belgrade

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Media Register, Serbian Government

Slovenia

Notes:

No data are available specifically as regards the number or percentage of TV and radio channels/stations/programmes by type and origin.

III. 6. Broadcasting time by origin of programme (hours in year 2002)

	Bosnia and										
	Albania	Herzegovina	Bulgaria	Croatia ¹	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Own products - total	[128 425]	N/A	N/A	7 264	N/A	N/A	N/A	28 527	N/A	N/A	N/A
Own products - average per channel	[2 038.5]	N/A	N/A	19.9	N/A	N/A	N/A	2 852.7	N/A	N/A	N/A
Imported products - total	[95 265]	N/A	N/A	4 271	N/A	N/A	N/A	16 299	N/A	N/A	N/A
Imported products - average per channel	[1 512]	N/A	N/A	11.7	N/A	N/A	N/A	1 629.9	N/A	N/A	N/A
External products - total	[48 873]	N/A	N/A	146	N/A	N/A	N/A	8 204	N/A	N/A	N/A
External products - average per channel	[776]	N/A	N/A	0.4	N/A	N/A	N/A	820.4	N/A	N/A	N/A

Albania

Notes:

The figures distinguishing between "imported products" and "external products" originate from the *Monitoring Albanian Media Landscape 2002* report; however, they must be taken with some reservation, as there is a sizeable quantity of programmes which are foreign but have not been bought by the stations because the copyright law is not properly enforced.

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

There are no official data on the broadcasting time by origin of programme (hours in year 2002) for TV and radio stations registered in Bosnia and Herzegovina.

Croatia

Notes:

¹ Data on the three public channels only.

Sources:

Research Department of Croatian Radio and Television Company

Hungary

Notes:

According to the monitoring study by the National Radio and Television Commission and the Communication Theory Research Group of the Hungarian Academy of Sciences / ELTE University, the proportion of own and imported products in the programmes of the national Hungarian television channels was 78.2% and 21.8% respectively. The study contains data about the March 2002 broadcasting of national television channels. Data about other televisions were not available. The report on the research was published in the Annual Report of the National Radio and Television Commission.

Sources:

National Radio and Television Commission

Macedonia

Notes:

Official data on this issue are not available. It can be estimated that the average share of "own products" is 15% to 20% of the total, which means that the average share of "imported products" is approximately 80% to 85% of the total broadcasting time.

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Montenegro

Notes:

These data refer only to ten TV channels. (No data are available on three channels.)

Sources:

Republic Statistical Department

Romania

Notes:

Romania's statistical yearbook does not contain such information. Other comprehensive studies are not available.

Serbia

Notes:

Data for Serbia excluding Kosovo.

Under the law which has been passed but not enforced, all stations must broadcast at least 50% of programmes of their own production at least 50% of their total transmission time.

Sources:

Strategic Marketing and Media Research Institute
Media Center, Belgrade

III. 7. Domestic television broadcasting in languages other than the official one

Country	Name of programme in language other than the official one	Channel	Language	Average broadcasting time of programme (hours) per day	Total broadcasting time of channel (hours) per day	Channel ownership (private or public)
Albania	Newscast	Real TV	Italian	0.5	17	Real Televizion, company, local
Bosnia and Herzegovina	There are no domestic channels with programmes in languages other than the official ones.					
Bulgaria	Novini na turski ezik (News in Turkish)	Channel 1 – Bulgarian National Television	Turkish	0.25	24	Public
Croatia	There are no domestic channels with programmes in languages other than the official one.					
Hungary	Roma magazin	M2	Romany	0.06 ¹	24	Hungarian Television, state-owned
	Domovina	M2	Slovakian	0.06 ¹	24	Hungarian Television, state-owned
	Sprski ekran	M2	Serbian	0.06 ¹	24	Hungarian Television, state-owned
	Unser Bildschirm	M2	German	0.06 ¹	24	Hungarian Television, state-owned
	Hrvatska Kronika	M2	Croatian	0.06 ¹	24	Hungarian Television, state-owned
	Ecranul nostru	M2	Romanian	0.06 ¹	24	Hungarian Television, state-owned
	Rondó	M2	Ukrainian, Armenian, Greek, Bulgarian, Ruthenian and Slovenian	0.19 ²	24	Hungarian Television, state-owned
Macedonia	N/A	MTV 3	Minority languages	13	13	Public
	All programmes	TV ART	Albanian	13	13	Private
	All programmes	TV HANA	Albanian	12	12	Private
	N/A	TV ERA	Albanian	7	12	Private
	N/A	TV BTR	Romany	9	12	Private
	N/A	TV SUTEL	Romany	7	12	Private

Country	Name of programme in language other than the official one	Channel	Language	Average broadcasting time of programme (hours) per day	Total broadcasting time of channel (hours) per day	Channel ownership (private or public)
Moldova	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	Lajmet ¹	TVCG 1	Albanian	0.18 ¹	20	Public
	Mozaiku 60 ²	TVCG 1	Albanian	0.14 ²	20	Public
	N/A	TV Teuta	Albanian	N/A	N/A	Private
	N/A	TV Bojn	Albanian	N/A	N/A	Private
Romania	Special programme for Hungarian minority ¹	Romanian Public Television	Hungarian	[0.4] ³	24	Public
	Special programme for Roma minority ²	Romanian Public Television	Romanian and Roma	[0.2] ⁴	24	Public
	All programmes	Digital 3	Hungarian	12	12	Private, local
	All programmes	Syn TV	Hungarian	12	12	Private, local
Serbia	All programmes	TV Toni	Albanian	24	24	Private
	All programmes	TV Petrovac	Slovak	16	16	Public
	All programmes	TV Luna	Hungarian	18	18	Private
	All programmes	TV Nisava	Romany	24	24	Public
	Daily news in Romany	TV Novi Sad 2	Romany	0.25	24	Public
	Daily news in Slovak	TV Novi Sad 2	Slovak	0.25	24	Public
	Daily news in Ruthenian	TV Novi Sad 2	Ruthenian	0.25	24	Public
	Daily news in Hungarian	TV Novi Sad 2	Hungarian	0.25	24	Public
	Time of Youth	TV Novi Sad 2	Ruthenian	0.5	24	Public
Duhovka	TV Novi Sad 2	Slovak	0.5	24	Public	
Slovenia	N/A	Čarli TV	Slovenian, English	N/A	24	Private
	N/A	Sponka TV	Slovenian, Italian	N/A	24	Private
	TV programme for the Italian national minority	TV Koper Capodistria	Slovenian, Italian	9.6	11.2	Public
	N/A	TV Maribor – Telem	Slovenian, Hungarian	N/A	17	Public
	N/A	TV Primorka	Slovenian, Italian	N/A	7	Private

Albania

Sources:
Albanian Media Institute

Bulgaria

Notes:
There are no reliable data on other programmes.

Hungary

Notes:
Data are available about the foreign language programmes of the M2 television channel only.
¹ 26 min/week
² 78 min/week
Sources:
Hungarian Television

Macedonia

Notes:
Of MTV 3's total broadcasting time of 13 hours per day, nine hours are in Albanian and the remaining four hours are in the other minority languages (Turkish, Roma, Serbian, Bosnian and Vlach).
Sources:
Broadcasting Council of the Republic of Macedonia

Montenegro

Notes:
¹ Five times a week, 15-minute programme.
² Once a week, one-hour programme.
The national television channel (TVCG 1) has "Flash News" and a "TV Show" in Albanian. Two private TV channels (TV Teuta and TV Boin) have mixed programmes in Albanian and Serbian.
Sources:
Republic Statistical Department

Romania

Notes:
¹ Programme broadcast nationally (from Bucharest) and by two regional stations (Cluj, Timisoara).
² Programme broadcast nationally (from Bucharest) and by one regional station (Cluj).
³ 2-3 hours per week
⁴ 1-2 hours per week
Sources:
For Hungarian minority, Hungarian Journalists Association (AZMR)
For Roma minority, Roma Center for Public Policy

Serbia

Notes:
Data for Serbia excluding Kosovo.
Although Hungarian and Albanian, in addition to Serbian, are used as official languages in parts of Serbia where there is a Hungarian or an Albanian majority, the programmes broadcast in their respective languages are treated as national minority programmes and are therefore included in this table.
In addition to the above-mentioned programmes, TV Novi Sad – in Vojvodina, a province inhabited by a large number of national minorities – has at least one more hour of programmes in the languages of national minorities.
Sources:
Strategic Marketing and Media Research Institute
Media Center, Belgrade
TV Novi Sad

III. 8. TV-stations' share of viewing time (%)

Country	Name	%
Albania	Klan	21.5
	TVSH	17.1
	Top Channel	11.9
	Telenorba Shqiptare	11.3
	TVA	8.2
	Vizion +	3.4
	Telesport	3.2
	TV Shijak	2.7
	TV Teuta	2.2
	Gjeli Vizion	1.3
	TV 2000	1.2
	Kombi	1.2
	Tv Diber	1.1
	Neser TV	1.0
	TV Koha	1.0
	Egnatia TV	1.0
	Others	10.7
	Total	100
	Bosnia and Herzegovina	FTV 1
HRT 1		18.0
RTRS		11.9
BH TV 1		10.8
FTV 2		8.2
OBN		6.7
HRT 2		6.4
Mreza +		6.1
Pink		5.6
BN		4.8
HRT 3		4.0
TK		3.3
Alternativ na Telev izija Banja Luka		3.2
Hayat		2.6
Nov a		2.3
NRTV Banja Luka		2.1
USK		2.0
RTS 1		1.7
Kanton Sarajev o SA		1.6
Kiseljak - KISS TV		1.6
NRTV studio 99		1.1
Kanal 3		1.0
Amna		1.0
Others	15.4	
Total	163.9	
Bulgaria	bTV	42.7
	Channel 1	41.4
	Channel D (Turkey)	1.6
	Nov a Telev izia	1.5
	Diema +	0.9
	Discovery Channel	0.7

Country	Name	%
Bulgaria	Evrocom	0.5
(cont.)	Channel 3	0.5
	Channel Planeta	0.4
	M SAT	0.3
	Others	6.6
	Don't watch TV	2.9 ¹
	Total	100
Croatia	HTV1	54.61
	HTV2	21.19
	HTV3	11.6
	Nov a TV	10.77
	Others	2.18
	Total	100
Hungary	TV2	29.6
	RTL-Klub	28.9
	M1	15.9
	Viasat 3	2.5
	M2	2.2
	Duna	1.7
	Magyar ATV	1.7
	Minimax	1.2
	HBO	1.1
	Sport 1	1.0
	Spektrum	0.9
	Viv a	0.6
	Others	12.7
	Total	100
Macedonia	A1 TV	27.5
	MTV 1	20.2
	SITEL TV	14.0
	MTV 3	5.3
	MTV 2	3.2
	Others	29.8
	Total	100
Moldova	ORT	43.7
	Moldov a 1	35.0
	Pro TV	2.9
	NIT	1.3
	TVC21	0.7
	Flor TV	0.6
	TV26	0.5
	Others	15.2
	Total	100
Montenegro	RTCG 1	40.3
	TV IN	17.9
	RTCG 2	12.0
	TV Elmag	7.8
	TV Pink	4.9

Country	Name	%
Montenegro	MBC	4.6
(cont.)	TV Montena	4.2
	TV Sky Sat	2.9
	Foreign TV stations	1.8
	TV Niksic	1.3
	Satellite program	0.9
	Others	1.4
	Total	100
Romania	Pro TV	21.2
	Antena 1	18.8
	Romania 1	13.6
	Prima TV	11.4
	Acasa TV	9.7
	TVR 2	4.4
	Tele 7 abc	1.4
	Atomic TV	0.9
	Others	18.6
	Total	100
Serbia	TV Pink	20.2
	RTS 1	20.2
	RTS 3	9.0
	BK TV	8.8
	RTS 2	7.0
	Košava	2.3
	B 92	2.0
	Others	30.5
	Total	100
Slovenia	Pop TV	N/A
	TVS 1	N/A
	Kanal A	N/A
	TVS 2	N/A
	Total	100

Albania*Notes:*

This rating is the most recent one, and it comes from a survey conducted in September 2002. The sample did not include the whole country, but only the 14 districts with the largest population. Each member of the surveyed families kept a diary of the TV programmes watched throughout the day, for the whole month of September. The survey was not exhaustive, given its geographical limitation, and therefore did not include all the TV channels covering Albanian territory. However, it provides the only rating done in Albania in the last two years.

Sources:

Media 2002, report by the Institute of Survey and Opinions

Bosnia and Herzegovina*Notes:*

The total exceeds 100% because the quoted survey covers average daily reach – percentage of people who watched TV stations available in Bosnia and Herzegovina at least 15 minutes during the day.

Source:

PRISM Research Sarajevo

Bulgaria*Notes:*

¹ This option is included here because it appears in the majority of polls.

Sources:

National Public Opinion Centre (under the National Assembly), opinion polls, November 2002

Croatia**Sources:**

GFK, tvTREND, 2002

Hungary**Notes:**

Data available for the first six months of 2003.

Sources:

National Radio and Television Commission

Macedonia**Sources:**

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Moldova**Notes:**

The respondents in the above-mentioned IMAS opinion poll were asked the following question: "What TV channels do you watch most frequently?" The answers were organized in a table showing the percentage of viewers choosing a certain station as "First mention," "Second mention," and "Third mention." A "Total" column was provided at the end of the table, summing up the percentages in the previous three columns. The figures in the last column were used to rank the popularity of the stations. In order to provide information about the popularity of stations only in comparative terms, the percentages from the "First mention" column are shown here, which add up to 99.9% (the best there is). Since the table contains also foreign stations available in Moldova, but which have no local inserts, only the domestic ones and the foreign ones with local inserts have been selected, as these are of interest to the present survey. The others have been included under "Others."

Sources:

The opinion poll was conducted by the IMAS-Inc. (Marketing and Polling Institute) in November 2002. IMAS was commissioned for this purpose by the Independent Journalism Center, and the poll was funded by the Soros Foundation Moldova. IMAS has been conducting such polls regularly for several years now. It is difficult to assess the reliability of this poll, but IMAS seems to have a good reputation.

Montenegro**Notes:**

These data are from a survey ordered by Montenegro Media Institute and conducted by the Strategic Marketing & Media Research Institute Group (SMMRI Group / www.smmri.com): a network of privately owned research institutes located in Belgrade (FR of Yugoslavia/Serbia), Podgorica (FRY/Montenegro), Skopje (Macedonia) and Brcko (Bosnia and Herzegovina), as well as AGB SR, a TV Audience Measurement (TAM) company established as a joint venture of AGB Holding, the world's leading TAM operator, and SMMRI. At present, SMMRI is the largest research company in the region by total number of surveys, interviews, and clients. SMMRI experts follow the highest professional ESOMAR and ISI (International Statistical Institute) standards of survey design, data collection, processing, and analysis.

Sample: 1,463, population aged 15+; diary method; period of research: 9-15 September 2002.

Sources:

MMI research conducted by Strategic Marketing (SMMRI), September 2002

Romania**Notes:**

Data available for November 19-25, 2001, only for the urban population, +200,000 inhabitants.

Sources:

AGB Data Research

Serbia**Notes:**

Data for Serbia excluding Kosovo.

Data for December 2002.

Sources:

Strategic Marketing and Media Research Institute

Slovenia**Notes:**

This is a list of TV stations with the highest share, but no precise figures are available publicly.

IV. Radio

IV. 1. Radio companies: registration, coverage and ownership

IV.1. 1. Total radio companies

	Bosnia and										Slovenia
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	
Number of radio broadcasters	[34]	151	N/A	137	133	101	25	40	N/A ¹	[459]	75
Registered radio broadcasters	[34]	151	114	137	133	101	25 ¹	40	128	[459]	75
With national coverage license	[3]	N/A	2	4	4	4	3	4	N/A ²	[5]	4
With local coverage license	[31]	N/A	112	133	129	97	23	36	N/A	[454]	71
In the capital city only	[12]	N/A	11	3	18	22	14	2	N/A	[37]	10

IV.1. 2. Public radio companies

	Bosnia and										Slovenia
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	
Number of radio broadcasters	[4]	68	18	1	12	30	5	14	N/A	[95]	2
Registered radio broadcasters	[4]	68	18	1	12	30	5	14	N/A	[95]	2
With national coverage license	[1]	N/A	1	1	1	1	2 ²	1	N/A	[3]	1
With local coverage license	[3]	N/A	17	0	11 ¹	29	3	13	N/A	[92]	1
In the capital city only	[0]	N/A	5	0	3	1	0	0	N/A	[1]	0

IV.1. 3. Private radio companies

	Bosnia and										Slovenia
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	
Number of radio broadcasters	[30]	83	N/A	136	121	71	20	26	N/A	[364]	73
Registered radio broadcasters	[30]	83	96	136	121	71	20	26	N/A	[364]	73
With national coverage license	[2]	N/A	1	3	3	3	1 ³	3	N/A	[2]	3
With local coverage license	[28]	N/A	95	133	118	68	20	23	N/A	[362]	70
In the capital city only	[12]	N/A	6	3	15	21	14	2	N/A	[36]	10

Albania

Notes:

The last row of the tables, indicating the number of registered radio broadcasters in the capital city only, is based on location of radio headquarters, excluding the national radio broadcasters – which of course have their headquarters in the capital but have been omitted here considering their national coverage. Also, since the registered radio broadcasters in the capital possess a local license, they also qualify in the category of broadcasters with local coverage license.

The data in these tables originate from *Monitoring Albanian Media Landscape 2002* rather than from the official website of the NCRT, since the list of licensed subjects on the website includes many radio broadcasters which have stopped broadcasting in the past two years, as well as broadcasters which started out in 2003. Therefore it was considered more realistic to use the figures from this report even though it is not an official one.

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

Data on the number of radio broadcasters with national and local coverage license are not available yet.

Source:

Communications Regulatory Agency – CRA

Bulgaria

Notes:

Data available on registered broadcasters only.

Sources:

Council for Electronic Media

Communications Regulation Commission

Croatia

Notes:

Croatian Radio Television (HRT) is the only public radio (and television) company in the Republic of Croatia, and it has three national and eight regional radio stations. All other radio stations in the Republic of Croatia are independent companies.

Sources:

Council for Radio and Television

Croatian Institute of Telecommunication

Law on Electronic Media (September 2003)

Hungary

Notes:

¹ This number includes 11 non-profit radio broadcasters.

Sources:

National Radio and Television Commission, Annual Report

Macedonia

Notes:

The public service – National Macedonian Radio (within MRTV) – has three channels. That is why the number of radio broadcasters (101) differs from the number of radio channels (103): National Macedonian Radio is registered as one broadcaster but with three different channels.

Sources:

Broadcasting Council of the Republic of Macedonia

Moldova

Notes:

¹ Among the total number of radio stations there are three which are broadcast by wire. In the former Soviet Union there was a system of wire radio, covering almost all of the households and requiring minimal equipment for listening – a loudspeaker and a volume control. Since 1989 the wire network has fallen into disarray, but in some communities it is still functional and is used by local stations.

² The public ones are the National Radio and the Chisinau City's station Antena C, which claims to cover 2/3 of Moldova's territory.

³ The private broadcaster is the religious The Little Samaritan, which has stations in 13 locations across the country.

Sources:

Broadcasting Coordinating Council registry of licensees, as of 15 April 2002.

Montenegro

Sources:

Broadcasting Agency

Romania

Notes:

¹ There are many unlicensed radio stations, and it is difficult to estimate their number and scope of illegal activity.

² Registered radio broadcasters operate in all counties (41), in 113 localities.

Sources:

The National Council of Broadcasting (CNA), www.cna.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

Due to the chaotic situation in the broadcasting sphere, it may happen that several programmes use the same frequency, trying to oust one another by amplifying transmitter power despite both technical conditions and international standards.

On "Number of radio broadcasters" data: only the broadcasters registered in the *Media Guidebook* are listed here. However, it is estimated that they are far more numerous – around 800.

On "Registered radio broadcasters" data: a moratorium on frequencies is in force and only the state RTS is licensed to operate. All other broadcasters are awaiting legalization. Some have obtained temporary licenses, while numerous others are unlicensed but operating.

On "With local coverage licence" data: including regional stations.

On "In the capital city only" data: Only stations audible in Belgrade only, excluding those which are based in Belgrade but are audible far beyond the metropolitan area.

Sources:

Strategic Marketing and Media Research Institute

Media Center, Belgrade

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Media Register, Serbian Government

Slovenia

Sources:

Ministry of Culture and Broadcasting Council

IV. 2. Radio stations: registration, coverage and ownership

IV. 2. 1. Total radio stations

	Bosnia and										Slovenia
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	
Number of radio stations	[34]	151	N/A	147	160	103	25	41	N/A	[466]	85
Registered radio stations	[34]	151	303	147	160	103	25	41	308	[466]	85
National radio stations	[3]	N/A	3	6	5	6	3	5	N/A	[11]	7
Local radio stations	[31]	N/A	300	141	155 ¹	97	23	36	N/A	[455]	78
In the capital city only	[12]	N/A	11	3	18	24	14	2	N/A	[40]	10

IV. 2. 2. Public radio stations

	Bosnia and										Slovenia
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	
Number of radio stations	[4]	68	185	11	23	32	5	15	N/A	[99]	8
Registered radio stations	[4]	68	185	11	23	32	5	15	N/A	[99]	8
National radio stations	[1]	N/A	2	3	3 ²	3	2	2	N/A	[9]	4
Local radio stations	[3]	N/A	183	8	20	29	3	13	N/A	[90]	4
In the capital city only	[0]	N/A	5	0	3	3	0	0	N/A	[4]	0

IV. 2. 3. Private radio stations

	Bosnia and										Slovenia
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	
Number of radio stations	[30]	83	N/A	136	137	71	20	26	N/A	[367]	77
Registered radio stations	[30]	83	118	136	137	71	20	26	N/A	[367]	77
National radio stations	[2]	N/A	1	3	2	3	1	3	N/A	[2]	3
Local radio stations	[28]	N/A	117	133	135	68	20	23	N/A	[365]	74
In the capital city only	[12]	N/A	6	3	15	21	14	2	N/A	[36]	10

Albania

Notes:

The last row of the tables, indicating the number of registered radio stations in the capital city only, is based on location of radio headquarters, excluding the national radio stations – which of course have their headquarters in the capital but have been omitted here considering their national coverage. Also, since the registered radio stations in the capital possess a local license, they also qualify in the category of local radio stations.

The data in these tables originate from *Monitoring Albanian Media Landscape 2002* rather than from the official website of the NCRT, since the list of licensed subjects on the website includes many radio stations which have stopped broadcasting in the past two years, as well as radio stations launched in 2003. Therefore it was considered more realistic to use the figures from this report even though it is not an official one.

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Source:

Communications Regulatory Agency – CRA

Bulgaria

Notes:

Data available on registered radio stations only.

Sources:

Council for Electronic Media
Communications Regulation Commission

Croatia

Notes:

Croatia has 17 private and eight public radio stations broadcasting on the regional level. In Table 12 those regional stations are included in the number of local radio stations.

Sources:

Council for Radio and Television
Croatian Institute of Telecommunication
Law on Electronic Media (September 2003)

Hungary

Notes:

¹ This number includes 118 local radio stations, nine regional radio stations of the Hungarian Radio, and 22 other regional radio stations. There is one radio station with a license to operate by satellite and eight cable stations – all included in the number of local stations.

² The Hungarian Radio has three national stations (channels): Kossuth Rádió, Petőfi Rádió, Bartók Rádió.

Sources:

National Radio and Television Commission

Macedonia

Sources:

Broadcasting Council of the Republic of Macedonia

Moldova

Notes:

The notions of "local/national broadcaster" and "local/national station" coincide in the case of Moldova. Hence the numbers are the same in IV.1. and IV.2.

Montenegro

Sources:

Broadcasting Agency

Romania

Sources:

The National Council of Broadcasting (CNA), www.cna.ro

Serbia

Notes:

Data for Serbia excluding Kosovo.

The data given here are based on two specific surveys, conducted by the Strategic Marketing and Media Research Institute and the Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia, as well as on available documents such as the Serbian Government's Media Register. However, radio audience surveys show that over 70 stations are receivable in Belgrade, although they do not specify the stations in question.

Sources:

Strategic Marketing and Media Research Institute
Media Center, Belgrade
Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia
Media Register, Serbian Government

Slovenia

Sources:

Ministry of Culture and Broadcasting Council

IV. 3. Radio programming by content

IV. 3. 1. Radio stations - total

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest radio stations	[33]	N/A	45	140	N/A	N/A	N/A	38	N/A	[376]	N/A
B. Specialized radio stations	[1]	N/A	69	7	N/A	N/A	N/A	3	N/A	[90]	N/A
B.1. Music	[1]	N/A	61	3	N/A	N/A	N/A	2	N/A	[86]	N/A
B.2. Political, social, business news and commentaries	0	N/A	1	0	N/A	N/A	N/A	0	N/A	[1]	N/A
B.3. Sport	0	N/A	2	1	N/A	N/A	N/A	0	N/A	[3]	N/A
B.4. Other	0	N/A	5	3 ¹	N/A	N/A	N/A	1	N/A	N/A	N/A
C. Total (A+B)	[34]	N/A	114	147	N/A	N/A	N/A	41	N/A	[466]	N/A

IV. 3. 2. Radio stations - public

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest radio stations	[4]	N/A	23	10	N/A	N/A	N/A	15	N/A	[96]	N/A
B. Specialized radio stations	0	N/A	8	1	N/A	N/A	N/A	0	N/A	[3]	N/A
B.1. Music	0	N/A	6	1	N/A	N/A	N/A	0	N/A	[2]	N/A
B.2. Political, social, business news and commentaries	0	N/A	0	0	N/A	N/A	N/A	0	N/A	[1]	N/A
B.3. Sport	0	N/A	0	0	N/A	N/A	N/A	0	N/A	[0]	N/A
B.4. Other	0	N/A	2	0	N/A	N/A	N/A	0	N/A	N/A	N/A
C. Total (A+B)	[4]	N/A	31	11	N/A	N/A	N/A	15	N/A	[99]	N/A

IV. 3. 3. Radio stations - private

	Bosnia and Herzegovina										
	Albania	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia	
A. General interest radio stations	[29]	22	130	N/A	N/A	N/A	23	N/A	[280]	N/A	N/A
B. Specialized radio stations	[1]	61	6	N/A	N/A	N/A	3	N/A	[87]	N/A	N/A
B.1. Music	[1]	55	2	N/A	N/A	N/A	2	N/A	[84]	N/A	N/A
B.2. Political, social, business news and commentaries	0	1	0	N/A	N/A	N/A	0	N/A	[0]	N/A	N/A
B.3. Sport	0	2	1	N/A	N/A	N/A	0	N/A	[3]	N/A	N/A
B.4. Other	0	3	3 ¹	N/A	N/A	N/A	1	N/A	N/A	N/A	N/A
C. Total (A+B)	[30]	83	136	N/A	N/A	N/A	26	N/A	[367]	N/A	N/A

IV. 3. 4. Broadcasting time (hours) per day

	Bosnia and Herzegovina										
	Albania	Bulgaria	Croatia*	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia	
A. General interest radio stations	[627.5]	741.5	3 360	N/A	N/A	N/A	N/A	N/A	[9 024]	N/A	N/A
B. Specialized radio stations	[24]	1 509	168	N/A	N/A	N/A	N/A	N/A	[2 149]	N/A	N/A
B.1. Music	[24]	1 325	72	N/A	N/A	N/A	N/A	N/A	[2 064]	N/A	N/A
B.2. Political, social, business news and commentaries	0	24	0	N/A	N/A	N/A	0	N/A	[24]	N/A	N/A
B.3. Sport	0	48	24	N/A	N/A	N/A	0	N/A	[61]	N/A	N/A
B.4. Other	0	112	72	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
C. Total (A+B)	[651.5]	2 250.5	3 528	N/A	N/A	N/A	N/A	N/A	[11 173]	N/A	N/A

IV. 3. 5. Total broadcasting time (hours) in 2002

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
A. General interest radio stations	[229 037.5]	N/A	270 647.5	1 226 400	N/A	N/A	N/A	N/A	N/A	[3 293 760]	N/A
B. Specialized radio stations	[8 760]	N/A	550 785	61 320	N/A	N/A	N/A	N/A	N/A	[784 385]	N/A
B.1. Music	[8 760]	N/A	483 625	26 280	N/A	N/A	N/A	N/A	N/A	[753 360]	N/A
B.2. Political, social, business news and commentaries	0	N/A	8 760	0	N/A	N/A	N/A	0	N/A	[8 760]	N/A
B.3. Sport	0	N/A	17 520	8 760	N/A	N/A	N/A	0	N/A	[22 265]	N/A
B.4. Other	0	N/A	40 880	26 280	N/A	N/A	N/A	N/A	N/A	N/A	N/A
C. Total (A+B)	[237 797.5]	N/A	821 432.5	1 287 720	N/A	N/A	N/A	N/A	N/A	[4 078 145]	N/A

Albania

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

There are no official data on the general broadcasting time (hours in year 2002) for TV and radio stations registered in Bosnia and Herzegovina.

Bulgaria

Notes:

Data are available on 114 radio stations only, therefore all figures on "general broadcasting time" are estimates.

Sources:

Council for Electronic Media

Communications Regulation Commission

Croatia

Notes:

¹ All three private radio stations in section B.4. are noncommercial. Two of them, Radio Marija and Croatian Catholic Radio, are religiously oriented. The third, Radio Student, is a student-run radio station in the Faculty of Political Science (Department of Journalism), University of Zagreb.

Sources:

Council for Radio and Television

Croatian Institute of Telecommunication

Law on Electronic Media (September 2003)

* Editor's note:

Numbers have been calculated by using radio stations' daily broadcasting time data, offered by the contributor.

Moldova

Notes:

See notes to III.5., i.e. no data are available on broadcasting times and origins of programmes.

Montenegro

Notes:

No data are available on the broadcasting time of radio stations.

Sources:

Republic Statistical Department

Romania

Notes:

Such information is not available.

Serbia

Notes:

Data for Serbia excluding Kosovo.

Sources:

Strategic Marketing and Media Research Institute

Media Center, Belgrade

Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia

Media Register, the Serbian Government

IV. 4. Broadcasting time by origin of programme (hours in year 2002)

	Albania	Bosnia and Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Own products - total	[144 302.75]	N/A	N/A	N/A	N/A	N/A	N/A	172 289 ¹	N/A	N/A	N/A
Own products - average per channel	[4 654.9]	N/A	N/A	N/A	N/A	N/A	N/A	5 557 ¹	N/A	N/A	N/A
Imported products - total	[43 102.85]	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Imported products - average per channel	[1 390.4]	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
External products - total	[110 566.75]	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
External products - average per channel	[340.86]	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Albania

Notes:

The figures distinguishing between "imported products" and "external products" originate from the *Monitoring Albanian Media Landscape 2002* report; however, they must be taken with some reservation, as there is a sizeable quantity of programmes which are foreign but have not been bought by the stations because the copyright law is not properly enforced.

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

There are no official data on the broadcasting time by origin of programme (hours in year 2002) for TV and radio stations registered in Bosnia and Herzegovina.

Bulgaria

Notes:

No data available.

Croatia

Notes:

There are no accurate and specific data on these issues, but some assumptions can be made on the basis of the legal provisions in the Law on Electronic Media, which stipulate that at least 20% of the daily radio broadcasting time should be devoted to Croatian music. Own productions should account for at least 30% of the daily broadcasting time (any possible reruns must be clearly indicated as such).

Sources:

Council for Radio and Television

Croatian Institute of Telecommunication

Law on Electronic Media (September 2003)

Moldova

Notes:

See notes to III.5., i.e. no data are available on broadcasting times and origins of programmes.

Montenegro

Notes:

¹ The Republic Statistical Department does not provide data on all radio stations in Montenegro. These data refer only to thirty-one (31) radio stations. (No data are available on ten radio stations.)

Sources:

Republic Statistical Department

Romania

Notes:

Such information is not available.

Serbia

Notes:

Exact data are impossible to obtain. According to the relevant legislation, a radio station is obliged to broadcast own programmes at least 20% of its total transmission time. However, the law has not been enforced to date.

Sources:

Media Center, Belgrade

IV. 5. Domestic radio broadcasting in languages other than the official one

Country	Name of programme in language other than the official one	Radio station	Language	Average broadcasting time of programme (hours) per day	Ownership
Albania	All programmes	Radio Prespa	Macedonian	[14]	Llazi Nikolla [person, local]
	Newscasts	Radio Tirana	English, Italian, German, Serbo-Croatian, etc.	[3]	Public

Bosnia and Herzegovina

There are no domestic radio stations with programmes in languages other than the official ones.

Bulgaria	Radio Bulgaria	Bulgarian National Radio	Russian	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	English	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	French	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	German	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	Spanish	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	Serbian	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	Greek	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	Albanian	[5]	Public
	Radio Bulgaria	Bulgarian National Radio	Turkish	[5]	Public
	Croatia	News	HRT2	English	3
	Traffic conditions	HRT2	English, German, Italian	1	Public
Hungary	Radio Budapest	Radio Budapest	English	0.5	Hungarian Radio, state-owned
	Radio Budapest	Radio Budapest	Russian	0.5	Hungarian Radio, state-owned
	Radio Budapest	Radio Budapest	Spanish	0.5	Hungarian Radio, state-owned
	Radio Budapest	Radio Budapest	French	0.5	Hungarian Radio, state-owned
	Radio Budapest	Radio Budapest	Italian	0.5	Hungarian Radio, state-owned
	Radio Budapest	Radio Budapest	German	0.5	Hungarian Radio, state-owned
	Minority programme	Hungarian Radio, national broadcast	Ruthenian	0.07 ¹	Hungarian Radio, state-owned

Country	Name of programme in language other than the official one	Radio station	Language	Average broadcasting time of programme (hours) per day	Ownership
Hungary (cont.)	Minority programme	Hungarian Radio, national broadcast	Bulgarian	0.07 ¹	Hungarian Radio, state-owned
	Minority programme	Hungarian Radio, national broadcast	Greek	0.07 ¹	Hungarian Radio, state-owned
	Minority program	Hungarian Radio, national broadcast	Ukrainian	0.07 ¹	Hungarian Radio, state-owned
	Minority programme	Hungarian Radio, national broadcast	Armenian	0.07 ¹	Hungarian Radio, state-owned
	Minority program	Hungarian Radio, national broadcast	Polish	0.07 ¹	Hungarian Radio, state-owned
	Na maternjem jeziku	Hungarian Radio, national broadcast	Serbian	0.07 ¹	Hungarian Radio, state-owned
	V materinskom jazyku	Hungarian Radio, national broadcast	Slovakian	0.07 ¹	Hungarian Radio, state-owned
	Na materinjem jeziku	Hungarian Radio, national broadcast	Croatian	0.07 ¹	Hungarian Radio, state-owned
	In der Muttersprache	Hungarian Radio, national broadcast	German	0.07 ¹	Hungarian Radio, state-owned
	In limba materna	Hungarian Radio, national broadcast	Romanian	0.07 ¹	Hungarian Radio, state-owned
	Minority program	Regional studios of the Hungarian Radio – Szeged, Pécs, Miskolc	Slovakian	1.7	Hungarian Radio, state-owned
	In limba materna	Regional studio of the Hungarian Radio – Szeged	Romanian	0.5	Hungarian Radio, state-owned
	Na maternjem jeziku	Regional studios of the Hungarian Radio – Pécs, Szeged	Serbian	0.5	Hungarian Radio, state-owned
	Na materinjem jeziku	Regional studios of the Hungarian Radio – Pécs	Croatian	0.5	Hungarian Radio, state-owned
	In der Muttersprache	Regional studios of the Hungarian Radio – Pécs	German	0.5	Hungarian Radio, state-owned
	Chaci Vorba (True Word)	Radio C	Romany	1.2	Rádió C Kisebbségi Műsorszolgáltató Kft. (non-profit radio in Budapest)

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Country	Name of programme in language other than the official one	Radio station	Language	Average broadcasting time of programme (hours) per day	Ownership
Macedonia	All programmes	Radio Vat	Albanian	18	Private
	All programmes	Radio Aracina	Albanian	18	Private
	All programmes	Radio Rumeli	Turkish	14	Private
	N/A	Radio Tetovo	Albanian	N/A	Public
	All programmes	Radio Aljbana	Albanian	11	Private
	N/A	Radio Temipe	Roma	7	Private
	N/A	Radio Cerenja	Roma	5	Private
Moldova	N/A	N/A	N/A	N/A	N/A
Montenegro	Flash News ¹	Radio Crne Gore	Albanian	0.07 ¹	Public
	News broadcast in Albanian language ¹	Radio Crne Gore	Albanian	0.42 ¹	Public
	N/A	Radio Mir ²	Albanian	N/A	Private
Romania	Special programme for Hungarian minority	Public Radio Station	Hungarian	N/A	State owned
Serbia	All programmes	Radio Bačka Palanka	Slovak	24	Public
	All programmes	Radio Toni	Albanian	24	Private
	All programmes	Radio Kikinda	Hungarian	24	Public
	All programmes	Glas Roma	Romany	24	Public
	All programmes	Radio Bečej	Hungarian	22	Public
	N/A	Radio Novi Sad	Hungarian, Romany, Romanian, Ruthenian, Slovak, Ukrainian	39.5	Public
	Romany them	Radio Beograd	Romany	0.5	Public
Slovenia	N/A	Mariborski radio študent – MARŠ	Slovenian, languages of minorities	24	Private
	N/A	Radio Capodistria	Italian	18	Public
	N/A	Radio Murski val	Romany	N/A	Private
	N/A	Radio Slovenia international	Slovenian, English, German, Hungarian, Italian, Croatian	24	Public
	N/A	Radio študent	Slovenian, others	24	Private
	N/A	Radio Tartini	Slovenian, Italian, English	24	Private

Albania

Notes:

Radio Prespa is in the area bordering Macedonia, and it is owned by and targets Macedonians living in Albania. The public Radio Tirana has a special service with newscasts in several languages.

Sources:

Monitoring Albanian Media Landscape 2002

Bulgaria

Notes:

Radio Bulgaria's general broadcasting time is 55 hours/day.

Sources:

Bulgarian National Radio

Croatia

Notes:

Especially during the summer season, when the number of tourists grows, many radio stations broadcast programmes in different languages (mainly German, Italian, English, etc.). The majority of those programmes are newscasts, weather forecasts and programmes about traffic conditions. As there are no strict or specific legal regulations concerning those issues, detailed information about such programmes is not available.

Sources:

Council for Radio and Television
Croatian Institute of Telecommunication
Law on Electronic Media (September 2003)

Hungary

Notes:

The Hungarian Radio operates a foreign language service under the name Radio Budapest that has daily broadcasts in six languages, as listed above. Each broadcast has a different programme structure, but they all contain news and magazine elements.

Also, the Hungarian Radio has five 30-minute programmes per day in minority languages nationwide (Kossuth Rádió).

Apart from that, almost all the nine regional studios of the Hungarian Radio have a 30-minute daily programme either in one or in several minority languages, depending on the ethnic minorities living in the covered area.

These programmes are listed in the table, but there are no available data about similar programmes offered by other regional or city radio stations.

¹ 0,5 hours/week

Sources:

Magyar Rádió (Hungarian Radio), Rádió C

Macedonia

Sources:

Broadcasting Council of the Republic of Macedonia

Montenegro

Notes:

¹ Six times a week.

² No data on broadcasting time available.

The national radio channel (Radio Crne Gore) has "Flash News" and "News Broadcast" in Albanian. One private radio station (Radio Mir) has mixed programmes in Albanian and Serbian.

Sources:

Republic Statistical Department

Romania

Notes:

According to AZMR, there are private Hungarian-language stations in approximately 14 towns in Western Romania, but details are not available.

Sources:

Hungarian Journalists Association (AZMR)

Serbia

Notes:

Data for Serbia excluding Kosovo.

Although Hungarian and Albanian, in addition to Serbian, are used as official languages in parts of Serbia where there is a Hungarian or an Albanian majority, the programmes broadcast in their respective languages are treated as national minority programmes and are therefore included in this table.

There are numerous other radio stations broadcasting in minority languages around the clock or on an individual programme basis, but all cannot be listed here.

Sources:

Strategic Marketing and Media Research Institute
Media Center, Belgrade
Yugoslav Media Guidebook, Agency for Media Research and Public Relations of the Federal Republic of Yugoslavia
Media Register, Serbian Government

Slovenia

Sources:

Ministry of Culture and Broadcasting Council

IV. 6. Radio-stations' share of listening time (%)

Country	Name	%
Albania	N/A	N/A
Bosnia and Herzegovina	BH Radio	16.6
	BN	3.9
	Federalni	2.3
	HRTV Mostar	2.2
	Radio Republike Srpske	2.0
	Big	1.9
	Kalman	1.8
	Av az	1.5
	Nes	1.5
	BM (Bosnjacko Muslimanski)	1.4
	M	1.3
	Mir Medjugorje	1.3
	Srpsko Sarajevo	1.3
	Liv no	1.2
	Herceg Bosna	1.2
	Split	1.1
	Dobre vibracije	1.0
	Other	44.8
	Total	88.3
Bulgaria	Horizont	37.3
	Dark	6.9
	Vesselin	5.6
	FM+	2.3
	BG Radio	2.1
	Fresh	1.9
	Radio Stara Zagora	0.8
	Hristo Botev	0.7
	Svobodna Evropa (Radio Free Europe)	0.7
	Express	0.7
	Others	21.0
	Don't listen to the radio	20.0 ¹
	Total	100
Croatia	Narodni Radio	19.24
	HR1	17.12
	Otvoreni	12.02
	Obiteljski	7.46
	HR2	6.63
	Radio Sljeme	6.13
	Radio Split	5.51
	Radio Rijeka	5.01
	Radio 101	4.77
	Radio Dalmacija	4.23
	Total	88.12 ¹

Country	Name	%
Hungary	Danubius Rádió	25.7
	Sláger Rádió	22.6
	Kossuth Rádió	14.2
	Petőfi Rádió	8.1
	Juventus Rádió	7.2
	Roxy Rádió	2.0
	Info Rádió	0.9
	Others	19.3
	Total	100
Macedonia	Radio Antena 5	13.0
	Radio Kanal 77	12.9
	Radio Ros	5.8
	Radio Tetovo	5.4
	Makedonsko radio 1	4.2
	Others	58.7
	Total	100
Moldova	Radio Moldova (National Radio)	40.9
	Russkoe Radio	17.0
	Antena C	13.5
	HIT FM	9.7
	Radio FM	2.7
	The Little Samaritan	2.1
	Radio Nova	1.2
	Serebryannyi Dozhd'	0.8
	Shanson	0.8
	Dinamit FM	0.7
	Nashe Radio	0.5
	Pro FM	0.5
	Europa FM	0.3
	Vocea Basarabiei	0.1
	Others	9.3
Total	100	
Montenegro	Radio Elmag	24.1
	Radio Crne Gore	12.2
	Radio D	6.3
	Radio 98	4.0
	Radio Montena	2.1
	Radio Antena M	2.0
	Radio 3	1.0
	Radio Free Montenegro	0.8
	Radio Gorica	0.5
	Foreign stations	1.0
	Others	46.0
	Total	100
Romania	Public Radio, first channel	26.4
	Europa FM	15.7
	Pro FM	8.6
	Contact	5.7
	Radio 21	4.3
	Radio Star	1.3
	Tineret	0.6

Country	Name	%
Romania (cont.)	Cultural	0.4
	Antena Satelor	0.4
	Others	36.6
	Total	100
Serbia	Radio Beograd 1	7.6
	B92	3.3
	Radio S	2.9
	Beograd 202	2.1
	Others	84.1
	Total	100
Slovenia	N/A	N/A
	Total	100

Albania

Notes:

There are no data on this issue – either official or from any other organization, institution, poll agency, or the media themselves.

Sources:

Albanian Media Institute

Bosnia and Herzegovina

Notes:

The total does not add up to 100%, because the quoted survey covers average daily reach – percentage of people who listened to the radio stations available in Bosnia and Herzegovina at least 15 minutes during the day.

Source:

PRISM Research Sarajevo

Bulgaria

Notes:

¹ This option is included here because it is offered in the majority of polls.

Sources:

National Public Opinion Centre for Opinion Polls (under the National Assembly), opinion polls, November 2002

Croatia

¹ The list includes the top ten radio stations, which account for 88.12% of the total listening time.

Sources:

MEDIAMETAR, Independent Research Center

Hungary

Notes:

Data available for the first six months of 2003.

Sources:

National Radio and Television Commission

Macedonia

Sources:

Strategic Marketing & Media Research Institute-Skopje, Macedonia

Moldova

Notes:

The same IMAS poll as for TV has been used here; it covered both TV and radio consumption habits. The respondents were asked the following question: "What radio stations do you listen to most frequently?" The same methodology for shares has been used as in the case of TV, as the data in the poll results were organized in the same way. The "First mention" column for radio stations add up to 100.1% in the poll results.

Sources:

IMAS-Inc. poll of November 2002.

Montenegro

Notes:

MMI research conducted by Strategic Marketing (SMMRI). Sample: 1,444, population aged 15+; diary method; period of research: 9-15 September 2002.

Sources:

MMI research conducted by Strategic Marketing (SMMRI)

Romania

Notes:

Data for September 30 - October 27, 2002.

Sources:

Institute for Marketing and Polls (IMAS) – AUDIMAS

Serbia

Notes:

Data for Serbia excluding Kosovo.

The data above were obtained in a November 2002 survey. At that time, the estimated number of radio stations was about 600, which resulted in extreme fragmentation – consequently, the share of listening time of the fifth-ranked station was less than 2%, and even less than 1% for the stations ranked seventh and eighth. The most recent data reveal even greater fragmentation.

Sources:

Strategic Marketing and Media Research Institute

Slovenia

Notes:

No official data are available.

V. Media Economy

V. 1. Share of media revenues

V. 1. 1. Total media revenue

Country	Total revenue	from sales		from advertising		from sponsoring	
	EUR	EUR	%	EUR	%	EUR	%
Albania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	[30 000 000] ¹	N/A	[10] ¹	N/A	[80] ¹	N/A	[10] ¹
Bulgaria	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Croatia	N/A	N/A	N/A	30 789 802	N/A	N/A	N/A
Hungary	N/A	N/A	N/A	620 392 000	100	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Romania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Serbia	N/A	N/A	N/A	[44 500 000]	N/A	N/A	N/A
Slovenia	N/A	N/A	N/A	N/A	N/A	N/A	N/A

V. 1. 2. Print media revenue

Country	Total revenue	from sales		from advertising		from sponsoring	
	EUR	EUR	%	EUR	%	EUR	%
Albania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	N/A	N/A	N/A	N/A	[6] ¹	N/A	N/A
Bulgaria	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Croatia	N/A	N/A	N/A	N/A	24.45	N/A	N/A
Hungary	N/A	N/A	N/A	226 249 000	36.5	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Romania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Serbia	N/A	[72 000 000]	N/A	[6 000 000]	N/A	N/A	N/A
Slovenia	N/A	N/A	N/A	N/A	N/A	N/A	N/A

V. 1. 2. 1. Newspapers revenue

Country	Total revenue	from sales		from advertising		from sponsoring	
	EUR	EUR	%	EUR	%	EUR	%
Albania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bulgaria	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Croatia	N/A	N/A	N/A	N/A	13	N/A	N/A
Hungary	N/A	N/A	N/A	113 983 000	18.4	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Romania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Serbia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Slovenia	N/A	N/A	N/A	N/A	N/A	N/A	N/A

V. 1. 2. 2. Magazines revenue

Country	Total revenue	from sales		from advertising		from sponsoring	
	EUR	EUR	%	EUR	%	EUR	%
Albania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bulgaria	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Croatia	N/A	N/A	N/A	N/A	11.45	N/A	N/A
Hungary	N/A	N/A	N/A	112 266 000	18.1	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Romania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Serbia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Slovenia	N/A	N/A	N/A	N/A	N/A	N/A	N/A

V. 1. 3. Television stations revenue

Country	Total revenue	from sales		from advertising		from sponsoring	
	EUR	EUR	%	EUR	%	EUR	%
Albania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	N/A	N/A	N/A	N/A	65 ¹	N/A	N/A
Bulgaria	40 392 059	N/A	N/A	36 756 773	91	N/A	N/A
Croatia	N/A	N/A	N/A	N/A	68.35	N/A	N/A
Hungary	N/A	N/A	N/A	274 067 000	44.2	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Romania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Serbia	N/A	N/A	N/A	[36 000 000]	N/A	N/A	N/A
Slovenia	N/A	N/A	N/A	N/A	N/A	N/A	N/A

V. 1. 4. Radio stations revenue

Country	Total revenue	from sales		from advertising		from sponsoring	
	EUR	EUR	%	EUR	%	EUR	%
Albania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	N/A	N/A	N/A	N/A	[6] ¹	N/A	N/A
Bulgaria	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Croatia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Hungary	N/A	N/A	N/A	41 643 000	6.7	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Romania	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Serbia	N/A	N/A	N/A	[2 500 000]	N/A	N/A	N/A
Slovenia	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Albania

Notes:

Such data are not accessible at government sources, as they are considered secret, whereas the media companies themselves are even more secretive in this respect.

Sources:

Albanian Media Institute

Bosnia and Herzegovina

Notes:

Advertising constitutes 80% to 90% of the financing for commercial media, with the remaining minor revenue sources derived from donations and subscriptions. The market grossed 60 million KM (convertible mark) (approximately \$33 million) in 2002, or twice as much as the previous year. On the whole, the advertising market is expected to grow 35% yearly. Television receives 65% of the market, outdoor advertising 25%, and radio and print media 6% to 7%.

Sources:

¹ Media Sustainability Index 2002 (MSI) Irex ProMedia

Bulgaria

Sources:

Communications Regulation Commission Annual Report, 2002

Croatia

Notes:

Data for radio are not available.

Sources:

Mediana Fides Research Agency

Hungary

Notes:

Data for 2002 are available only about advertising revenues.

Sources:

Mediagnozis, 2003

Moldova

Notes:

No economic data are available. First, as mentioned above, the media seem to fall by the wayside of official statistics and the economy in general. This, however, can be explained by the fact that a negligible number of media outlets – both print and broadcast – make any money at all out of their operation; they are usually backed by political or economic interests. This is due to the extremely low purchasing power of the population and, hence, the weak advertising market. Secondly, data are not available because Moldova is dominated by an atmosphere of secrecy and suspicion even when it comes to public information, let alone data on private "businesses" such as the media. And given political or economic interests behind the bulk of the media outlets, those sponsors are usually reluctant to reveal their roles on the media scene.

Montenegro

Notes:

No data available.

Romania

Notes:

Such data are not available for the Romanian media. According to the Media Sustainability Index (MSI), 2002: "Overall, Romanian media are not profit-generating businesses. In an overcrowded market, with a public that has little buying power, media outlets struggle to survive. Media owners with other businesses use funds from other ventures to keep their media operations afloat. Most of the local newspapers are not economically viable, but businessmen sustain them as tools to facilitate business deals, especially when public money is involved. Many local politicians set up newspapers to improve their image. These publications are rarely read and carry very little weight with a suspicious public. As subscriptions account for just a small part of newspaper circulation, newspapers cannot count on steady sales revenue from that source. To boost subscription rates, newspapers offer big discounts, which further cripple overall sales revenue.

"The advertising market has declined along with the overall economy. In 2000, advertising agencies spent only 7 euros per taxpayer, compared with 49 euros in Poland, 83 euros in Hungary, and 238 euros in Germany (source: ArboMedia). Therefore, advertising revenue does not represent a consistent source of income for the media sector."

MSI's evaluation is based on perceptions offered by journalists, media executives and activists for freedom of speech.

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board

Serbia

Notes:

Data for Serbia excluding Kosovo.

These data are considered a trade secret. Therefore, it was only possible to come up with total annual sales revenues on the basis of newspaper prices and to calculate the cost of advertising space from radio and TV stations and print media, and multiply these figures by the quantity of published adverts. However, all media outlets grant huge discounts on special advertising packages, which means that the actual payments for advertising were far below the stated amounts.

Sources:

Strategic Marketing and Media Research Institute

V. 2. The ten largest media companies in the country

Country	Media company	Turnover (EUR)	Profit/loss 2002	Ownership	Main fields of business activity within the country
Albania	N/A	N/A	N/A	N/A	N/A
Bosnia and Herzegovina	FTV	N/A	N/A	Public	Broadcasting
	Mreža Plus	N/A	N/A	Private	Broadcasting
	NIK "Dnevni Avaz"	N/A	N/A	Private	Print
	RTRS	N/A	N/A	Public	Broadcasting
	NTV Hayat	N/A	N/A	Private	Broadcasting
	TV TK	N/A	N/A	Public	Broadcasting
	TV OBN	N/A	N/A	Private	Broadcasting
	BHR1	N/A	N/A	Public	Broadcasting
	TV USK	N/A	N/A	Private	Broadcasting
	Radio Stari Grad	N/A	N/A	Public	Broadcasting
Bulgaria	Agency for Investment Information OOD	N/A	N/A	Private, local	Print media
	Balkan News Corporation ¹	28 329 269 600	10 700 367 600 profit	Private, foreign	Television
	Bulgarian National Radio	N/A	N/A	Public, local	Radio
	Bulgarian National Television	N/A	N/A	Public, local	Television
	Darik Radio	N/A	N/A	Private, local	Radio
	Monitor OOD	N/A	N/A	Private, local	Print media
	National Cable Television Evromcom	N/A	N/A	Private, local	Television, Internet services
	New Television – First Private Channel AD	N/A	N/A	Private, foreign ²	Television
	PM Group AD	N/A	N/A	Private, local	Television, print media
	Westdeutsche Allgemeine Zeitung Media Group	N/A	N/A	Private, foreign	Print media
Croatia	N/A	N/A	N/A	N/A	N/A
Hungary	MTM-SBS Televízió Rt.	N/A	N/A	Mixed	Television channel
	Magyar-RTL Klub	N/A	N/A	Mixed	Television channel
	Sanoma Budapest Kiadói Rt.	N/A	N/A	Foreign	Publisher
	Axel Springer Magyarország	N/A	N/A	Foreign	Publisher
	Multireklám	N/A	N/A	Private/local	Outdoor media company
	Népszabadság Rt.	N/A	N/A	Mixed	Publisher
	Danubius Rádió	N/A	N/A	Foreign	Radio channel
	Ringier	N/A	N/A	Foreign	Publisher
	Pannon Lapok Társasága	N/A	N/A	Foreign	Publisher
	HVG Kiadói Rt.	N/A	N/A	Local/private	Publisher

Country	Media company	Turnover (EUR)	Profit/loss 2002	Ownership	Main fields of business activity within the country
Macedonia	N/A	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A	N/A
Montenegro	N/A	N/A	N/A	N/A	N/A
Romania	Media Pro trust	N/A	N/A ¹	Private, American-Romanian partnership	First private TV station, first news agency, publications, radio station
	Intact trust	N/A	N/A	Private, Romanian capital	Second private TV station, newspaper, radio station
	Ringier	N/A	N/A	Private, Swiss capital	2 newspapers, 2 weekly publications
	Lagardere	N/A	N/A	Private, French capital	Radio stations
	Paunescu family ²	N/A	N/A	Private, Romanian capital	TV station, newspaper
	Micula family ³	N/A	N/A	Private, Romanian capital	TV station, newspaper
	Cristian Burci ⁴	N/A	N/A	Private, Romanian capital	TV station, radio station, advertising agency
Serbia	Kompanija Pink	N/A	N/A	Private (local) – Kompanija Pink	TV, radio, music production
	RTS	N/A	N/A	Public	TV, radio, music production
	TV BK	N/A	N/A	Private (local) – TV BK Telekom	TV
	RTV B92	N/A	N/A	Private (mixed) – Radio B92	TV, radio, film and music production, book publishing
	Kompanija Politika	N/A	N/A	Private (mixed)	Print media, TV, radio
	Kompanija Novosti A.D.	N/A	N/A	Private (local) – Kompanija Novosti	Print media, radio
	RTV Studio B	N/A	N/A	Mixed (local)	TV, radio, tourism
	Blic Press d.o.o.	N/A	N/A	Private (foreign)	Print media
	RTV 5 Niš	N/A	N/A	Private/ local	TV, radio
	Color Media International, Novi Sad	N/A	N/A	Private/ local	Print media
Slovenia	Radio-televizija Slovenija	[120 000 000]	[24 000 000 loss]	Public broadcaster	Radio, television, music label
	Delo	[45 000 000]	[5 000 000 profit]	Local, private	Daily print media

Country	Media company	Turnover (EUR)	Profit/loss 2002	Ownership	Main fields of business activity within the country
Slovenia (cont.)	Pro Plus	N/A	N/A	Mixed (foreign/local), private	Commercial broadcaster, two programmes
	Dnevnik	[17 000 000]	[1 700 000 profit]	Local, private	Daily and weekly newspapers
	Delo Revije	N/A	N/A	Local, private	Weekly and monthly magazines
	Večer	N/A	N/A	Local, private	Daily newspaper and weekly magazine
	Gospodarski vestnik	N/A	N/A	Local, foreign, private	Monthly magazines, business titles, daily newspaper
	Salomonov oglasnik	N/A	N/A	Local, private	Magazine publishing, radio networks

Bosnia and Herzegovina

Sources:

Fabrika d.o.o. and Media Plan Institute

Bulgaria

Notes:

The companies are listed in alphabetical order. Ranking by turnover is impossible due to lack of reliable data on turnover.

Sources:

¹ Balkan News Corporation Annual Report, 2002.

² APIS – Register Plus, computerized legal information system.

Hungary

Notes:

The listed companies are ranked by their advertising revenues.

Sources:

Médiagnózis, 2003

Moldova

Notes:

See notes to V.1. Even assessments based on "expert" observations may be very misleading considering the total absence of economic data. Only two media companies can be assessed as the largest given their sheer size: the public Teleradio Moldova (TV Moldova 1 and Radio Moldova, which together employ some 1,500 staff) and the Chisinau City's Euro TV and Antena C. Pro Media (the Romanian company that owns Pro TV and Pro FM) may be added – although the two stations have a much smaller staff they seem to operate on a proportionally larger budget; this judgment is based on the quality of their programmes and broadcasting.

Montenegro

Notes:

No data available.

Romania

Notes:

¹ A public scandal occurred in 2001 – 2002 because Media Pro had huge debts to the State, approximately 40 million US dollars.

^{2,3,4} Those are not media companies, but concentration of capital in this area.

Sources:

Alina Mungiu-Pippidi, *Politica dupa communism (Politics after Communism)*, Humanitas 2002 + Center for Independent Journalism inquiries

Serbia

Notes:

The companies are listed on the basis of their influence, number of media, size of building, infrastructure, number of employees and other "obvious" data. Information on revenue, income, taxes and capital values is unavailable.

Data for Serbia excluding Kosovo.

Sources:

Media Center, Belgrade

Slovenia

Notes:

No (or limited) official data are available; the figures are estimates.

V. 3. Number of full-time media staff

Country	Total	Print media	Television	Radio
Albania	4 047	1 491	1 966	590
Bosnia and Herzegovina	[3 000]	N/A	N/A	N/A
Bulgaria	N/A	N/A	N/A	N/A
Croatia	[2 373]	[1 266]	[466]	[447]
Hungary	N/A	N/A	N/A	N/A
Macedonia	N/A	N/A	N/A	N/A
Moldova	N/A	N/A	N/A	N/A
Montenegro	1 942	785	667	490
Romania	N/A	N/A	N/A	N/A
Serbia	[19 800]	[6 400]	[12 000]	[1 400]
Slovenia	N/A	N/A	N/A	N/A

Albania

Sources:

Monitoring Albanian Media Landscape 2002

Bosnia and Herzegovina

Notes:

There are no official data on the number of full-time media staff in the print media, radio and TV. The estimation has been made on the basis of the professional membership in the associations and unions of the professional journalists in Bosnia and Herzegovina.

Sources:

Media Plan Institute

Croatia

Notes:

No data on the number of full-time media staff are available. These are the total numbers of the members of CJA (Croatian Journalists' Association).

Sources:

CJA, 2003.

Montenegro

Sources:

Media Book of Montenegro, Montenegro Media Institute, July 2002

Romania

Notes:

Such data are not available for the Romanian media. According to the Media Sustainability Index (MSI), 2002: "Many media outlets do not officially hire the journalists they work with, even if the journalists work 10 hours a day. The reason is that employers have to pay high taxes for permanent employees. Taxes are paid both by employers and employees and can amount to 60 percent of the total salary. Of the nearly 8,000 registered journalists working on a permanent basis, the number of practicing journalists is estimated at around 14,000. Many journalists are paid as 'contributors', even if they work regularly in the newsroom. In some media organizations, journalists earn low salaries with larger bonuses awarded per article. This system forces the journalists to focus more on the quantity than on the quality of reporting."

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board

Serbia

Notes:

Data for Serbia excluding Kosovo.

These estimates are based on available data. According to official information, the total number of employed media staff in the Province of Vojvodina – extremely rich in media outlets – comes up to 6,000; RTS has about 6,500, of whom 800 in Radio Beograd and 1,500 in RTV Novi Sad. The available data for individual newsrooms were used to draw the overall estimate on the basis of the number and profile of media outlets.

Sources:

Media Center, Belgrade

VI. Appendix

VI. 1. News Agencies

Country	Name	Details
Albania	Albanian Telegraphic Agency	Financed by the State.
Bosnia and Herzegovina	FENA (The Federation of Bosnia-Herzegovina News Agency)	Public
	SRNA (The Serb News Agency)	Public
	ONASA	Private
	SENSE	Private
Bulgaria	Balkan Media Agency	Private
	Bulgarian News Agency	Public
	Sofia Press Agency	Non-governmental organization
	Meridiani News Agency	Private
Croatia	HINA – Croatian News Agency	State-owned
	IKA – Catholic News Agency	Church-owned
	STINA News Agency	Private
Hungary	Hungarian News Agency (Magyar Távirati Iroda)	Founded in 1881, the news agency is a publicly owned corporation, according to the National Wire Service Act adopted by the Parliament in 1996.
	Europress Press and Photo Agency (Europress Sajtó- és Fotóügynökség)	Private company, established in 1991 by Axel Springer Hungary Ltd.
	Haváriapress News Agency (Haváriapress Hírügynökség)	Private company, founded in 1994 by a group of journalists who specialize in crime reporting.
	Roma Press Center (Roma Sajtóközpont)	Non-profit organization, founded in 1995, specializes in news on the Roma community in Hungary.
	Westel Press	Private, founded in 1992 by ESMA Advertising Ltd. (ESMA Reklám Kft), specializes in sports news to be distributed by Westel, the leading cell-phone service providing company in Hungary.
Macedonia	Macedonian News Agency-MIA	State-owned
	News Agency MAKSFAKS	Private
Moldova	BASA-press	Private
	DECA-press	Private
	AP Flux	Private
	Info-prim	Public (owned by the Chisinau City)
	Infomarket	Private
	Infotag	Private
	Interlic	Private
	Moldpres	Public (owned by the Government of Republic of Moldova)
	NIKA-press	Private
	Orthopress	Private

Country	Name	Details
Montenegro	MINA	Private
	Mina Business	Private
	Teuta Press	Private
	Pomak Fax	Private
Romania	Mediafax	Private, dominant position on the market.
	Rompres	State-owned, under parliamentary control, weak position on the market.
	AM Press	Private agency, minor player on the market, with unknown financial resources.
	AR Press	Private agency, minor player on the market, with unknown financial resources.
	Rom Net	Private agency, minor player on the market, with unknown financial resources.
Serbia	Tanjug	State news agency, owned and subsidized by the federal government.
	Beta	Private news agency.
	Fonet	Private news agency.
Slovenia	Slovenska tiskovna agencija (STA – Slovenian Press Agency)	Established (after Slovenia won independence from the former Yugoslavia) as a mixed (private/state) agency. However, it is not economically viable and in recent years the Slovenian government has again been playing important role in its functioning (the general manager was named by the government).

Albania

Sources:
Albanian Media Institute

Bulgaria

Notes:
The existence of an important media pillar – the Bulgarian News Agency (BTA in Bulgarian, from “Bulgarian Telegraph Agency”) – has been a significant peculiarity of the Bulgarian media landscape ever since the start of transition. This century-old institution has survived successfully in the turmoil of transition and despite all attempts to convert it into a political tool. The BTA is still considered a reliable source of information, even though it is state-sponsored. Its journalists are widely regarded as unbiased. All this has had numerous implications for the media at large – among other things, the existence of a reference point, a source of information to build upon. Also, the BTA helped and still helps the Bulgarian media a lot in covering national and international issues – due to under-funding, few Bulgarian media can afford correspondents abroad. All this means that the media have delegated trust and credibility to another media (a rare practice in Bulgaria).

Sources:
Media research conducted by ACCESS-Sofia Foundation

Croatia

Sources:
CJA, www.hnd.hr

Hungary

Sources:
Association of Hungarian Journalists (MÚOSZ), Hungarian News Agency (MTI)

Macedonia

Sources:

Macedonian Institute for Media

Moldova

Sources:

Media Guide 2002

Montenegro

Sources:

Broadcasting Agency

Romania

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board

Serbia

Notes:

Data for Serbia excluding Kosovo.

Sources:

Media Center, Belgrade

VI. 2. Journalism education and training

	Bosnia and Herzegovina										
	Albania	Herzegovina	Bulgaria	Croatia	Hungary	Macedonia	Moldova	Montenegro	Romania	Serbia	Slovenia
Institutions offering university degrees in journalism <i>University Faculties/Colleges</i>	1 ¹	4 ¹	4	2	19 ¹	3 ¹	2 ¹	0 ¹	24 ¹	4 ¹	1 ¹
Private institutions	0	1 ²	0	0	5	1 ²	-	0	N/A	2	0
Institutions providing systematic training for journalists <i>(incl. postgraduate courses, incl. NGO courses)</i>	1 ²	2 ³	2	2	N/A ²	2 ³	1 ²	1 ²	1 ²	2 ²	1 ²
Private institutions	0	1 ⁴	0	2	N/A ³	0	-	0	1	2	0

Albania

Notes:

¹ State-owned, new branch, started 11 years ago.

² Albanian Media Institute (NGO)

Sources:

Albanian Media Institute

Bosnia and Herzegovina

Notes:

¹ University of Sarajevo Faculty of Political Science, Department of Journalism; University of Tuzla Faculty of Philosophy, Department of Journalism; Journalism Studies at the Mostar University Teacher Training College; University of Banja Luka Faculty of Philosophy, Department of Journalism

² Communication Faculty of Banja Luka, privately owned by Prof. Dr. Aleksandar Bogdanic

³ BBC School of Journalism in Sarajevo; Internews Bosnia and Herzegovina

⁴ High College of Journalism, Media Plan Institute Sarajevo

Sources:

Education of Journalists in Southeast Europe: A Step Closer to Professionalism, Media Online Selections, No 2, April 2002, Media Plan Institute Sarajevo

Hungary

Notes:

¹ Hungarian universities do not offer degree courses in journalism as such. Therefore journalism training is listed under 'communications' or 'media'.

² There are several such institutions, including the journalism academy run by the Association of Hungarian Journalists (MÚOSZ) or the Center for Independent Journalism, but they are not listed in a directory.

³ There are no reliable data on private organizations providing journalism training.

Sources:

Association of Hungarian Journalists (MÚOSZ)

Macedonia

Notes:

- 1 Faculty of Journalism – University St. Kiril and Metodii – Skopje; SEE university in Tetovo offers a degree in communication only; Institute for Sociological and Political-Juridical Research offers a master's degree in communication only.
- 2 SEE university is private.

- 3 Institute for Sociological and Political-Juridical Research offers a master's degree in communication only. Macedonian Institute for Media, an NGO, also provides systematic training for journalists.

Sources:

Macedonian Institute for Media

Moldova

Notes:

The Independent Journalism Center provides many courses for journalists, in different areas of specialization, but one couldn't say there is a continuous curriculum over a longer period of time that would build up to a formative process. Insofar as "systematic" means "frequent" or "on a regular basis," one could say that the IJC provides systematic training. Not so if the word is taken to mean a long-term, formative process similar to that in an educational institution.

- 1 State University of Moldova, and the International Free University of Moldova (ULIM)

- 2 Independent Journalism Center (NGO courses)

Montenegro

Notes:

- 1 Preparatory phase.

- 2 Courses, training. (More than 300 journalists and other media professionals have completed the courses offered by the Montenegro Media Institute.)

Sources:

Info Sheet, July 2003, Montenegro Media Institute

Romania

Notes:

- 1 The courses are mostly theoretical, and the faculty is rarely composed of active journalists.

- 2 Center for Independent Journalism

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board

Serbia

Notes:

Data for Serbia excluding Kosovo.

In addition to the above-mentioned institutions, journalist training is provided on a regular and systematic basis by the Media Center and journalist organizations – the Independent Journalists' Association of Serbia and the Journalists' Association of Serbia. A large number of journalists are trained on an ad hoc commercial basis. Certain foreign TV houses also arrange such ad hoc trainings: Bayerische Rundfunk, EBU (formerly BBC school), and others.

- 1 Journalism is taught only at the state faculty of political sciences and two private universities. Radio and TV production is studied at the Faculty of Drama Arts.

- 2 There are only two organizations registered for journalist training – ANEM Training Center and the Novi Sad School of Journalism – but there are numerous other organizations engaged in training journalists.

Sources:

Media Center, Belgrade

Slovenia

Notes:

- 1 Faculty of Social Sciences, University of Ljubljana

- 2 Courses provided by the Peace Institute.

VI. 3. Main journalist trade union organizations

Country	Name	Details
Albania	Association of Professional Journalists	Membership N/A
	League of Journalists of Albania	Membership N/A
	Forum for Free Media	Membership N/A
Bosnia and Herzegovina	The Association of Journalists of Bosnia-Herzegovina	500 members ¹
	The Association of Journalists of Republika Srpska	370 members ²
	The Independent Union of Professional Journalists of Bosnia-Herzegovina	300 members ³
	The Association of Croat Journalists in Bosnia-Herzegovina	151 members ⁴
	The Independent Association of Journalists of Republika Srpska	150 members ⁴
	The Union of Professional Journalists of the Federation of Bosnia-Herzegovina	1 800 members ⁵
Bulgaria	Union of Bulgarian Journalists	Approximately 2 500 members.
	Podkrepa Union of Journalists in Bulgaria	Approximately 800 members.
Croatia	Croatian Journalists' Association	Approximately 3 400 members.
	Croatian Union of Journalists	Approximately 3 000 members.
	Croatian Association of Catholic Journalists	Approximately 200 members.
Hungary	Independent Radio Trade Union (Független Rádiós Szakszervezet, FRÁSZ)	Trade union of the employees of the Hungarian Radio.
	Trade Union of the Employees of the Hungarian Radio (Magyar Rádió Dolgozóinak Szakszervezete)	-
	Trade Union of Television Employees (Televíziós Dolgozók Szakszervezete)	Trade union of the employees of the state-owned Hungarian Television.
	Press Trade Union (Sajtószakszervezet)	Trade union of employees working in all fields of the print media.
Macedonia*	Macedonian Association of Journalists	Number of journalist members is N/A.
	Association of Private Broadcasters	106 members
	Association of Private Newspapers and News Agencies	16 members
	Trade Union of Graphic-Informatics-Film and Publishing Companies	This trade union covers also media employees.
	Macedonian Institute for Media	86 media outlets from Macedonia are members of MIM.

Country	Name	Details
Moldova	Journalists' Union of Moldova	About 1 000 members.
Montenegro	Independent Trade Union of Journalists of Montenegro	Membership data N/A.
Romania	Romanian Journalists' Society	A federation of trade unions of journalists from the entire press – approximately 4 800 members ¹
	The Journalists and Printers Federation	Approximately 1 000 members ¹
Serbia	Independent Trade Unions of Serbian Journalists	Approximately 2 000 members.
	Autonomous Trade Unions of Serbian Journalists	Approximately 5 000 members.
Slovenia	Trade Union of Journalists in Slovenia (Sindikat novinarjev Slovenije)	Approximately 700 members.
	Association of Journalists in Slovenia (Društvo novinarjev Slovenije)	Approximately 1 700 members.

Albania*Notes:*

No data are available on membership in any of the associations. Besides, their role is very weak and they do not have any impact on the media scene.

Sources:

Albanian Media Institute

Bosnia and Herzegovina*Sources:*

¹ The Association of Journalists of Bosnia-Herzegovina

² The Association of Journalists of Republika Srpska

³ <http://www.totalsolutions.com.ba/>

⁴ *Education of Journalists in Southeast Europe: A Step Closer to Professionalism*, Media Online Selections, No 2, April 2002, Media Plan Institute Sarajevo

⁵ The Union of Professional Journalists of the Federation of Bosnia-Herzegovina, Mrs. Nagorka Idrizović, President

Croatia*Sources:*

Croatian Journalists' Association

Croatian Union of Journalists

Croatian Association of Catholic Journalists

Hungary*Notes:*

There are several professional associations of journalists in Hungary, including the Association of Hungarian Journalists (Magyar Újságírók Országos Szövetsége, MÚOSZ), Community of Hungarian Journalists (Magyar Újságírók Közössége, MÜK), Association of Hungarian Catholic Journalists (Magyar Katolikus Újságírók Egyesülete), Society of Hungarian Press Photographers (Magyar Fotóriporterek Társasága), Association of Hungarian Sport Reporters (Magyar Sportújságírók Szövetsége), Club of Hungarian Science Journalists (Magyar Tudományos Újságírók Klubja), National Association of Local Television Stations (Helyi Televíziók Országos Egyesülete), National Association of Local Radio Stations (Helyi Rádiók Országos Egyesülete), etc. These organizations do not operate as trade unions.

Sources:

Association of Hungarian Journalists (MÚOSZ)

National Alliance of Hungarian Trade Unions (Magyar Szakszervezetek Országos Szövetsége)

Macedonia*Sources:*

Macedonian Institute for Media

** Editor's note:*

The information is left as provided by the contributor, despite the fact that some of the organizations listed do not seem to be trade union organizations at all.

Moldova*Notes:*

There are some smaller associations of journalists specializing in a specific area (e.g. the Association of Sport Journalists, the League of Economic Journalists, the Association of Environmental Journalists, etc.), with an average membership of 20-30 people.

Montenegro

Sources:

Directory of NGOs in Montenegro, Podgorica 2002, Center for Development of Non-Governmental Organizations

Romania

Notes:

¹ According to their own estimates.

Serbia

Notes:

Data for Serbia excluding Kosovo.

The Autonomous Trade Unions of Serbian Journalists, formerly state-controlled (Milošević's) trade union organization, is currently redefining its role. Journalist trade unions are active in individual outlets and have good cooperation there, but coordinated action on head-office level is absent.

Sources:

Media Center, Belgrade

Independent Journalists' Association of Serbia

Journalists' Association of Serbia

Slovenia

Sources:

Trade Union of Journalists and Association of Journalists

Explanatory Information

Understanding Media

Short explanations on vast and complicated issues inevitably involve a risk of oversimplification, wrong prioritization and unsystematic presentation. Short explanations on media scene issues are no exception. Besides, the essayistic approach may seem counter-productive to academics.

On the other hand, a series of media-related studies have achieved comparability precisely through essayistic presentation of results: *World Press Freedom Review* evaluative texts presented as yearly reviews; *Balkan Neighbours* newsletter six-month reports on media images; *Comparative Survey of the Media Legislation in the South Eastern European Countries*, etc. In addition, this is the only way to cover issues requiring qualitative measurement. A number of important basic parameters of the media scene (e.g. legal framework, level of experience, best and worst practices, implementation of procedures, media freedom) are not measurable by reliable quantitative means. Hence the most important of these are addressed below for the sake of achieving a more comprehensive understanding of media landscape developments. We were determined to elucidate important aspects of the media landscape (specific context, dynamics, political background, etc.) that figures can neither explain nor even cover.

In short, we felt it was not only fair and instructive, but in fact obligatory to grant the local media centers freedom to present some key issues of the media landscape: from the local point of view, from the point of view of local expertise and the local perspective. The risk is related to the fact that these evaluations may not be sufficiently comparable and compatible, as they are designed to provide explanations precisely about non-comparable aspects of the issues under review. Being fully aware that greater liberty of interpretation reduces comparability, we believe that lower comparability is fully offset by keen observations on the local media scene developments, by practical examples and reasons why.

Presenting information in such a way invariably demands space limits. For the purpose of being consistent rather than comprehensive, the explanations on a given issue rarely exceed 250 words. Undoubtedly, it is impossible to make an in-depth analysis of the situation in 250 words. However, this is enough to point out some serious problems concerning the topic in question; to indicate some of the significant changes on the media landscape that took place in 2002 or earlier, as well as notable tendencies. To identify both the common, recurring features and some country-specific qualitative characteristics.

This part offered opportunities to improve, adjust, amend, clarify the information provided in the first part of the survey. To explain developments, to answer the question “why,” to evaluate quality, speed, or factors external to the media scene, etc. Also this is the place where country-specific features surface. This section serves as an important corrective for interpreting data and for getting closer to the reasons why the media scene data are such as they are. That is why the texts are evaluative, and often critical of the local media landscape. This explanatory part also does what the title suggests: it explains a lot. It explains why in most countries “audited data” is a term rather than a reality. It helps us understand that comparability/non-comparability of media figures is an indirect result of comparability/non-comparability of the relevant legislation; that the media landscape has its reasons to be what it now is – reasons to be found in recent history; that there are tracks and agendas that can be identified in most of the countries in the region...

In short, the reader could easily skip this part if he or she does not believe in essayistic presentation. However, the reader could benefit from it. All the more so considering that there are various ways of presenting one and the same issue, and that the information offered here seems readable enough.

1. Media as a Corrective o

Media as a Corrective of Government

A short description of relations between media and government is presented here. Within the wide range of approaches to the issue a preferable one is to evaluate how the media usually respond to government decisions: do they report, comment on, offer an opportunity for public debate on key questions, etc. Exemplifying these relations is also an acceptable option. Evaluations of the media-government relations are expected to be both independent (non-biased) and made from an insider's point of view (local expertise-driven).

ALBANIA

After 1990, following decades of government tutelage over the press, the Albanian media faced new horizons of freedom. The advent of independent media, quite naturally, was duly characterized by mounting political pressure on them and severe lack of professionalism among journalists. These phenomena were, to a considerable extent, due to the absence of a proper regulatory framework.

The first legislative interventions attempting to regulate the conduct of media professionals took place back in 1993 when the then People's Assembly (the Assembly), adopted Law No. 7756, "On the Press," dated 11.10.1993.

Law No. 7756 was repealed in its entirety by the new legislature. Several other laws that have a direct or indirect impact on the media profession – such as the Law on Electronic Media, the Freedom of Information Act, the Data Protection Act, and the Classified Information Act – have now been adopted by the Assembly at the end of a more transparent and participatory process.

At present, a series of regulations and several regulatory agencies make up the framework within which the Albanian media operate. Several aspects of the new legislative framework, aimed at achieving greater transparency in governance combined with an increase in the number of media and their power, as well as at advancing democratic culture, have helped shape the relationship between the media and the Government. As a result, media coverage of government activities has intensified. On several occasions, following exposure of wrongdoing by the media, the Government has taken the necessary corrective measures (a Top Channel satirical programme called "*Fiks Fare*" has been perhaps the most effective in this regard).

Sources:

Freedom of Expression: The Law and Case Law, Institute of Public & Legal Studies

BOSNIA AND HERZEGOVINA

The media remain very active not only in reporting but also in offering interpretations and comments on government moves at all levels. The majority of print media are very critical of the government's conduct. Of course, there are also media with a less critical stance.¹

The structure of Bosnia and Herzegovina authorities is a specific one. There are 14 governments at two levels: ten cantonal governments in the Federation of Bosnia and Herzegovina, the governments of the Federation of Bosnia and Herzegovina and Republika Srpska, Government of Brèko District, and central government – Council of Ministers – which has narrow, limited responsibilities. Most vital issues are not under the authority of central government, so the media focus shifts upwards, to governments within the Entities. Media remain very critical of ministers' personalities, and they often actually produce entire files on them: war profits, connections with secret services and underground economy, payments and misappropriations. Some of the affairs addressed by media remain in the service of inter-party disputes. Media in Bosnia and Herzegovina are not sufficiently employed for the function of a corrective body of government(s) work. They are too concerned with personal positions, too often viewing controversial issues dealt with by governments through the ethnic prism of divided environments. Media have raised numerous issues concerning the functioning of governments. However, there is no evidence that any of them has served as a basis for initiating a broader public debate, or that media writings have ever exercised any

significant influence on the conduct of authorities (resignations, investigations, decision reconsidering, launching public debates). This type of communication between authorities and voters has almost vanished, especially because, due to the absence of agreed political will and blockages in Parliament, most laws are directly enforced by the High Representative of the international community.²

Sources:

¹ Federation Media Ombudsman

² Media Plan Institute, Sarajevo

BULGARIA

Media freedom long remained the only unquestionable achievement in Bulgarian public life and one of the very few visible results of the democratic transition. Although the role of the Bulgarian media as mediators in the exchange of ideas and public communication, as responsible civil society actors and “democracy watchdog” has been called into question in recent years, the media have undoubtedly served as a corrective of government on a par with the political opposition and civil society structures.

In the past ten years the most painful problems of censorship, diversity restrictions and media freedom have been gradually limited to the sphere of state-controlled media. The other, i.e. the independent (from the State) media have emerged as “anti-government” – whatever the present government might be.

The entire period of “transformation” has been marked by constant clashes between the media and political power. Every single government since 1989 has blamed the media for most of the shortcomings, crises and problems of national development. Even today hostile media attitudes and not reality itself are seen by the ruling political elite as one of the major obstacles to the incumbents’ performance.

The media played a key role in fostering the existing negative attitudes to the former right-of-centre government of the coalition United Democratic Forces (UtDF), in securing victory for the Simeon II National Movement (SSNM) in the last general elections (2001), and in lowering the SSNM rating in opinion polls in 2002-2003.

As a whole, the media scene remains a battlefield for the political establishment and the media as real civil society representatives. Clashes between state/party influence, on the one hand, and the media, on the other, heavily pollute the media scene, distort media development and constantly generate public scandals.

CROATIA

The media’s role as a corrective of government is very dubious and questionable. The media are closely connected with centres of power and political parties. Those connected with the opposition criticize the government, but those connected with the ruling coalition very often assume the role of advocates for the government. The situation is even more complicated, because the ruling coalition was founded by six parties. The second biggest party from the original coalition is now in opposition. Thus, the media connected with the different parties promote mostly party politics, and this is visible. When pro-opposition media criticize the government, which happens very often, pro-government media respond immediately. In this “battle of words” journalists very often resort to what they claim is investigative reporting, exclusive stories, and sensational disclosures.

The public is confused, not knowing what is really going on. Croatia lacks independent, impartial and professionally well produced media. Even though the HRT (Croatian Radio and Television) is a public media, it favours particular political options.

The government owns two daily newspapers (*Vjesnik* and *Slobodna Dalmacija*) and the state news agency (HINA).

Source:

Maloviæ, Stjepan and Selnow, Garry: *The People, Press and Politics of Croatia*, Praeger Publishers, USA.

HUNGARY

Hungarian media have gone through major transformations over the last 15 years. The formerly government-controlled press became pluralistic as a result of the newly created democratic legal framework and the appearance of private, mostly foreign ownership.

Privatization proved to be pivotal to the development of print media. Foreign ownership has played a positive role, because it has limited the possibility of the post-communist political elite to intervene directly in the editorial policy of newspapers. The press is predominantly owned by German, Swiss, Austrian, Dutch, British, and Finnish companies which have modernized the industry and professionalized distribution, marketing and advertising, but, in general, let the editors determine the content of their publications.

Under the media law of 1996, a dual system was created in the broadcast media. The formerly government-controlled television and radio channels were transformed into public stations and frequencies were allocated to new commercial outlets. This way the monopoly of state radio and TV stations was abolished, and market liberalization has led to more pluralism in broadcasting.

Though the significance of the deep transformations in the media cannot be overestimated, the situation is far from perfect. New structures and old habits co-exist, and the imperfections characterizing the political culture of the political elite and the professional performance of journalists often hinder the proper functioning of the media system. The most problematic areas are persisting political pressure, the crisis of public service broadcasting, weak news competition, inadequate local media markets, lack of solid professional standards in journalism, and insufficient minority access to and representation in the media.

Though the media law emphasizes the importance of press freedom and the plurality of views, the political elite often seeks to institutionalize informal or indirect control over news organizations. For example, there have been cases in which the government has channeled public advertisements to friendly newspapers or denied critical publications exclusive information. The political pressure is stronger in the case of public broadcasting, which relies heavily on state subsidies. This situation has deepened the crisis of public television, which is incapable of elaborating viable strategies vis-à-vis the newly launched commercial channels. The audience of public TV has significantly dropped, and the loss of revenue from advertisement has to be replaced from the state budget – and that often has a political price. For example, governments seek to place loyal people in key managerial and editorial positions.

The privatization of the print media market and the launching of commercial television and radio channels have created prerequisites for pluralism in the media. Nevertheless, news competition, especially in broadcasting, remains rather weak. As regards the print media, political newspapers seek to provide quality information to the public. But their resources are limited, and thus costly journalism genres such as investigative reporting are seldom practiced. In the broadcast industry, commercial outlets have the financial resources to produce in-depth stories, but their programme flow is dominated by entertainment and even their news shows remain rather apolitical.

In Hungary few journalists would openly challenge the legitimacy of fact-based, impartial, fair, balanced reporting. At the same time, professional standards are often insufficient. A significant part of the media community is divided along political lines, and opinionated and biased reporting is not uncommon. Soft corruption and hidden PR activities also call into question the integrity of journalists, who thus become easy targets for the political or business elites.

The media have a serious deficit in the area of reporting diversity. Journalists are often not equipped with the background knowledge or sensitivity to cover properly issues concerning ethnic conflict, racism, or homophobia. The scarcity of Roma journalists in the newsrooms is another shortcoming.

MACEDONIA

As a corrective of government, the media in Macedonia can be divided into two groups. The first group comprises media that “almost exclusively” report without any commentary the decisions of the government (this applies foremost to the public service, i.e. Macedonian Television and Macedonian Radio, smaller private TV stations like BTR and Sutel, and the “state newspapers” such as *Vecer* and *Fllaka*). The second group of media do not only report but also comment on the decisions of the government (especially the private TV stations, like the national A1 and Sitel TV, and the local Kanal 5 and Telma from Skopje; the private radio stations such as Kanal 77; the private newspapers such as *Utrinski Vesnik*, *Dnevnik*, *Fakti* and *Vest*, and the weekly magazines *Fokus*, *Aktuel*, *Start* and *Zum*).

Very few media organize public debates on key social issues. One of the few exceptions is a debate show on the

private TV A1 called “Cumu” (“What For”). In this show, in addition to experts in the field in question, and representatives of the ruling and opposition parties, ordinary people also take part (as direct participants in the show and by means of phone-ins). In addition, there is another contact show, called “Stadium” and aired by the private radio station Kanal 77, where people have the opportunity to present their own views on current issues and problems in the country and even to confront one another. On the other hand, papers like the dailies *Utrinski Vesnik*, *Dnevnik* and *Fakti*, and the weekly *Fokus*, regularly run so-called “author’s texts”: texts by experts and intellectuals from different fields, in which the writers express their own opinions, views, and analyses on current issues of public concern.

Notes:

This information is based on research results from “Media Monitoring in Macedonia,” a project (currently in its second year) monitoring 23 media (electronic and print) in Macedonia on a monthly basis.

Sources:

Research “Media Monitoring in Macedonia”, Institute for Sociological and Political-Juridical Research – Skopje
Pluralism in the Daily Informative Programmes, Broadcasting Council, Analysis, Researches, No. 1, 2001

MOLDOVA

Although there are virtually no independent and impartial media in Moldova, the spectrum of opinions ranges from the far right to the far left. In terms of opinions the media may be said to be free; they are not free in economic terms as they need support from some political interest in order to survive economically. Given the wide spectrum of media voices, therefore, the media are very receptive to all the moves made by the government, and their reactions range from blanket denigration (e.g. *Flux* daily, presumably supported by the nationalistic Popular Christian Democratic Party) to blanket praise (e.g. the state’s *Moldova Suverana* and *Nezavisimaia Moldova* dailies). Thus one can say that if the reader has enough time to go through 5-7 publications a week to get a fairly full picture of an issue, as reflected by 5-7 political viewpoints, then there is enough room for public participation. Public fatigue is another question, though.

MONTENEGRO

In general, journalists’ reports on Government activities are based on news conferences and Government press releases. Some of them are affirmative, and others are critical. Reports are rarely result of investigative journalism.

According to opinion poll survey devoted to print media 13% of citizens think that media fulfill its social role of control over politically and economically powerful, 25% of citizens think that media partly fulfill control and 35% of citizens think that media didn’t fulfill its social role of control. There are 27% of people who didn’t answer or didn’t have opinion about this topic.

Source:

MMI research *Public Opinion in Montenegro on the Daily Press and Weeklies* conducted by Agency Damar, Podgorica

ROMANIA

After the 2000 elections, when the Social Democratic Party (PSD) came back in power, Romania registered a significant backslide in terms of press freedom. The government party controls by economic means most of the media, especially the local outlets and the TV stations. Media Monitoring Agency surveys revealed that the PSD leaders dominated TV in 2002, being present in more than 75% of the total political news, almost always in a favourable light. Prime Minister Adrian Nastase is doubtlessly the star of the newscasts, regularly appearing in four to five separate stories in the evening news. Consequently, people are less interested in the news, and the news programmes have lost almost 20% of the audience they had in 2000. The public station (TVR) is obedient by tradition, but the private stations are also dutiful, being bought with economic perks or even owned by political allies of the government party.

Investigative journalism has suffered a serious decline. Critical opinions and articles are limited to several central newspapers and magazines, with a narrowed impact.

Sources:

Media Monitoring Agency (www.mma.ro), "A Report on the Freedom of Speech in Romania"
Policy Warning Report, No. 1/2003, edited by the Romanian Academic Society (www.sar.org.ro)

SERBIA

A survey conducted by the international association IDEA among a sample of 10,000 respondents and designed to look into the media-public opinion relations in nine SEE countries (January-February 2002), reveals that 19.3% of the Serbian citizens have no faith in the independence of their media. Asked whether the media truthfully reported on political and national topics, close to 40% of the Serbian citizens said they believed that the media did that always (4.2%) and often (34.7%). Over half of the respondents thought that the media were under the influence of powerful people and organizations. These figures, as well as numerous findings of domestic and foreign media analysts, indicate that the media in Serbia foster impartial and non-partisan reporting on all relevant events, and avoid commenting. Media monitoring carried out by the SMMRI agency in cooperation with the Media Center, Belgrade, showed that throughout 2002 the prevailing shares of TV and radio contributions as well as newspaper articles were neutrally intoned, within the context of daily information programmes or reports. It is interesting that, except for TV B92, no TV station has an authorial comment in its information-political programmes. Reporters most often resort to interviews or surveys in order to present critical views and are very careful not to make a comment of their own. By contrast, the print media, and especially the weeklies, cultivate journalist comments and criticism, but the influence of print media on the authorities is incomparably smaller than that of TV. The opposition – thus the ruling parties before the democratic change in Serbia in 2000 – is to a high degree neglected by the media and its critical attitude to the government is, in the media, expressed by independent analysts, political analysts, sociologists and economists. Furthermore, media analysts generally agree that investigative journalism has almost disappeared as a specific genre in Serbia.

Sources:

Media Documentation of the Media Center, Belgrade

SLOVENIA

The leading Slovenian media regularly offer articles and shows that are highly critical of the government and its performance. Three main daily newspapers (*Delo*, *Veèer* and *Dnevnik*), weekly magazines (*Mladina*, *Mag*), radio (public Radio Slovenija) and television (TV Slovenija, commercial Pop TV) stations offer reports, commentaries, analysis, and interviews that are sometimes based on investigative work and disclose cases of corruption, irregularities, wrongdoings, and so on, in the work of the government, its ministries and offices, as well as regional authorities. There were important cases of illegal funding of election campaigns (weekly magazine *Mladina* on Slovenska ljudska stranka – Slovenian People's Party), non-transparent and dubious spending of public funds and money (government's aeroplane, sales of state apartments to political representatives, corruption in the courts regarding public budget spending), etc. However, the right-wing opposition regards the main media as left-wing or liberal-oriented, as remainders of the former communist regime, and not as pluralistic media.

2. Public Trust in the Media

Public Trust in the Media

The purpose here is to give a general idea about the level of public trust in the media, the reasons for which particular media are the most trusted ones (offering reliable information; fast and accurate reporting; independence; clear and consistent political orientation; profound analysis and commentaries; respected journalists and contributors, etc.) Opinion poll data on the trust rate could help us understand better many other issues related to the media landscape.

ALBANIA

Surveying the opinion of media users in Albania has turned out to be a controversial exercise. The results of opinion polls are challenged regularly by those who are not satisfied with the findings. The data from the latest poll by the ISO (an Albanian NGO specialized in surveying), aimed at revealing the gross rating point for all television stations, were released in April 2003. Whereas the measurements concerned all parts of the programming, everybody's eyes were on the ratings of the news programmes. According to the ISO, the public broadcaster Top Channel (paradoxically, this station is only licensed for local broadcasting) and Klan have succeeded in attracting the largest audiences for their news programmes.

Source:
Institute of Surveys and Opinions (ISO)

BOSNIA AND HERZEGOVINA

No research has been conducted in Bosnia and Herzegovina as to "which medium is most trusted." What we know is the answer to the question of which is most often viewed, watched, read – and that is not the same thing. Due to the consequences of the war and ethnic divisions at all organizational levels of society and daily life, when it comes to the media a major part of media users distinguish information as "ours" and "theirs." This indicates that the main motive for media usage is not always one's own experience or independent recommendation of their reliability, accuracy, promptness, attractiveness... but the identification with the ethnic perspective or ideology concept of media. With rare exceptions (daily *Nezavisne Novine* and PBS, which is still developing), the media are either explicitly local or they cover only the areas of ethnic majorities, thereby remaining notably limited.

Source:
Media Plan Institute, Sarajevo

BULGARIA

Public confidence in the media remains one of the most serious issues on the Bulgarian media landscape. According to a survey from end 2002, Bulgarian National TV is trusted by 56% of the population, Bulgarian National Radio by 51%, and the press (as a whole) by 34%. The survey also measured public confidence in the Police (56%), Presidency (55%), Army (48%), Bulgarian National Bank (38%), Government (30%), Parliament (18%), and the Judiciary (15%). However, all data require careful interpretation. First, figures fluctuate considerably from one month to another. Second, within such a framework the media are represented and regarded as national institutions (that is why most polls refer to "the press" as a whole despite the great variety of print media). Thirdly, since different polling agencies use different methods, the quoted figures offer comparable, and not absolute dimensions of "public confidence."

Public trust in the media is formed along the parameters of: reliable information; fast and accurate reporting;

independence; clear and consistent political orientation; in-depth analysis and commentaries; respected journalists and contributors. The first three parameters are probably the most important ones. As a rule, all the media are strongly suspected of being biased in one way or another (that is why it seems unlikely that public confidence in the media could exceed 60%). In general, the leading electronic media (BNT and BNR) tend to be more trusted than the press, despite the fact that the press, especially the independent dailies, is more aggressive in looking for and offering information and commentary. The press itself combines these positive characteristics with sensationalist reporting and low standards of checking information.

Source:

MBMD Agency, opinion poll conducted 7-13 Dec 2002.

CROATIA

In a poll conducted by the research agency Puls, 50% of the respondents said they generally trust the media. Nevertheless, 25% do not have any trust in the media. It has to be said that local radio stations got very high ratings, along with the HRT (Croatian Television). The most trusted media are those which play an independent role, such as the daily newspaper *Novi List* and the popular independent radio from Zagreb *Radio 101*. The opposition media, like *Feral Tribune*, target a relatively small audience and their understanding of journalism is to criticize very aggressively all negative events or to “dish the dirt.” The public at large is sick and tired of negative criticism, so *Feral* addresses its sharp and bitter criticism to a relatively small target audience.

Source:

Puls polling results 2003

HUNGARY

According to a poll conducted in 2001 by the Szonda Ipsos Media and Market research Institute, few people believe newspapers or television news report on current affairs with complete objectivity.

Newspapers were considered completely objective by 5% of the respondents, while the number for television was 6%. A much larger percentage of respondents though said newspapers and television were more or less objective (46% and 45%). Also, around a quarter of the respondents said that objectivity depends on which newspaper or television channel is discussed (23% and 27%).

The situation was similar for the credibility of the media. Five percent of the respondents said that television news was completely credible, while 44% said it was more credible than not. The same numbers were slightly less favourable for newspapers: 3% think newspapers are completely credible, and 42% think they are more credible than not.

The same poll also inquired into the social prestige of journalists and found that on a scale of 100, journalists (45) got roughly the same scores as clerics (48), policemen (45) or lawyers (42).

Source:

Péter Bajomi-Lázár and Dávid Bajomi-Lázár: “Újságírók és újságolvasók” (“Journalists and Readers”) – *Médiakutató*, Winter 2001

MACEDONIA

Presently, on the media market the highest credibility and rating, according to the number of printed copies (although there are no publicly accessible data on the number of printed copies of the papers) and the size of the paid ads, is to be found in the private daily informative papers like *Dnevnik*, *Utrinski Vesnik*, *Vest*, and *Fakti* (in Albanian). From the weekly informative-political magazines one can single out *Start*, *Aktuel*, *Fokus*, *Zum*, *Kapital*, and *Lobi* (in Albanian). All of them have online versions too. From the electronic media (according to the rating of the most popular shows and the audience share of TV and radio stations), this category would include: the public

broadcasting service, i.e. Macedonian TV, and private TV broadcasters with national coverage like A1 and Sitel; the public radio broadcasting service Macedonian Radio, and private radio stations with national coverage like the Stip-based Kanal 77 and the Skopje-based Antena 5.

Notes:

Since 1998, audience measurement has been conducted in Macedonia on a regular basis by the Strategic Marketing & Media Research Institute (SMMRI), using a technique applied in many other countries – namely, diaries. Initially this was done on a quarterly basis. From 2002, this is done on a monthly basis, covering a sample of 1,000.

Sources:

Zivko Andrevski: “Media System in R.M – Conditions and Tendencies” (<http://www.mediaonline.ba/mediaupit/clanak.html>)
 MAR 2000 – Investigation of Media Public in Macedonia, Institute for Sociological and Political-Juridical Research, Skopje 2001
 Snezana Trpevska: TV and Public Segments, Broadcasting Council of Macedonia, 2003
 Original data from SMMRI for the 2001-2002 period

MOLDOVA

The November 2002 poll conducted by IMAS shows that 60.9% of the respondents prefer TV as their source of information, 26% prefer radio, and 2.9% print media. Radio Moldova leads by far – 18.9% “trust very much” its news, and 13.3% “trust very much” its analytical programmes. Antena C comes second with, respectively, 11.5% and 8.5%. The responses also show that Radio Moldova is “the most trustworthy” station, “the most objective” one and, most strangely, has “the best talk shows.” “Most strangely” because Radio Moldova and TV Moldova 1 have been heavily criticized by virtually all the other political parties and civil society (i.e. others than the Communist Party which holds 71% in parliament and hence total control of the country and the public broadcaster) for monopolizing the broadcaster and not allowing the opposition and civil society on air. The poll results are explicable, though, as the public broadcaster is the only domestic nationwide station, and outside of Chisinau and several other cities this is the only source of information.

In the case of television, TV Moldova 1 is second in terms of popularity and perceived reliability after the Russian public channel ORT. When it comes to TV, the respondents prefer watching the Russian news broadcast from Moscow for the audience in Russia.

Source:

IMAS opinion poll, November 2002.

MONTENEGRO

Dailies:

1. <i>Vijesti</i>	21.7%
2. <i>Dan</i>	18.1%
3. <i>Pobjeda</i>	8.0%
4. <i>Vecernje novosti</i>	4.9%
5. <i>Publika</i>	3.5%

Reasons for credibility cited by respondents: topicality, 16.9%; reliability, 15.6%; “I want to be informed,” 14.1%; variety, 11.8%; useful information, 8.3%; “It is close to my political preferences,” 7.6%; habit, 6.7%; pleasure, recreation 6.3%.

Magazines:

1. <i>Monitor</i>	9.0%
2. <i>Svet</i>	7.1%
3. <i>Telegraf</i>	2.4%
4. <i>Svedok</i>	0.9%
5. <i>NIN</i>	0.9%

Reasons for trust cited by respondents: topical summary, 17.2%; more useful information, 10.6%; variety, 10.5%; reliability, 10%; pleasure 7.7%.

Notes:

These data are from a survey conducted by Damar, an opinion poll agency which has been working in Montenegro for ten years now and which is one of the most respected agencies in the country. Sample: 1,400, population aged 15+; diary method; period of research: 24-30 April 2002.

Source:

MMI research *Public Opinion in Montenegro on the Daily Press and Weeklies* conducted by Agency Damar, Podgorica

ROMANIA

Market research studies do not include questions about trust in specific media outlets. About 80% of the Romanians turn to TV stations (as a whole) for information, while only 8% buy newspapers.

Still, the media as a whole are one of the most trusted institutions in Romania, after the Church and the Army. The trust rate in the media was 60% and has since been increasing steadily.

Source:

Public Opinion Barometer, 2002, commissioned by the Open Society Foundation
<http://www.osf.ro/ro/bop/cercetare.html>

SERBIA

According to a December 2002 opinion poll, the information rates of individual media are as follows: RTS 38%, BK TV 20%, TV Pink 11%, TV B92 7%, TV Studio B 5%, other TV stations 4%, *Blic* daily 4%, *Veèernje novosti* daily 3%, all radio stations 3%. Bearing in mind that the above-mentioned media were identified as sources of information by the respondents, the relevant percentages may also be taken to reflect the trust rates. In addition, there is an abundance of information resulting from direct polls of media groups, but their findings are often contradictory and may not be considered relevant.

Institutions of the system lack the trust of 39% and enjoy partial or full confidence of 46%; institutions of the government are not trusted by 51% as opposed to 37% who have trust in them, partly or in full; institutions of the public sector enjoy the trust of 64% of citizens, while 71% and 51% percent of the citizens have no trust in political parties and the political elite respectively; 13% of the Serbian citizens believe that “almost all officials are corrupt,” 51% find “most officials corrupt,” whereas 30% think that a minor part of the officials are corrupt.

Sources:

Center for Policy Studies, Belgrade
Strategic Marketing and Media Research Institute
International Republican Institute, Belgrade Office

SLOVENIA

Generally, public radio and television is highly trusted, as well as the three main daily newspapers (*Delo*, *Veèer* and *Dnevnik*). The commercial Pop TV has in the past leaned more towards tabloid reporting, but in recent years it has also promoted some reliable and accurate reporting. The magazine *Mladina* has disclosed a number of cases of corruption and scandals in the political sphere; however, right-wing politicians regularly criticize and attack it as being too leftist and liberal-oriented, and too close to the ruling coalition. The magazine *Mag*, on the other side, is attacked by left-wing politicians as being untruthful, unfair and biased, as well as too rightist.

3. Media Regulation

Media Regulation

What is expected here is a list of the main media regulatory acts, plus information about the year of adoption and the number of amendments to the relevant laws. The idea is to get a general picture of the progress in media regulation, and instead of expertise per se, formal parameters are followed here. When time-oriented, such information can lead to important conclusions. If compared, the years can also suggest when and why a particular issue came to top the media regulation agenda (e.g. access to information regulation).

ALBANIA

1. Law No. 8410 “On the Public and Private Radio and Television in the Republic of Albania”

Date of adoption - September 1998;

Amendments - Law No. 8657/31.7.2000

Law No. 8794/10.05.2001

Law No. 9124/29.07.2003

2. Law No. 8239 “On the Press”

Date of adoption – September 1997

Amendments – N/A

3. Law No. 8503 “On the Freedom of Information on Official Documents”

Date of Adoption – June 1999

Amendments – N/A

4. Law No. 8457 “On Information Classified as State Secret”

Date of Adoption – February 1999

Amendments – N/A

5. Law No. 7564 “On Copyright”

Date of adoption – May 1992

Amendments – N/A

6. Law No. 8520 “On the Protection of Personal Data”

Date of adoption – July 1999

Amendments – N/A

7. Decree No. 1960 “On the Albanian Telegraphic Agency”

Date of adoption – November 1954

Amendments – N/A

Notes:

Whereas only the laws on the press and broadcasting qualify as purely media legislation, all other pieces of legislation indicated above have an important impact on the freedom of media.

Sources:

Official Journal

Freedom of Expression: The Law and Case Law, Institute for Public & Legal Studies

Website of the National Council on Radio and Television.

BOSNIA AND HERZEGOVINA

All the laws in Bosnia and Herzegovina are new, enacted after 1995 (mostly during the last three or four years). Only the laws related to RTV have undergone frequent changes. Canton-level laws have been partly amended at the request of Federation of Bosnia and Herzegovina Ombudsmen in order to harmonize them with other regulations, i.e. to erase the provisions remaining from the times of former Yugoslavia and its system.

1. Bosnia and Herzegovina Law on Free Access to Information and laws on free access to information at both Entity levels (Federation of Bosnia and Herzegovina and RS)
2. Law on the Protection Against Defamation of RS and Federation of Bosnia and Herzegovina (both Entities)
3. Law on Public Information, RS
4. Law on Public Information / Media at cantonal level in the Federation of Bosnia and Herzegovina (there is no such law at the level of the entire Federation). Only eight cantons have these laws, not all ten of them.
5. Law on Public Broadcast Service of Bosnia and Herzegovina (PBS)
6. Law on RTV RS and Law on the RTV of the Federation of Bosnia and Herzegovina
7. Cantonal laws on cantonal RTVs (in the areas where cantonal RTVs exist)¹

Electronic media in Bosnia and Herzegovina are regulated by an independent state-level body, i.e. the Communications Regulatory Agency (CRA). Primary and secondary legislation relevant to electronic media includes:

Law on Communications, imposed by the High Representative in October 2002; recently adopted by the Bosnia and Herzegovina Parliament

CRA Broadcasting Code of Practice, adopted in August 1998; amended 9 June, 8 September 1999, 10 February 2000 and 29 October 2001

CRA Advertising and Sponsorship Code for Radio and Television, adopted in March 2000; amended 12 March, 29 October and 6 December 2001

CRA Rule: Compliance with Copyright Obligations, adopted in October 1999; amended 12 March and 29 October 2001

Bosnia and Herzegovina Election Commission Rules on media representation of political subjects during the election period, adopted in June 2002

Other rules relevant to electronic media.²

Sources:

¹ Federation Media Ombudsman

² Communications Regulatory Agency – CRA

BULGARIA

Constitution of the Republic of Bulgaria, adopted in 1991.

Law on Radio and Television, adopted in 1998, amended six times. (This Law revoked the 1996 Law on Radio and Television, parts of which were declared unconstitutional by the Constitutional Court.)

Law on Access to Public Information, adopted in 2000, amended twice.

Law on Classified Information Safeguarding, adopted in 2002, amended twice.

Law on Telecommunications, adopted in 1998, amended nine times.

A judgement delivered by Bulgaria's Constitutional Court in 1996 (on Constitutional Case No. 1/1996) explicitly stated that freedom of speech "does not apply only to 'information' or 'ideas' which find favourable reception or which are not considered offensive or are perceived with indifference, but also to those which offend, shock or upset the state or any other part of the population"... "The authorities in general, as well as political figures and civil servants, may be subjected to public criticism at a level that is higher than that to which private individuals are subjected."

Notes:

The Constitution provides the general background of media regulation, including the provision that the media are "free and shall not be subjected to censorship." Some constitutional provisions, however, seem highly controversial when applied in practice. (For example, "Everyone has the right to seek, receive, and disseminate information. The exercise of this right may not be prejudicial to the rights and reputation of other citizens, or to national security, public order, public health and morals. Citizens

have the right to obtain information from any state body or institution on any matter of legitimate interest to them, provided that such information is not classified as a state secret or other secret protected by the law and does not affect the rights of others.” Article 41 [1, 2].)

According to the Transitional and Concluding Provisions of the Constitution, “Pending the creation of a new legislative framework concerning ... the Bulgarian News Agency, the National Assembly shall exercise the prerogatives vested in the Grand National Assembly” in respect of this national institution. However, such legislation has not been passed to date, which means that the Agency is under the control of Parliament; the Agency operates under a Provisional Statute adopted by Parliament in 1994.

CROATIA

1. Law on Electronic Media, adopted 30 July 2003
2. Law on Telecommunications, adopted 19 July 1999
 - 2.1. Amended: 30 November 1999
27 July 2001
11 December 2001
Law on Telecommunications, adopted 30 July 2003 (new version)
3. Law on Public Information, adopted 8 October 1996
 - 3.1. Amended: 7 November 2001
23 April 2003
4. Law on Media, adopted 1 October 2003
5. Law on Croatian Radio and Television, adopted 19 February 2003 (the first Law on Croatian Radio and Television was adopted on 30 June 1990, and the second one on 2 March 2001)

“Not even the biggest cynic could predict that the new government would attack freedom of speech and media freedom worse than the former HDZ government.” This is one of the comments published on the CJA website shortly after the government announced the draft version of the Media Law. On several occasions independent media professionals and university professors declared that this law would restrict guaranteed media rights and freedoms.

The main objection is that the politicians want to suppress the publishing of business, professional, and any kind of secrets – and not just military secrets, as stipulated by the present law. Although two weeks before it moved the law to parliament the government accepted most of the remarks made by the CJA (Croatian Journalists’ Association), media professionals continue to suggest that there will be many problems in implementing this law. The state owns two dailies and the biggest national television, which should be transformed into public television. That is why in a very short period (three years) the Law on HRT has been modified two times. But journalists and independent researchers say that the main problem is that the government wants to control the media, and that will not change in the foreseeable future.

Source:
CJA website, www.hnd.hr

HUNGARY

The Media Act

The Act of 1996 on Radio and Television Broadcasting (commonly referred to as the Media Act) sets forth the operational principles and rules of radio and television broadcast activities in Hungary. This is the first law enacted in Hungary which made possible media privatization and media pluralism in the country. It took about five years of political and professional struggles to enact this law. The Media Act regulates the operation of public service broadcasters, public broadcasters, non-profit broadcasters, and commercial broadcasters. The Media Act also establishes the organizational and operational structure of the National Radio and Television Commission, which is the supervisory body for radio and television broadcasters.

The Press Act

Act II of 1986 on the Press ("Press Act") provides the basic rules related to the establishment and operation of print media, and outlines the basic rules for print journalism. The Press Act also regulates the obligations of governmental bodies and civic associations related to providing information to the press. Revision of the effective Press Act is currently under consideration. Prominent lawyers argue that ideally the scope of the Press Act should be limited to issues related to the conditions for the foundation of print media.

The Communications Act

Act XL of 2001 on Communications provides the basic regulatory framework for licensing communications equipment and devices, microwave networks, broadcasting transmitters and radio-communications terrestrial stations in Hungary. The Communications Authority issues such licenses following inspection of all technical conditions necessary for such activities. In order to receive broadcasting authorization in Hungary, the applicants must submit to the National Radio and Television Commission all licenses issued by the Communications Authority which prove there are sufficient technical conditions for broadcasting.

Other laws relevant to broadcasting:

There are other laws fostering freedom of broadcasting:

Act III of 1952 on Civil Procedure

Act IV of 1959 on the Civil Code

Act IV of 1978 on the Penal Code

Act LXIII of 1992 on the Protection of Personal Data and the Disclosure of Data of Public Interest

Act LXII of 1993 on Frequency Management¹

Act CXXVII of 1996 on the National News Agencies

Act C of 1997 on Election Procedure

Act CLVI of 1997 on Organizations for Public Benefits

Act LVIII of 1997 on Business Advertising Activity

Act XIX of 1998 on Criminal Procedure

Act LXXVI of 1999 on Copyrights

Furthermore, there are internal charters which deal with ethical issues and which have been adopted by public service and commercial broadcasters and their professional associations. The associations of print media (for instance the Association of Hungarian Journalists, MUOSZ) have also elaborated their ethical codes.

Notes:

¹ Act LXII of 1993 on Frequency Management is only relevant to terrestrial radio and television broadcasters. For instance, it regulates from a technical point of view the frequency assignment procedure, radio licensing, data suppliance and payment obligations related to frequency assignment.

Source:

Legal Database published monthly in CD Rom format

MACEDONIA

In the Republic of Macedonia, there are presently several laws in the mass media sector. The basic ones are:

Law on Broadcasting, passed in 1997

Law on Establishment of the Public Enterprise Macedonian Radiotelevision, passed in 1998

Law on Telecommunications, passed in 1996

Law on Concessions, passed in 1993.

In addition, the following laws are relevant to the media:

Law on Copyright and Neighbouring Rights, passed in 1996

Law on Commercial Companies, passed in 1996
Law on Establishment of the Public Enterprise Macedonian Broadcasting, passed in 1998
Law on Public Enterprises, passed in 1994
Law on Election of MPs to the Macedonian Parliament, passed in 1998
Criminal Code, passed in 1996

Notes:

In progress is the drafting of a new law on broadcasting that will also incorporate the Law on Establishment of the Public Enterprise Macedonian Radiotelevision.

Source:

Official Gazette of the RM, No. 20/97, 6/98, 42/93, 33/96, 47/96.

MOLDOVA

There are several media regulation acts:

1. The Press Law, adopted on 26 October 1994 (amended in 1995, 1996, 1997, 1998, 1999, 2000, 2001).
2. The Law on Broadcasting, adopted on 3 October 1995 (amended in 1997, 1999, 2000, 2001, 2003).
3. Access to Information Law, adopted on 11 May 2000 (amended in 2003).
4. Law on the Public Broadcasting Company Teleradio Moldova, adopted 26 July 2002 (amended in 2003).

MONTENEGRO

1. Media Law (September 2002, 52 articles, no amendments)
2. Broadcasting Law (September 2002, 133 articles, no amendments)
3. Law on Public Broadcasting Services of Television and Radio Montenegro (September 2002, 40 articles, no amendments)

Source:

Official Gazette of the Republic of Montenegro, No. 51 of 23 September 2002

ROMANIA

Electronic media are regulated by the Broadcast Law, adopted in 2001. That law gives more power to the government to control the licensing process. The National Council of Broadcasting (CNA) is the regulatory body, controlled by the Parliament. In fact, the CNA is applying the government policies, its members being politically appointed. After the Broadcast Law was adopted, the CNA lost its right to allocate frequencies. This power was granted to a newly created National Agency for Communications. Just a few months later, the power to allocate frequencies was transferred once again, this time to the Communication Ministry by a government ordinance.

The print media are not regulated by a law, despite some attempts to this effect by the government. The Freedom of Information Act, adopted in 2001, contains a special section on media, granting journalists some special rights such as faster access to public information (compared with ordinary citizens), and protection against arbitrary denial of access by public institutions. The state-owned news agency Rompres is regulated by a special law, adopted by Parliament in 2003. Initially, the agency was subordinate to the government, being part of the Public Information Ministry according to a government resolution. After the adoption of the law by Parliament, the agency was placed under the control of the legislative body, similarly to public radio and TV.

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board

SERBIA

Broadcasting Act (2002), Law on Public Information (2003), Law on Telecommunications (2003). These laws were elaborated with the participation of relevant professional associations and organizations, media and legal experts from the country, as well as representatives of the OSCE and the CoE, so that a large spectrum of possible amendments was addressed even before the relevant bills were moved to Parliament. The exception is the Law on Public Information: After a comprehensive debate, the Serbian Government added nine restrictive articles enabling the District Court to act upon the proposal of the public prosecutor and, in an emergency procedure, prohibit the distribution of a piece of information which, in the court's view, may cause violent overthrow of the constitutional order, or disrupt the territorial integrity of the country, disseminate war propaganda, incite violence, national or religious hatred, discrimination or hostility. The professional and media public protested the subsequent incorporation of those provisions, believing that they give the authorities a possibility for repressive treatment of the media. One of the most important provisions regulating the financing of the public broadcasting service in the Broadcasting Act was also subsequently changed. In October 2003, the Serbian Government decided that the PBS should not be financed from licence fees, which would have provided its independence from political or any other influence, and passed a decree stipulating that the broadcasting system should be financed from financial transactions taxes.

Sources:

Government of the Republic of Serbia
Association of Independent Electronic Media
Media Documentation of the Media Center, Belgrade

SLOVENIA

1. Media Law (adopted in 2001, amended in 2003)
2. Law on Radio and Television Slovenia (the public broadcasting service; adopted in 1994, amended in 2001)
3. Law on Access to Information (adopted in 2003)

4. Regulation Practices

Regulation Practices

A media regulatory authority exists in almost all surveyed countries, at least as regards electronic media. The following texts focus on the independence of the regulatory authority; principles of constitution of the regulatory authority; the role of the State and the political parties in the functioning of the regulatory authority; conflicts between the regulatory authority and the journalistic community. We believe this information could exemplify trends and approaches existing in the region, and also describe the regulatory environment: the atmosphere of media existence.

ALBANIA

Law No. 8410 "On the Public and Private Radio and Television in the Republic of Albania" of September 1998 establishes the National Council of Radio and Television (NCRT) as the licensing authority and the supervisor of legality in the field. From a constitutional standpoint the NCRT, which is composed of seven members elected by the Parliament, is independent and separated from all three classical branches of government.

The Law regulates the composition, functioning, organization and funding of the NCRT, as well as the election and removal from office of its members. In addition, it provides an exhaustive list of incompatibilities for NCRT members and establishes their obligation with respect to confidentiality. The aim of these provisions is to guarantee the NCRT's independence and to shield it from political or private interference.

It is worth mentioning that the entire Council may be disbanded if the Parliament does not approve the NCRT's yearly report for two consecutive years.

The NCRT has a vast scope of competencies related to the electronic media as follows:

It controls the implementation of the broadcast media law and other laws on media by the entities exercising private or public radio-television activities in Albania.

It monitors informative programmes broadcast by national radio-television operators. When deemed necessary, the NCRT monitors even informative programmes broadcast by local radio-television operators.

The NCRT requires the Telecommunications Regulatory Entity (TRE) to determine the number of frequencies available for local and national radio-television activities.

The TRE shall respond in writing to the NCRT within 30 days and make available to the latter frequencies for radio-television activities.

The NCRT issues licenses for radio-television broadcasts, based on the frequencies approved by the TRE.

It guarantees fair competition in the field of electronic media, ensuring at the same time the existence and further development of the Albanian public radio-television.

It issues and revokes licenses of private subjects for the broadcast of radio-television programmes, including teletext, in Albania and supervises the observation of the terms and conditions defined in the contract.

It adopts regulations and by-laws on the criteria for granting licenses in compliance with this law.

It grants licenses for the installment of booster transmitters for the broadcasting in Albania of foreign programmes in various areas of the country.

It grants licenses for the rebroadcast by foreign radio and television in Albania for the Albanian public.

It issues authorizations to the Albanian private and public operators for broadcasts from Albania to other countries (third parties), in compliance with international conventions.

Determines the norms for the production and broadcast of the public and private media, related to various aspects of the implementation of this law.

Decides the imposition of sanctions provided by the law, upon the subjects that violate these provisions, as well as, as the case may be, demands the intervention of other public bodies according to their competencies.

Keeps records, files and archives of licenses, as well as related documentation reflecting all subsequent changes.

Demands from the state administration, courts, banks and other relevant bodies, as well as from the management of the licensed subjects, any information it deems necessary to check the accuracy of data provided by the applicant for the license before the license is granted or at any other moment.

Offers opinions on the future of radio-television activity.

Expresses officially its opinion on the signing and correct enforcement of international agreements related to radio-television broadcasting.

Participates in international activities dealing with the strategy and perspectives of the development of radio-television, representing Albania, and supports the participation and cooperation of public and private subjects with analogous European and world organizations in the sphere of radio-television programmes and transmissions. It develops studies with recommendations on Albania's stand in international government talks on radio-television broadcasting.

Suggests changes to legislation and regulations, which are dictated by the technological, economic, social and cultural evolution in the field of electronic and mass media.

Develops the organizational structure and internal rules of procedure of the administration of the Council.

Reports at the beginning of each year on its annual activity and the manner in which the public and private broadcasters have observed the obligations emerging from the law.

In cooperation with the TRE it checks the quality of signal reception in the licensed areas and demands solutions to public complaints with regard to the quality of the transmission of radio-television signals.

The relationship of the NCRT with the political environment and the licensees has not been smooth. So far the opposition has refused to elect its representatives to the NCRT and the first annual report of the NCRT was rejected by the Parliament.

Moreover, the NCRT has been under fierce attack by those who have failed to get a national license and consequently by those who have managed to get a national license, for being unable to deter national broadcasting and piracy by those licensees that were licensed for local broadcasting.

Despite this shaky start, it must be acknowledged that most of the attacks on the NCRT have been driven either by political motives or by the economic interests of the operators on the market. As an overall assessment it may be said that the NCRT has performed reasonably well, bearing in mind the complete lawlessness that used to characterize Albanian broadcast media.

Sources:

"Electronic Media Law in Albania," Imholz, Kathleen, Elina Koçi & Robert Rittler, January 2001

BOSNIA AND HERZEGOVINA

The Communications Regulatory Agency (CRA) is an independent state institution regulating telecommunications and broadcasting throughout Bosnia and Herzegovina. Established on 2 March 2001 by a Decision of the High Representative, it combines the competencies of the Independent Media Commission (IMC) and the Telecommunications Regulatory Agency (TRA), which regulated their respective sectors separately. The obligations and responsibilities of the CRA are clearly laid out in the Bosnia and Herzegovina Law on Communications, which became effective in October 2002. The Agency is responsible for regulating the three principal fields of convergent communications: telecommunications, broadcasting, and the radio frequency spectrum. There are three respective operational divisions for each sector. These divisions are supported by a Communications Division, comprised of Public Affairs and Research Departments. Legal, Administration and Finance Departments complete the composition of the executive arm of the Sarajevo-based Agency. A regional presence is reinforced through two regional offices in Banja Luka and Mostar. The Agency has a governing body, the CRA Council. This is comprised of seven distinguished and expert international and national members. The Council guides the Agency on strategic issues of policy implementation. It consults with, and receives reports from the Agency, and adopts codes of practice, rules for broadcasting and telecommunications, and internal rules. The Council also acts as an appellate body for Decisions made by either the Agency or the Enforcement Panel (EP). The EP has six members and, like the Council, comprises both national and international members. It adjudicates violations of licensing conditions and other rules of the Agency, and imposes appropriate remedies and sanctions.

In relation to broadcasting, the Agency is responsible for:

- Issuing licenses to broadcasters;
- Setting regulations for broadcasting, advertising and programme content;
- Applying and enforcing applicable rules, and proposing appropriate changes;
- Monitoring adherence to the Rules and Regulations;

Acting to prevent illegal broadcast operations;
Protecting copyrights;
Handling and solving cases of alleged breaches of rules and regulations, often involving mediation.

All rules and regulations of the CRA are adopted by the CRA Council. Prior to adoption of any relevant rules, the CRA is obliged to initiate a public procedure, where the draft Rules and all other documents are given to the public for their comments, which are then presented to the CRA Council before it makes a final decision.

Source:

Communication Regulatory Agency – CRA

BULGARIA

The National Council for Radio and Television (NCRT, later Council for Electronic Media, CEM) was established as an independent regulatory authority in the electronic media sphere. Under political pressure, the NCRT experienced severe political conflicts. The NCRT's attempt to appoint a Bulgarian National Radio (BNR) director general in 2001, an attempt guided mainly by political criteria, triggered a journalists' strike at BNR and a lasting conflict. (The NCRT move – which was legitimate, lawful and complied with the existing regulations – nevertheless failed because it conflicted with the professional ideas and standards of a large part of the journalist community.) In addition, it turned out that the regulatory authority could split in two for political reasons, thus blocking decision-making mechanisms.

Of the vast number of laws that needed urgent passage, the very first legislative initiative of the new political majority in 2001 targeted the NCRT. The NCRT was replaced by the Council for Electronic Media, but the scheme by which this body was appointed remained 100% political: through quotas assigned to Parliament and to the President of the Republic. (All democratically elected presidents in Bulgaria to date have been nominated by political parties; as regards Parliament, the parliamentary majority is able to impose its decision about CEM members on the minority.) The desire to impose political control over the CEM is due to the fact that the Council is authorized to appoint and dismiss directors general of the national radio and TV, and has powers in radio and TV licensing.

The Council also issues penalty decrees for violations of the law by electronic media. (In 2002 it issued 56 penalty decrees.) In 2002 the CEM's performance was more non-conflicting, more mature and more sober. Still, until November 2002 of a total 144 CEM decisions 12 were appealed, and two were revoked by the court on grounds of legal non-conformity. The Council for Electronic Media does not enjoy notable public prestige and is strongly suspected of being under political pressure. (Introducing a quota assigned to the NGO community in the nomination and election of CEM members is under discussion, but this proposal is unlikely to be adopted in the foreseeable future.)

There is no special body in charge of print media regulation. The Commission on Protection of Competition monitors print media for conformity with some more specific legal standards. (For example, the value of prizes in lotteries should not significantly exceed the cover price of a single issue of a newspaper. This regulation is frequently violated.)

Notes:

In respect of the Bulgarian News Agency (BTA), Parliament acts as a regulatory authority. In 2002 the BTA director Panayot Denev was dismissed and replaced on the grounds that "The BTA presents Bulgaria in dark colours. ... [T]he agency selects the most ill-intended headlines from the media, through which it conveys the image of Bulgaria to the rest of the world". The BTA staff went on strike against the policies of the new BTA director (Stoyan Cheshmedjiev) and in 2003 the parliamentary majority was forced to elect a third BTA director (Maxim Minchev). From the point of view of "practices of the authorities in charge of media regulation" it is enough to quote Emel Etem MP, on replacement of BTA director Denev: "We gave Panayot Denev enough time to prove his loyalty to the incumbents. He failed and that is why he should be replaced."

Sources:

R. Yanovski. "Bulgarian Media Scene on the Verge of Normality." In: *Bulgaria-Yugoslavia. Journalism in Intercultural Dialogue*. ACCESS-Sofia Foundation, Sofia, 2002.

The Council for Electronic Media Annual Report, 2002.

CROATIA

There is no media regulatory authority in Croatia that could be compared with other countries in region. The only state authority is the Council for Radio and Television in the Croatian Institute of Telecommunication. Its primary functions are allocation of frequencies, monitoring and licensing of electronic media.

HUNGARY

Constitutional requirements. Article 61 of the Hungarian Constitution stipulates the following:

“(1) In the Republic of Hungary everyone has the right to the free declaration of his views and opinions, and has the right of access to information of public interest, and also the freedom to disseminate such information.

(2) The Republic of Hungary recognizes and protects the freedom of the Press.

(3) The law on the publicity of data and information and the law on the freedom of the Press require the support of two thirds of the votes of the Members of Parliament present for ratification.

(4) For the adoption of the law on the supervision of public radio, television and news agency services, and on the appointment of their leaders; the law on the licensing of commercial radio and television stations, and the prevention of monopolies on information, the votes of two thirds of the Members of Parliament present are necessary.”

The two-fold status of the National Radio and Television Commission (NRTC). The Hungarian solution for the governance of public and commercial media attempts to create a political balance by incorporating the representation of all parliamentary parties and NGOs of various backgrounds, as prescribed by the Media Act. As a result, in the beginning of 1996, the National Radio and Television Commission (“NRTC”) was established.

The NRTC is an organization of special status. It is a quasi-public administration body, whose budget must be approved by Parliament in a separate act. The NRTC’s public law status is two-fold.

On the one hand, from the public law point of view it is an independent legal entity that is only responsible to Parliament and operates as an independent budgetary institution. Its members are “only subject to the law, and cannot be instructed within the sphere of their activity” (Section 32 Paragraph 2 of the Media Act). The Act also provides that the members of the NRTC cannot be recalled (Section 33 Paragraph 1 of the Media Act).

On the other hand, the NRTC operates in the capacity of a public administration organ with typical executive powers. For instance, the Commission acts in an executive capacity when it exercises legal monitoring over the operation of broadcasters, when it establishes broadcast fees, or imposes a fine on the broadcasters concerned in cases specified by the Media Act and the “General Conditions for Public Bidding.”¹

The competencies of the NRTC. The tasks of the National Radio and Television Commission are regulated by the Media Act and the Procedural Rule of the NRTC, adopted by the Commission. According to these rules, the tasks of the NRTC are safeguarding and promoting the freedom of speech, helping broadcasters to enter the market, breaking down any information monopolies and the prevention thereof, and defending the independence of broadcasters. The Commission is obliged to prepare an annual report to Parliament in which the NRTC informs Parliament on the freedom of the media and the enforcement of related constitutional principles (Section 31 Paragraph 1 of the Media Act).

Conflicts between the NRTC and journalists. Due to the mission and competencies of the NRTC as specified in the Media Act, the NRTC does not enter into a direct conflict with individual journalists as it only directly deals with broadcasters. Most conflicts occur between the NRTC and the broadcasting organizations because of the following reasons:

- violation of advertisement rules;
- violation of violence rules as laid down in the Media Act;
- failure to pay, or delay in the payment of broadcasting fees as calculated by the NRTC;
- violation of programme content undertakings under a broadcasting contract.

Notes:

¹ The “General Conditions on Public Bidding” contain the detailed procedural rules on terrestrial frequency bidding. These rules were elaborated and adopted by the NRTC on 30 August 1996 and were published in the *Cultural Gazette* No. 31/1996.

MACEDONIA

The 1997 Law on Broadcasting provides for the establishment of a Broadcasting Council. The Council consists of nine members, all elected by the Macedonian Parliament for a term of six years, and entitled to re-election. The Council elects the Chairman and his Deputy from its own members. No member of the Council may be recalled (fired) from his post during his term in office, unless he submits his own resignation. Procedurally speaking, the proposal for election and appointment is formed within the Election and Appointment Commission of the Macedonian Parliament, made up of representatives of the political parties participating in the government, with Parliament making the final decision. According to the law (Art. 23), competent persons who are experts on media issues are proposed and elected, but in practice this provision has not been observed to date.

The Council is an independent body that represents the interests of the citizens of the Republic of Macedonia (Art. 23), but legally it has a "consultative" rather than a regulatory function. For example, the Council proposes the granting (Art. 16) and withdrawal (Art. 19) of concessions for broadcasting. The final decision is made by the Government of the Republic of Macedonia. The Council also recommends to the Government the exact manner of distribution of revenues from the broadcasting tax (for production and broadcasting of programmes of an informative, cultural, scientific and general educative character, then for development and technical equipment of the public broadcasting service, Art. 78). Thereby the State and the ruling parties both formally and practically have competence and the authority to interfere in the work of the Council. The drafting of a new law on broadcasting is in progress (presently submitted to the Council of Europe for evaluation) and according to this draft law, the Council will have a higher level of autonomy (it will be granted decision-making power with respect to award and withdrawal of concessions, etc.).

The Broadcasting Council and the commercial broadcasting companies (public and commercial radio and TV stations) are in "permanent" conflict on many issues. For example: granting of permissions for re-broadcasting, concession fees, programme standards, legal restrictions on broadcasting ads and teleshopping, rules on equal media presentation during election campaigns, survival of illegal broadcasters, distribution of revenues from ads and unfair competition of the public broadcasting service, and the unregulated status of the public local broadcasters. These and many other controversial issues and problems are partly due to the poor solutions provided by the law, but also to pressure (especially to reduce concession fees, the definite closure of illegal broadcasters, fair distribution of ad revenues between the public and the commercial services) coming mainly from private radio and TV stations which are thus trying to survive on the media market.

Notes:

At the initiative of the Stability Pact for South Eastern Europe, more than 20 experts have been working on the new law on broadcasting, thus developing a new concept for broadcasting laws in the Republic of Macedonia. The draft text has been completed, many public debates have been organized, and an evaluation has been prepared by the Council of Europe.

Sources:

Law on Broadcasting, *Official Gazette of the RM*, No. 20/97

Vesna Shopar, PhD, Zivko Andrevski, PhD, Dona Kolar-Panov, PhD: Media in Process of Political and Sociological Transformation in Macedonia, Institute for Sociological and Political-Juridical Research, 2001

MOLDOVA

There is one media regulatory authority, the Broadcasting Coordinating Council (BCC), which issues broadcast licenses. The BCC is also supposed to oversee the compliance by stations with broadcast legislation and regulations, but it has been notoriously ineffective in this respect. The Broadcasting Coordinating Council is composed of nine members: the parliament, president and government appoint three members each. The BCC members do not represent the body appointing them (according to Art.31[2] of the Broadcast Law), but in practice the BCC has always come under heavy criticism from the media community for its subservience to the authorities. This has become especially visible since the parliamentary elections of February 2001, when the Communist Party gained 71% of the seats in parliament, thus taking hold of other branches of government by having the authority to appoint the president and approve the cabinet. (The current President of Moldova is also the head of the Communist Party.) Another formal requirement of the Law is that BCC members resign from political parties and jobs in the media for the duration of their incumbency.

MONTENEGRO

The new media legislation is currently being implemented. According to the new Media Law, the regulatory authorities will be Broadcast Council and a Council of TV and Radio of Montenegro. Both councils will consist of independent individuals. Politicians cannot be members of those councils.

Source:

Montenegro Media Institute

ROMANIA

Only the electronic media are regulated by authorities. The National Council of Broadcasting (CNA) is a formally independent body, controlled by the Parliament. Its components are reflecting all political tendencies. Actually, in its day-to-day activities the CNA follows the government party's policy. The CNA adopted a more interventionist attitude after the election of Ralu Filip as Council President, after 2000. Ralu Filip has been known as a journalist supporting the Social Democratic Party, now in power.

The new Broadcast Law adopted in 2001 delegates discretionary power to the CNA to decide on withdrawing broadcast licenses of radio and television stations. In September, the CNA decided to revoke the license of Oglinda TV, a station with a small audience and poor quality programmes. The National Council of Broadcasting based its decision on statements made by a guest on a live show. The guest openly criticized the Romanian government and the US ambassador, and expressed anti-Semitic and extremist opinions. Shortly after the show was aired, police closed the station down despite a law that gives a licensed station 15 days to appeal the decision. In this particular case, there was no display of professional solidarity because of the miserable image of Oglinda TV in the journalistic community.

The CNA is entitled to regulate the broadcast industry in terms of programmes aired, advertising time and content, and compliance with the terms of the license.

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board, and the contributor's observations.

SERBIA

The most important regulatory body for electronic media is the Broadcasting Agency, or rather the Broadcasting Agency Council (BAC) as its managing body. Its establishment, role and competences are governed by the provisions of the Broadcasting Act.

The role of the Agency is to develop a strategy of development in the sphere of broadcasting, issue broadcasting licences, establish the conditions for operation of broadcasters, protect the interests of minors, and copyrights as well as sanction the airing of programmes inciting discrimination, hatred or violence. Its role is also to monitor the observance of legal provisions on the part of broadcasters.

The independence of the Agency from the authorities is provided by the manner of appointment of nine BAC members elected in the Serbian Parliament upon the proposal of various social actors including NGOs, university, journalists' associations, media associations, parliaments, religious communities, the Serbian Government and the Government of the Autonomous Province of Vojvodina. Council members must be personalities of high repute and credibility, and their election must seek to avoid any conflict of interest. However, the principle concerning the conflict of interests was grossly violated in practice, causing stormy protests by NGOs, the Independent Journalists Association of Serbia (IJAS) along with certain parties from both the opposition and the ruling coalition, and representatives of the international community. This also made the OSCE and EU withhold their assistance for the work of this body. The Broadcasting Agency Council, which was constituted and started operating regardless of the protests, lost its credibility. It is headed by a person whose candidacy made the NGOs and IJAS abandon the procedure in protest.

The Republic Agency for Telecommunications was established by the Law on Telecommunications. Once again,

the law anticipates independence of the agency from any state body. Its task is to manage the broadcasting frequency spectrum in the Republic, define the strategy of telecommunications, issue licences, control the quality and level of services, and prevent disloyal competition and monopolistic activities.

Sources:

The Government of the Republic of Serbia
Association of Independent Electronic Media
Independent Journalists' Association of Serbia
Media Documentation of the Media Center, Belgrade

SLOVENIA

Ministry of Culture; given an important role by the Media Law as the main authority regarding print media (registration, control of ownership and takeovers); also important influence on the work of public RTV Slovenia, seeking an even stronger role.

Broadcasting Council; established by the State Parliament in 1994; five-year term in office, new council appointed in 2001 according to the new media law; regulates radio and television broadcasting with the exception of public radio and television. Seven members including a president.

Council of RTV Slovenija; 25 members, of which five are named by political parties, three by employees, two are representatives of Italian and Hungarian minorities, and 15 members are representatives of different associations and civil institutions, as members of civil society. Regulates the work of public radio and television RTV Slovenija.

Agency of Telecommunications; regulates the frequencies, the technological aspect of broadcasting. The Broadcasting Council has been incorporated (by the Law on Telecommunications) into this Agency.

There are no open conflicts between the regulatory authorities and the journalistic community. However, the debate on how these authorities should be constituted and composed is still going on, especially as regards the role of political parties (overt and covert).

5. Ethical Codes

Ethical Codes

These texts offer a view beyond existence/non-existence of ethical codes, codes of behaviour and similar documents. Comparing media landscapes by the number of existing codes seems useless, therefore the texts below focus on the real place and role of the codes: are codes of journalist behaviour a real factor in journalists' work; who has elaborated those codes (journalist trade unions, NGOs, other); do the media follow ethical codes of their own; how does the journalistic community view those documents, etc. The surprising comparability of the "inside views" arguably suggests that the surface and the deep waters deserve separate approaches in future research and analysis.

ALBANIA

There exists one written code of journalistic behaviour that was agreed upon jointly by the two existing associations of Albanian journalists. There is no form of clear, formal commitment of any medium to observe the ethical requirements of the code, even though some of the main broadcasters tend to abide to most of the code's requirements as a matter of editorial policy.

The Albanian code's primary concerns are the accuracy of information, freedom of information, protection of sources, and protection of individual reputation from undue interferences. The provisions aimed at protecting the interests of subjects other than journalists (readers, sources) clearly outweigh the provisions aimed at ensuring journalists' inviolability and status in their dealings with the government and/or private agents. Such an "altruistic" approach is well conceived and it is intended to benefit the journalistic profession in the longer term by gaining public confidence.

Despite the good intentions of the Albanian Code of Journalistic Ethics, its perceived impact on the way journalism is actually handled in most of the media is limited. The incidence of grave violations of ethical rules is high. Moreover, they (the ethical violations) interest all media regardless of their nature, size or juridical status.

In the face of widespread and repeated violations of the Code's ethical requirements, a degree of cynicism about the real value of the Code is palpable both among the journalists and the wider public. The journalistic community should promptly proceed to identify ways to restore the credibility of the Code as an instrument of self-regulation (e.g. by introducing a Press Council empowered to implement the Code) in order to discourage the growing mood of legislative interventionism in media affairs.

Source:

"Regional Conference on Media Self-Regulation", Albanian Media Institute, Durres, Albania, 2002

BOSNIA AND HERZEGOVINA

The international community has intervened in Bosnia and Herzegovina in the area of media development and ethic code establishment. The code for radio and TV programmes was moved by the Independent Media Commission (now state Communications Regulatory Agency). Under the supervision of and assistance by international institutions, the press code was adopted by journalists' associations, and its implementation is monitored by the Press Council, the journalists' self-regulatory organ. The code of RTV remains a real factor of journalistic practice. Media mainly comply with it. Due to specific conditions affecting journalism during and immediately after the war (hate speech and war-mongering propaganda), the criteria of this code remain highly demanding, often hampering media attractiveness (example: non-engaged and sterile pre-electoral programmes, limited by numerous normative regulations). A number of highly influential newspapers disregard and flagrantly breach the press code of ethic. The reason lies in the fact that journalistic associations have no authority over the media community, nor do they have adequate sanctions at their disposal.

Source:

Media Plan Institute

BULGARIA

At least seven ethical codes (codes of journalist behaviour) have been produced in the past decade, including codes adopted by the two most influential trade unions (Union of Bulgarian Journalists and Podkrepa Union of Journalists in Bulgaria). Most of these texts are based on or compiled from existing codes in Western Europe or the US. Some were drafted in close cooperation with NGOs.

The implementation of these codes depends on journalists and on editorial policy. Arguably, the codes are not implemented in day-to-day journalism. Most journalists do not think they are really important in their work. Without being challenged publicly, these codes are believed to obstruct professionalism. Most journalists consider the concept of minimizing harm as a theoretical issue only.

Codes are not seen as part of media self-regulation and there are no procedures or bodies to enforce them. (Despite some initiatives, there is no self-regulatory body like a Press Council, Press Complaints Commission, Ethic Commission or Journalists Court of Honour; neither is there a tripartite body representing journalists, publishers/owners and the public.)

CROATIA

The Croatian Journalists' Association (CJA) has elaborated and adopted a relatively good Code of Ethics, based on the experience of democratic countries. Anybody who finds a published or broadcast story offensive can complain to the CJA Council of Honour. If the Council finds the journalist in question guilty, it publicly announces how he or she has violated the Code of Ethics. The one and the only problem is that some journalists do not respect the Council of Honour at all, and that publishers, owners and management are not included in this process. Croatian Radio and Television (HRT) and the biggest publishing company, Europe Press Holding, have their own company codes of ethics, but they are hidden deep in the archives and in practice journalists are not even familiar with the ethical rules of the company.

HUNGARY

Editorial independence is one of the most important freedoms of independent and democratic media. However, journalists and broadcasters do not always agree on the scope of this independence. The owners of broadcast companies often claim that it is for them to determine the editorial concept of their television or radio stations. At the same time, journalists also claim that the concrete selection and content of the broadcast programmes should be in the journalists' hands.

Parliament is not obliged to guarantee inner media freedom either by the Constitution or by international treaties. The decision on what and how to broadcast is usually within the scope of codes of ethics. It is for such codes to strike a balance between the interests of journalists and publishers.

In Hungary, all national and several local public and private broadcasters have adopted codes of ethics, including the Association of Hungarian Journalists (MUOSZ). However, in Hungary these codes usually focus less on the protection of journalists against unfair inner influences. They rather lay down the rules on how to conduct professional and non-biased journalism. Typically, in regulating inner freedom, ethical codes cite the Hungarian Constitution and other laws, and also lay down the rules on the freedom and responsibilities of journalists, the cases of violation of professional ethics and their possible ethical consequences. In other words, there is small emphasis in these codes on the internal freedom and independence of journalists. For instance, Article 2 of the Code of Ethics of the Association of Hungarian Journalists from 1993 lays down the rules on "Freedom and Responsibility of Journalists." This section consists of five points, and one of them has in addition four sub-points. From these points, only two short sentences refer to journalistic rights, and they are quotes from the currently valid Press Act. This Code of Ethics was amended in 1994 and 1997. The Association of Hungarian Journalists later agreed with two other professional organizations – the Community of Hungarian Journalists and the Association of Hungarian Catholic Journalists – to elaborate joint ethical guidelines.

In Hungary, typically the codes of operations provide rules ensuring the inner freedom of journalists. For instance, the Public Service Operational Rules of the Hungarian Radio Company Limited By Shares ("Hungarian Radio") devotes one chapter aiming to ensure journalistic inner independence. This is Section XIV on the "Indepen-

dence of Programme Makers.”

According to Point 1 of Chapter XIV, the programme maker (journalist) pursues his obligations independently, in accordance with law and the regulations of the Hungarian Radio. The authorized editor and the management of the Hungarian Radio may only instruct him.

Point 3 of Chapter XIV specifies that the programme maker shall not be forced to produce or cooperate in the production of a programme which is against his conviction.

Chapter XIV, Point 5 provides that in every case when there is an attempt to violate his independence, the programme producer is obliged to report the case to his supervisor. If it is justified, the programme producer may also report such cases to the Board of Trustees of the Hungarian Radio Public Foundation (“Board of Trustees”). Once the management of the Hungarian Radio learns about such cases, it shall immediately report the case concerned to the Board of Trustees.

National and local radio and television stations have been recently using the Visegrad Papers and Guidelines as directions for ethics. These guidelines were edited in line with the conclusions and recommendations of a three-year long process of discussion and debate by members of Hungarian journalism, with the cooperation of the BBC and the Baltic Media Centre. They are practical, hands-on textbooks for Hungarian broadcast journalists, with international case studies, and are used for training or editorial purposes.

Sources:

Code of Ethics of the National Association of Hungarian Journalists

Public Service Operational Rules of the Hungarian Radio Company Limited By Shares (“Hungarian Radio”)

Gabriella Cseh-Gábor Halmai: *The Law of Broadcasting Enterprises in Hungary*, 2001, a study financed by the Federal Ministry of Foreign Affairs and the Federal Ministry for Education, Science and Cultural Affairs of the Republic of Austria

MACEDONIA

At the initiative of the Association of Journalists of Macedonia and the Macedonian Media Institute, a new Code of Journalists of Macedonia was drafted and adopted with consensus on 20 January 2002. The Code has been assessed by the International Federation of Journalists as one of the best and most comprehensive in Europe and beyond. The text defines the fundamental principles of conduct of journalists: freedom of media as an inalienable right, respect of truth, the right of journalists to stop censorship, to protect human rights, dignity, and freedom, to be honest, objective, and accurate. The Code has 17 fundamental principles and ethical values (for example: journalists will respect the laws of the country, will respect privacy of persons, will respect ethnic, cultural and religious differences, will make a difference between facts and opinion, between news and a commentary, and will cherish speech culture and ethics.)

Although there are no exact data on the implementation of these ethical values in practice, still one can take as valid indicators the findings of the project on “Media Monitoring in Macedonia,” as well as information from the proceedings of the Council of Honour of the Association of Journalists of Macedonia, established to ensure that these journalistic principles are really respected. The findings show that journalists “fail” when dealing with human rights and freedoms (especially when dealing with hate speech), accuracy of information, respect of the principle of presumption of innocence in court proceedings, making a difference between news and commentary, professional distance from politicians and parties, etc. On the other hand, the Council of Honour, on many occasions especially during the crisis in 2001, has reacted sharply against reporting by journalists from several media (especially against the texts in the “pro-government” daily newspaper *Vecer*) who “have overstepped brutally and unprofessionally the red line dividing the journalistic profession from a war reporting show game,” and called upon the media not to allow “these and similar unprofessional and dangerous experiments to become a product of their own editorial policy”.

Sources:

Code of Journalists of the Republic of Macedonia, Association of Journalists of Macedonia, Macedonia Media Institute, Skopje, 20 January 2002

Project: “Media Monitoring in Macedonia,” Institute for Sociological and Political-Juridical Research, Skopje

MOLDOVA

In May 1999 a Code of Ethics was developed and endorsed by the Journalists' Union of Moldova (UJM). Several other journalists' associations signed it too. However, that's as far as the Code went. Although the journalistic community avowedly supports the need for ethical conduct, in practice the code is not followed. This is because the purchasing power of the population is low, hence the advertising market is weak, and hence most of the media depend on either political or business actors; most of the media are dependent economically on some patron, and therefore they are not truly free to define their editorial content. The most economically independent are news agencies, among whose clients are embassies and actors from abroad, and which do not depend on advertising. One can say that the agencies' practice approaches ethical professional behaviour; however, as the director of a leading agency, Basa-Press, once said, his ethics is not driven by moral beliefs but rather by the need to put out a quality product for the market.

MONTENEGRO

In May 2002 all relevant media associations in Montenegro signed a Code of Montenegrin Journalists. The Code was adopted by: the Association of Journalists of Montenegro, the Association of Professional Journalists of Montenegro, the Association of Young Journalists of Montenegro, the Association of Independent Broadcast Media of Montenegro – UNEM, the Association of Independent Print Media of Montenegro – MONTPRESS, and the Independent Union of Journalists of Montenegro. The Code was initiated by and formulated with the mediation of the Montenegro Media Institute.

The Code provides for the establishment of a Council as a regulatory body – which, however, was not established in 2002.

Code of Montenegrin Journalists (Basic principles)

- Journalists serve the public interest. The credibility of journalists and the journalistic profession generally rests on professional honesty, integrity and knowledge. It is in the interest of every journalist, and it is his duty, to observe this Code.

- It is the duty of journalists to respect the truth and persistently search for it, having in mind the right of the public to be informed and the human need for justice and humanity.

- Journalists are obliged to defend the freedom and the right to collect and announce information without hindrance, as well as the freedom to comment and criticize. Journalists should be sharp observers of those who have social, political and economic power.

- It is the duty of journalists to complete an incomplete and to correct incorrect information, especially information that can cause harm, and at the same time to make sure that the correction is indicated in an adequate manner.

- In order to collect information in any form, journalists should use professionally honourable and lawful methods.

- It is the right and duty of journalists to protect confidential information sources, but also always to check the motives of a confidential source before promising anonymity and protection.

- Journalists should not accept privileges of any kind that could limit or call into question their autonomy and impartiality, and affect the freedom of publishers and editorial boards to make decisions.

- Just as they are ready to expose their work to public judgment, journalists should be willing to expose themselves to judgment by an impartial body, which is in charge protecting the authority of the journalistic profession.

Guidelines on the interpretation and implementation of the basic principles of the Code can be found at <http://www.mminstitute.org/kodexeng.php>.

None of the media have a special code or relevant body of their own.

Sources:

Code of Montenegrin Journalists, Podgorica 2002, Montenegro Media Institute, www.mminstitute.org

ROMANIA

The different associations or trade unions have proposed approximately 15 different professional codes. Unfortunately, the journalistic community has failed to produce an effective code, accepted by the majority. The Romanian Press Club (CRP) is one of the most influential associations, acting as an editors and publishers/owners club. The CRP has its own ethical code, but it has failed in enforcing it even for its own members. As a collegial body, the CRP lacks the mechanisms for implementing those rules. The Hungarian Journalists Association has its own code and an operational body (College of Honour) to enforce it, serving as a model for others. Other organizations, such as specialized NGOs or trade unions, have proposed ethical rules but the effect is mostly limited. Certainly, most Romanian journalists do not think that these documents are of real importance in their work. In December 2002, twenty-five media organizations agreed to join an initiative for common action, called the Convention of Media Organizations in Romania, aiming to achieve some professional goals and to improve self-regulation. In a separate move, the Association of Broadcasters – ARCA – started to work on their own code of conduct.

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board, and the contributor's observations.

SERBIA

The Independent Journalists' Association of Serbia (IJAS) and the Association of Independent Electronic Media (ANEM) have both adopted their respective ethical codes. The one of Independent Journalists' Association of Serbia is modelled on the BBC Code, while the one developed by ANEM is primarily intended for electronic media and has been drafted in cooperation with media experts of the CoE and OSCE. These codes provide the framework for defining what the media are not allowed to do and prescribe the rules of permissible conduct. However, these codes have never been enforced – not only because, for example, the IJAS covers only 17% of all journalists, but also because the issue of journalist ethics has never been put forward as one of crucial importance for journalist practice. The IJAS and the Journalists' Association of Serbia (JAS) each have a Court of Honour, but they practically do nothing and have no arbitrary or real power or influence. The idea to introduce a licence for journalist work and the sanction of revoking the licence in the event of violation of the ethical code, failed to elicit wider support.

Sources:

Independent Journalists' Association of Serbia
Journalists' Association of Serbia,
NGO Committee of Lawyers for Human Rights

SLOVENIA

The Slovenian Association of Journalists adopted a new code of ethics (the old one was from 1991) in autumn 2002. This code is mostly accepted by journalists – however, a number of them are not members of the Association. Still, public and professional awareness that free trips, gifts and especially mixing PR and journalism are not acceptable has increased in recent years. There has also been an increase in the number of public debates regarding the role and behaviour of journalists, editors and owners, with a focus on covert advertising, intrusion of privacy, disclosure of sources and secret documents.

The public RTV Slovenija in spring 2000 also adopted its own (the only in-house) code of ethics, detailing the behaviour of journalists and editors in public broadcasting.

6. Access to Information

Access to Information

The issue of access to information in the region certainly cannot be considered to have been resolved. Hence the texts below focus on practical implementation of the concept: quality of the legal framework on access to information; practical value of the legal framework; cooperation between the media and NGOs; lawsuits initiated by journalists or NGOs against state authorities (if any); cases or examples illustrating the importance of the issue in a respective country.

ALBANIA

The Albanian Constitution of 1998 recognizes the right to information, and in June 1999 Albania adopted the Freedom of Information Act (FOIA). This law, along the lines set by the Constitution, provides the conditions, procedures and timelines for granting access to information to the ordinary Albanian citizen.

The basic principle of the FOIA is a strong presumption of the availability of documents for scrutiny. According to the law, the withholding of official documents is to be an exception which can be upheld only if it is clearly prescribed by another law (e.g. the classified information law authorizes the public authorities to withdraw from the public eye those official documents which, if divulged indiscriminately, may pose a threat to national security).

Another important principle of the FOIA is that the person applying for copies of official documents is not required to reason his or her request. On the other hand, any refusal by the authorities to provide FOIA applicants with the requested information must be accompanied by a written statement giving the reasons and the legal grounds for the refusal. Under the FOIA the public authorities are obligated to provide the applicants with information that is updated and manageable in terms of format. Certain categories of documents are to be made available to the public without any specific request. The issues of timelines and service fees have also been regulated in a satisfactory way. Overall, the quality of the legal framework on access to information may be considered to be up to Council of Europe and European Court of Human Rights standards.

However, there is a stark discrepancy between the high standards of the FOIA and its actual implementation. Government institutions are failing to observe the FOIA. That is also demonstrated by the internal regulations of those institutions in this respect.

Drafting such regulations was recommended by the Albanian Human Rights Ombudsman, who according to the Freedom of Information Act plays a "soft" supervisory role in regard to freedom of information. However, the drafted regulations reveal a profound misunderstanding of the nature and aims of the law and do not respond to such practical concerns as the need to format the FOIA requests, the need to indicate specific rate schedules for the different FOIA services, and so on.

On the other hand, the public (including journalists) has been unable to avail itself of the excellent legal framework due both to the absence of a detailed regulation of the FOIA procedures and a certain lack of civic initiative. Until December 2002 (when a National Conference on the Freedom of Information was held), FOIA-related court action was zero.

However, pressure is mounting for better implementation of the FOIA, in particular on the part of NGOs. NGOs have also managed to get reasonable media coverage of their FOIA activities. Some TV programmes on investigative journalism are a direct result of the use by the journalists of the FOIA. For the time being, getting information on official documents only works if the request is backed by the media or comes in the framework of wider project. Individual requests are disregarded.

Sources:

National Conference on Freedom of Information / December 2002

Annual Report of the Ombudsman

Freedom of Expression: The Law and Case Law, Institute for Public & Legal Studies

BOSNIA AND HERZEGOVINA

All physical and legal parties in Bosnia and Herzegovina are provided with free access to information. The Bosnia and Herzegovina Law on Freedom of Access to Information, as well as the legal framework in general, is in line with the latest trends and standards in the best international legislation in this sphere. However, its practical value is somewhat diluted because all institutions have not performed adequate preparations for the implementation of this legislation, therefore citizens do not use it on the intended scale. Regardless, there is visible progress thanks to the efforts of foreign and domestic non-governmental organizations and ombudsmen institutions. No cases have been recorded of lawsuits against public institutions over failure to comply with these laws, probably due to the fact that applicants – in cases when they were denied requested information – approached Ombudsmen for information and received support which helped them obtain the needed information. In the first 12 months after the enforcement of the Law on Freedom of Access to Information (October 2000), Federal Ombudsmen intervened in 66 such cases; in all cases except three (due to the non-existence of information) they managed to provide access to the information needed.

Source:

Federation Media Ombudsman

BULGARIA

The Law on Access to Public Information (LAPI) is structured around principles of right to access to information; it sets clear rules for publicity of acts of public interest; it also includes penal provisions on denial of access to information. This Law does help the media in their attempts to obtain information and to exert pressure on the executive. However, the Law has suffered badly from the vagueness of the terms used, which allows broad freedom of interpretation. Also, penalties for violations of the LAPI would not scare anybody. (For tacit refusal a press office director is liable for a fine of BGN 20 to 50, approximately USD 10 to 25.) In case of denial, access to information might be obtained through the court, but this is a difficult, slow and costly procedure – and, at that, a procedure that will not necessarily ensure “access.” Lawsuits on the grounds of the Law on Access to Public Information are a means which the media could hardly employ. Only a fraction of the lawsuits filed under the LAPI have been filed by media. The majority have been filed by NGOs, including lawsuits filed against the Ministry of Economy, the Ministry of Labour and Social Policy, the Ministry of Education and Science, the Ministry of Environment and Waters, the Road Executive Agency, the National Health Insurance Fund, the Central Electoral Commission, the Public Internal Financial Control Agency, and even against the Prosecutor General of the Republic.

(In 2001 *Capital* weekly journalist Lazarov was refused access to the records of a government meeting and filed a lawsuit. The case passed through various procedural technicalities, including a Supreme Administrative Court ruling, the Council of Ministers appealed against the Court judgment, etc. Despite court judgments defining the Council of Ministers’ refusal a “gross violation” of the LAPI, by 2003 Lazarov had not been granted a copy of the records.)

Long-existing problems with access to information have forced the media to seek and obtain information by unofficial means, using other – sometimes unreliable – sources. As a result, rumours and gossip are often splashed on front pages.

CROATIA

A Law on Access to Information was adopted by the Croatian Parliament on 29 October 2003. This was done because of the pressure exerted by NGOs and primarily the European Union. In their everyday work journalists throughout Croatia have serious problems with the local administration, which is unwilling to provide requested information. The new Law should change this attitude, but journalists remain very sceptical about its implementation.

HUNGARY

Act LXIII of 1992 on the Protection of Personal Data and the Disclosure of Data of Public Interest ("Act") provides the basic legal framework regulating data protection and freedom of information.

The Hungarian Act belongs to the most advanced generation of this family of legal documents, not so much for the technical execution of its language as for its conceptual framework and philosophy. In this regard the following four distinctive features of the Act must be highlighted. The Hungarian Act:

- essentially disregards the physical attributes of the data medium, making no distinction between data controlled by traditional methods and by electronic methods (e.g. computer);
- lumps various data controllers together as a general category, meaning that it is equally protecting natural persons, NGOs, governmental and non-governmental agencies, including the media;
- is in compliance with European Union and Council of Europe regulations and recommendations;
- in line with international standards, it is not really an act of data protection, but rather a law on rights to freedom of information. As such, it governs not only the protection of personal data, but also the guarantees of freedom of information. This solution ensures that these two rights enjoy equal protection.

Data protection and freedom of information case law

According to the Hungarian experience, data protection and freedom of information cases may be classified in the following ways.

A. Personal Data

The most important personal data controllers of the state are such as the following:

Police, national security services, courts, local governments, tax authorities, the Central Statistical Office, social security records.

Sectoral data controlling may typically occur in the areas of health, public services, employers, communications companies, banks and financial institutions, mail order and marketing companies, the media and archives.

Other typical case categories are cases involving ethnic and other origins, private individuals as data controllers, condominium associations and crisis intervention.

B. Data of Public Interest

Freedom of information

Data of public interest handled by local governments;

Public funds;

The personal data of public figures.

Only a small number of cases reaches the courts, as in compliance with the Act most complaints are reconciled and dealt with by the Commissioner's Office.

Sources:

Act on the Protection of Personal Data and the Disclosure of Data of Public Interest

The First Three Years of the Parliamentary Commissioner for Data Protection and Freedom of Information, Budapest, 1998, published by the Office of the Parliamentary Commissioner for Data Protection and Freedom of Information, and other annual reports published by the Commissioner's Office.

MACEDONIA

Macedonia does not yet have a law on access to information. Presently, a commission made up of representatives of the Government, the Justice Ministry, the Legislative Secretariat, the Ombudsman, the Broadcasting Council, the Association of Journalists of Macedonia, the Institute for Sociological and Political-Juridical Research, and the NGO sector (Media Development Center, ProMedia), and assisted by Transparency Macedonia, has drafted a working version of this law which will be submitted for public debate and for evaluation by the Council of Europe. Otherwise, the present Law on Broadcasting regulates with one of its articles (Art. 64) access to information. This article says in general that broadcasting organizations should be granted access to information.

In practice, many media, especially the smaller local private radio and TV stations, remark that very often they have serious difficulties in accessing relevant information and are therefore forced to do this in any possible way. Even the state institutions (ministries, state agencies) select whom to invite to their press conferences about important social questions and problems.

Notes:

The draft version of the law establishes the procedure to realize the right to free access to information of public character that is kept by the state institutions, units of local self-government and the City of Skopje, public institutions and services, and natural and legal persons who exercise public authorizations established by law. According to the law, every natural and legal person in the Republic of Macedonia has the right to free access to information of public character.

Sources:

The working version of the draft Law on Free Access to Information of Public Character

Documentation of the Broadcasting Council

MOLDOVA

Vasile Spinei, MP at the time the Access to Information Law was adopted and the Law's chief champion (he now heads the NGO Access-Info, which deals with promoting the implementation of the Law), says that this is a very good law if we take into account the political environment at the time of its adoption. However, he also recognizes that there are major problems with its implementation.¹ First, many employees of public institutions are not aware of the Law. Another problem is the mentality of secrecy and suspicion that public functionaries still retain. Then, there is little awareness among the population that they have the legal right to request public information. A practical problem with the implementation of the Law is the lack of resources for specialized staff and copying equipment at public institutions, necessary to fulfill information requests.²

The *Timpul* weekly sued the Ministry of Education in February 2003 for the authority's refusal to supply background information on the minister. In this suit the newspaper cooperated with the Media Law Unit of the Independent Journalism Center. *Timpul* lost the case due to the judge's prejudiced and unfair manner of conducting the suit.³ This seems to have been the first access to information lawsuit against a public authority.

Sources:

¹ Personal discussions with Vasile Spinei.

² Eugen Urusciuc, "Monitoring the Access to Information Law Compliance in the Balti County (January 13 - February 13, 2003)." In: *Mass Media in Moldova: Analytical Bulletin*, July 2003, Independent Journalism Center.

³ Olivia Partac, "Some Aspects of Access to Information Law Enforcement or Several Lessons from the First Law Suit Based on It." In: *Mass Media in Moldova: Analytical Bulletin*, July 2003, Independent Journalism Center.

MONTENEGRO

In 2002 Montenegro had no law on free access to information, which made the gathering of information difficult. Therefore a working group consisting of NGO representatives has been constituted to draft such a law. There has been direct cooperation between the Government and the NGO sector in this respect.

For that reason, the Montenegro Media Institute has launched a project (at the end of 2002) on publishing *Key Contacts at Public Institutions in Montenegro*. The main goal is to support the process of opening up of state institutions not only to the media but also to the public, in the broadest sense of the word. This book, as well as an address book of Montenegrin media, is aimed to bridge the gap between journalists and public institutions, and facilitate access to information.

Source:

Montenegro Media Institute

ROMANIA

Romania adopted a Freedom of Information Act (FOIA) in 2001. The law started as an NGO initiative, and the government (Public Information Ministry) and the opposition (Liberal Party) collaborated on its adoption. While the adoption procedure itself was quite speedy (February to October 2002), the implementation process proved difficult and ran up against an unreformed administration and narrow-minded officials. The Public Information Ministry launched a public campaign for promoting this law; also, the Liberal Party conducted its own campaign in the same direction. Despite those efforts, one year after the FOIA was enacted it was implemented partly and superficially in 2/3 of the institutions; 1/3 of the administration implemented *formally* its basic provisions, and only 15% of the public administration implemented *substantial* aspects of the law.

Some successful lawsuits based on the FOIA have already taken place. The Romanian Helsinki Committee won a lawsuit against the State Prosecutor, who had refused to provide statistical data about the granted permissions for phone tapping. The State Prosecutor did not apply the judges' decision and the Committee sued him again in order to force him to observe the law. The same Committee won a lawsuit against the Finance Ministry, which finally sent the requested information.

Unfortunately, there are some limits of access to information. The law is not clear in targeting the so-called National Companies, which use entirely public funds. Some of them have refused to give information, taking advantage of those unclear provisions. The law needs some changes in order to incorporate the principle: public money = public information.

Sources:

For FOIA implementation, the source is a survey conducted by the Romanian Academic Society: "Last Year of Obscurity, First Year of Transparency?" (www.sar.org.ro. Democratic Governance and FOIA section).

For limits of access to information: "Transparency for an Independent Media," study conducted by the Romanian Academic Society (www.sar.org.ro).

SERBIA

Although the Law on Public Information includes a provision obliging all institutions of the state and government to grant the media access to all information, the Serbian Government was pressured by the media community into drafting a law on free access to information. The relevant bill was prepared in September 2003 but has not been adopted yet. The very fact that the media community insisted on the urgent adoption of this legislation reveals the existence of fundamental mistrust between the media and the authorities and the fact that – notwithstanding the high transparency of state institutions' work (e.g. TV B92 has live coverage of all auction sales of state and socially owned enterprises in the privatization process) – journalists encounter major problems in obtaining relevant or verified information. This applies particularly to reporting on affairs related to the Serbian Government. That is why the media frequently print unchecked information, denials, and contradictory statements, all of which creates a general atmosphere of mistrust and misinformation. Not infrequently media outlets are faced with "closed doors", i.e. have difficulties in approaching government institutions or individual politicians.

Source:

Media Center, Belgrade

SLOVENIA

After a lengthy public debate, the Law on Access to Information was finally adopted in early 2003. However, a number of NGOs are not satisfied with the level of transparency of information and public documents. Access to information for journalists is regulated by the Media Law (Chapter 7, Article 45), but the article in question is very general and includes a number of limitations. Besides, it does not provide clear deadlines for the disclosure of public information and documents. This poses a problem for journalists with clear time-limitations and (usually daily) deadlines.

7. Media Capital Concentration

Media Capital Concentration

Explicit restrictions in the legal framework on media capital concentration are of serious importance for understanding developments in the media field. Even a brief presentation of the legal provisions on the issue could be of use in forecasting possible trends. The following short presentations offer a good starting point for discussion on the way the State is inclined to protect independence and non-monopolization of the media field as a whole – an extremely painful issue that is already on the agenda of the societies in the region.

ALBANIA

Ownership of print media is not restricted by any legal provision. However, the general fair competition provisions of the respective legislation apply to this market as well. One daily newspaper has been accused of selling its products at dumping prices. At a certain point this issue prompted a parliamentary debate. However, no legal action against the presumed dumper was taken by the competitors or the monitoring agency.

On the other hand, ownership of electronic media is regulated in detail by Law No. 8410 “On the Public and Private Radio and Television in the Republic of Albania.” According to the law, different ownership regimes apply to national broadcasters and local broadcasters. A national broadcaster has to be incorporated as a limited liability company. The stake of one individual shareholder (the shareholder can be a physical person or a juridical person) may not exceed 40% of the total share value. Additionally, those physical persons that hold shares in one national broadcaster may not hold shares in another national broadcaster.

Ownership of local broadcasters is limited in the following fashion. A person or a legal entity may not be granted more than two licenses (covering two local broadcasting zones) for local broadcasting.

The present legal arrangements do not preclude any form of networking, which has already been experimented by some televisions that are economically powerful but are licensed for local broadcasting.

Sources:

Official Journal

“Electronic Media Law in Albania,” Imholz, Kathleen, Elina Koçi & Robert Rittler, January 2001

BOSNIA AND HERZEGOVINA

As for electronic media, in June 2003 the CRA proposed a draft Rule in relation to media concentration, which deals with horizontal and diagonal media concentration. This draft was offered for public consultations from June to end August 2003. After collection of all comments received, the CRA presented this draft to the CRA Council on 22 September 2003.

Source:

Communications Regulatory Agency – CRA

BULGARIA

Media capital concentration issues are regulated by the Law on Protection of Competition (LPC). The Law prohibits abuse of monopoly situation and dominant position on the market. (According to the LPC, an enterprise is in a monopoly situation if the said enterprise enjoys by law the exclusive right to carry on a particular type of business. An enterprise may be placed in a monopoly situation solely by statute in the cases where such a privilege is conferred on the State. An enterprise is in a dominant position if, in view of the market share, financial resources, accessibility to the market, technological level and business relations with other enterprises, the said enterprise may hinder competition on the relevant market because it is independent of the competitors, suppliers or purchasers

thereof. An enterprise may be presumed to be in a dominant position if it holds a share exceeding 35% of the relevant market.) According to the Law, "It shall be prohibited for any enterprise placed in a monopoly situation or dominant position, or for two or more enterprises jointly placed in a dominant position, to perform any act whereof the purpose or result shall be prevention, restriction or distortion of competition and/or injury of the interests of consumers," such as: "direct or indirect imposition of unjustified purchasing or selling prices or other unfair trading conditions."

This legal framework was tested in practice in the case of German conglomerate Westdeutsche Allgemeine Zeitung (WAZ). In 1997 WAZ bought the companies 168 Chassa and Media Holding, publishers of the two largest-circulation dailies in Bulgaria: *24 Chassa* and *Dneven Troud*. The Commission on Protection of Competition established that *24 Chassa* and *Dneven Troud*, controlled by WAZ-Bulgaria, had a dominant position on the national dailies' advertising market, holding a joint market share of 45.9 % of advertising space and 58.4 % of advertising revenues. The Commission banned their concerted practices on the grounds that they restricted competition on the advertising market by indirectly imposing prices of advertising services. However, the Supreme Administrative Court revoked the Commission's ban on procedural grounds.

Sources:

Law on Protection of Competition, adopted in 1998.

Supreme Administrative Court Judgement No. 6810 dated 15 October 1999 on Case at Administrative Law No. 119/99.

CROATIA

Ownership of national electronic media is allowed if the ownership at any other regional, county and city level does not exceed 25% and vice versa. The Law on Electronic Media does not allow any ownership in dailies with a circulation above 3,000 in the cases when the owner has a concession for electronic media on the national level and vice versa. Ownership in electronic media also excludes owning more than 10% of any news agency. If a certain person has a concession on the national or regional level, he cannot hold a more than 30% share in any similar media. Telecommunication operators cannot at the same time be producers of radio or television programmes.

As regards restrictions on capital concentration in print media, the new Law on Media does not allow a publisher of one or more daily newspapers or newsmagazines, whose sales exceed 40% of the total sales on the print media market, to own or have a share in other print media.

Source:

Law on Electronic Media

HUNGARY

Regulations against media concentration

Within the framework of the Media Act and Act LVII of 1996 on the Prohibition of Unfair and Restrictive Market Practices ("Competition Act") it is possible for broadcasting companies to acquire shares and to merge with each other. However, Section 109 of the Media Act stipulates that broadcasting rights are not transferable. The same article of the Media Act requires broadcasters to report to the NRTC (National Radio and Television Commission) if there is any change in their ownership, and to make a statement that the change in their ownership does not violate the Media Act.

According to the practice of the NRTC, notwithstanding the broadcaster's statement, the NRTC investigates whether the planned acquisition and merger ("A&M") cases are contrary to the Media Act. If all of the conditions prescribed by the Media Act are satisfied, the NRTC amends the broadcasting contract concerned.

The investigation of the impact of planned A&M transactions on the market is within the competence of the Hungarian Competition Office ("HCO") and is based on the Competition Act. The Hungarian Competition Act covers both restrictive competition practices (antitrust law) and unfair market practices of undertakings. More concretely, it governs unfair market practices, unfair manipulation of consumer choice, and anti-competitive agreements of undertakings, merger control and the status and procedure of the HCO. The HCO proceeds against infringements of the prohibition of unfair manipulation of consumers' choice, anti-competitive agreements and the abuse of dominant position. In the case of the abuse of dominant position the HCO applies the "abuse principle." Accordingly, a dominant position in the market is not deemed to be illegal *per se*, only the Competition Act prohibits

the actual abuse of such position. Ordinary courts have jurisdiction over unfair market practices cases (Chapter II of the Competition Act). The procedure of the HCO may be based upon a notification and the HCO may decide to initiate an investigation on its own motion. At the same time, applications may be submitted to the HCO aiming to initiate an authoritative procedure, such as the authorization of the concentration of undertakings, or negative clearance. Negative clearance means that the undertaking(s) concerned invite(s) the HCO to declare that an agreement is not contrary to the Competition Act. The resolutions of the HCO may be challenged at the Metropolitan Court.

Merger control

According to the Competition Act, merger control procedure is based upon an obligatory preliminary authorization system. This means that concentrations that involve undertakings with turnovers above the thresholds specified in the Competition Act, have to be notified to the HCO for approval.

The Media Act does not contain specific rules on A&M transactions in the media market. Chapter VIII of the Media Act sets forth the rules on controlling of ownership structures. As a result, besides the ownership rules specified in Chapter VIII, the Competition Act serves as the basic legal source that governs A&M transactions of media enterprises.

Rules against the accumulation of licenses

Section 86 Paragraph 5 and 6 of the Media Act stipulates:

“(5) Those entitled to broadcast on the basis of a contract or reporting may simultaneously be entitled to perform, at the most,

- a) one national broadcasting service, or
- b) two regional and four local broadcasting services, or
- c) twelve local broadcasting services.

(6) The restriction defined in subsection (5) shall not apply to specialized broadcasting...”

Sources:

Media Act

Gabriella Cseh-Gábor Halmai: *The Law of Broadcasting Enterprises in Hungary*, 2001, a study financed by the Federal Ministry of Foreign Affairs and the Federal Ministry for Education, Science and Cultural Affairs of the Republic of Austria

MACEDONIA

The present Law on Broadcasting imposes restrictions against media concentration:

A legal and natural person may be founder of just one commercial company (radio or TV) and a co-founder of just one more commercial company (radio or TV) with, at the most, up to 25% of the total capital of that company (Art. 10)

A legal and natural person the activity of which is in the field of the press may not establish an organization and carry out broadcasting, while a broadcasting organization may not establish an organization and carry out activity in the field of the press (Art. 11)

A founder, i.e. a co-founder of a broadcasting organization may not establish an organization and carry out broadcasting, while a broadcasting organization may not establish an organization and carry out activity in the field of the press (Art. 11)

A founder, i.e. a co-founder of a broadcasting organization may not be a political party, religious community and religious group, as well as holder of public office or office of a political party (Art. 11)

A commercial broadcasting company for carrying out a broadcasting activity on the territory of the Republic of Macedonia may be given just one concession (a permit) for radio and TV, and for carrying out a broadcasting activity on local level, in different regions respectively, at the most two concessions may be given, one for radio and one for TV (Art. 17)

For a determined region, a permit for concession for cable radio-television network may be given to just one concessionaire (Art. 65)

An owner of a cable radio-television network may not be a concessionaire of a broadcasting organization or a shareholder in a broadcasting organization (Art. 65)

Source:

Law on Broadcasting, *Official Gazette of RM*, No. 20/97

MOLDOVA

There are certain ownership restrictions for both print and broadcast media (print media also include news agencies, as the Press Law treats both equally; broadcast media are regulated by the Broadcast Law). Thus, foreign individuals or companies may own not more than 49% of a print medium (Press Law). Moreover, foreign governments are banned from proffering any support to print media, except for cases when bilateral agreements to this effect exist between the Moldovan and another government. Also, only a citizen of Moldova may be editor-in-chief of a publication or news agency (Press Law).

In the case of broadcast media, foreign ownership is banned except when a broadcaster is set up by a joint venture containing both Moldovan and foreign capital (no quotas specified – Broadcast Law). A single shareholder in a broadcaster, whether individual or business, may own more than 50% only in one broadcast outlet, and not more than 20% in other broadcast outlets (Broadcast Law).

Also, telecommunication businesses and those running broadcast communication networks are banned from owning or co-owning broadcast outlets (Broadcast Law).

It is difficult to assess the compliance with these legal requirements as ownership information is “top secret” in the media in Moldova. However, some newspapers are allegedly supported by the Romanian government, and one Canadian businessman allegedly owns two broadcasters and one or two newspapers. Also, the government of Moldova technically owned, until the Law on the Public Broadcaster was adopted in July 2002, the National Radio and the National TV. The City of Chisinau too owns a radio and a TV station, which is technically in violation of the ownership restrictions.

MONTENEGRO

The existing Media Law does not deal with media ownership and capital concentration. Nor has any working group been set up so far to draft provisions on this issue.

Sources:

Media Law, *Official Gazette of the Republic of Montenegro*, No. 51 of 23 September 2002
Montenegro Media Institute

ROMANIA

The Broadcast Law stipulates some restrictions (Art. 44): one owner cannot have a dominant position, meaning that its market share cannot exceed 30%. The state-owned stations are explicitly excluded from this particular provision of the law. Also, an individual or a firm can be the main shareholder in one station only. The print media has no such regulations.

To date, the State has not adopted an active policy preventing capital concentration in the media. Media Pro, the most important private media company, owns the first private TV station (Pro-TV), a radio station (Pro FM), one newspaper, several magazines, and the leading news agency (Mediafax).

SERBIA

The Broadcasting Act prohibits media concentration, i.e. no broadcaster may share in the capital of another broadcaster or company publishing a print media, and vice versa. However, this provision is evaded in practice by means of establishment of “sister companies.” Furthermore, a broadcaster is permitted to air programmes in the Serbian language alone, unless the programme concerned is intended for a national minority, while foreign programmes have to be translated. A broadcaster must broadcast own programmes at least 50% of its total transmission time, half of which must be produced in the Serbian language. Radio and TV stations broadcasting for national minorities must also produce at least 50% of their programmes.

Broadcasting licences may not be obtained by political parties, organizations or coalitions, or legal entities established by political parties. Furthermore, a licence may not be given to enterprises, institutions or other legal

persons established by the Republic or autonomous province, except for the institution of the public broadcasting service. The PBS must ensure quality reception to at least 90% of the country's population, while the commercial broadcasters must provide quality reception for a minimum of 60% of the population.

SLOVENIA

The Media Law, adopted in 2001, limits cross-ownership: A publisher of a general daily newspaper (and those who own more than 20% percent of such a publisher) cannot be an owner of a radio or television station, and an owner of a radio or television station cannot publish a general daily newspaper. A publisher of a general daily newspaper, radio or television programme can also own maximum 20% of any other such publisher. The Ministry of Culture must give permission to a company or person which wants to gain 20% or more of a daily newspaper, radio or television station.

8. Restrictions on Media Activities

Restrictions on Media Activities

Restrictions and bans of various kinds on media activities exist in every country. Among these are restrictions that seem obvious and self-evident, restrictions involving criteria of fair journalist practices, the morals, ethics, or restrictions stemming from particular experience in the media field. An overview of restrictions does not necessarily mean an overview of the Penal Code; it is, rather, a way of presenting parameters of media freedom “in a negative way,” and from a more general point of view. Therefore, the question of restrictions is of significant public importance. Be these explicit provisions banning particular media; restrictions concerning foreign media, bans based on language, bans on media policy issues, politics, pornography, etc. Describing the media environment without this background limits the objectivity of the general picture.

ALBANIA

National broadcasting licenses can only be awarded to limited liability companies incorporated in the Republic of Albania. However, this does not amount to a ban on foreign ownership or capital. According to Albanian law, a broadcaster (both local and national) may be 100% owned by foreigners. The only real limitation applies to the level of shares that may be owned by a single person (juridical or physical).

Political and religious organizations, as well as public authorities, banks and other financial institutions may not apply for a broadcasting license. Article 34 of Law No. 8410 “On the Public and Private Radio and Television in the Republic of Albania” authorizes broadcasting in the languages of minorities. Additionally, broadcasting in other foreign languages is permitted through the use of special licenses that authorize the broadcast in Albania via terrestrial booster transmitters of the signal of foreign stations.

The following programmes are banned:

- programmes that incite violence, ethnic, religious and racial hatred, anti-constitutional acts, the territorial partition of the country and discrimination;
- programmes that disseminate classified information in accordance with the law;
- programmes that intrude the private sphere of life of individuals;
- encoded programmes;
- pornographic programmes.

On the other hand, licensed broadcasters are obliged to air free of charge certain announcements related to issues of public interest (natural disasters, public health, public order, etc.) in accordance with the rules and procedures provided by the National Council of Radio and Television. In election time, private broadcasters have to sell airtime at prices that are equal for all parties and are announced publicly beforehand. The public broadcaster provides coverage for free during elections.

Several other bans apply to the advertising of alcohol, medical and military equipment, etc.

Source:

A Guide to Electronic Media Legislation in Albania, Institute for Public & Legal Studies/ January 2000

BOSNIA AND HERZEGOVINA

The Law on Media explicitly prohibits the distribution of press which “poses a threat to security and territorial integrity of the country, inflames racial, ethnic or religious hate or animosity, spurs on criminal acts and propagates or supports acts against humanity” (Article 55, Law on Media, Sarajevo Canton, similar in other Cantons, too). These are the only prohibitions specified by the law.

Source:

Federation Media Ombudsman

BULGARIA

According to the Constitution, “A suppression and seizure of a print publication or of another information medium shall be admissible solely in pursuance of an act of the judiciary, by reason of moral turpitude or incitement to a change of the constitutionally established order by force, to the commission of a criminal offence, or to personal violence” (Art. 40). Since 1989 no cases of suppression or seizure have been reported.

Radio and TV operators are subject to licensing procedures (but it was only in April 2002 that the first unlicensed radio station was closed down).

National TV and National Radio are subject to specific restrictions as “public” electronic media, e.g. obligations to offer time for public addresses to a number of state institutions, prohibition of the so-called “external productions” to deal with political issues, and obligatory use of the national language. All media are subject to restrictions under the election law – provisions banning the announcement of exit poll data on Election Day.

Most of the restrictions concern the state-controlled media, in effect broadening the gap between the state-controlled and the independent media. For instance, announcing results of exit polls before the end of Election Day is strictly banned. The independent Darik Radio has successfully skirted this ban (using a clever and funny play encoding exit poll results – an impromptu musical competition in the studio, in which a particular song stands for a particular political party). However, the state-controlled National Television and National Radio certainly cannot take this liberty. Besides, Bulgarian National Television and Bulgarian National Radio are obliged to offer time for free for campaign debates.

There are also restrictions concerning pornography and violence (such programmes may be broadcast within a specific time slot, mostly late at night).

CROATIA

The Law on Electronic Media stipulates that material aired by electronic media must be in Croatian, except for all kind of programmes for ethnic minorities. The Republic of Croatia can restrict the airing of programmes that are produced in the European Union if such programmes violate the main principles defined by this law (protection of minors, especially if the programme includes pornography and violence, etc.). Restrictions are also in force if the programme incites to hatred on grounds of race, sex, religion or nationality.

Source:
Law on Electronic Media

HUNGARY

In Hungary, some restrictions exist which hinder the development of a free, democratic and healthy media environment and market. They are associated foremost with legislative problems and the way the Media Act is applied or not applied in practice.

During the past few years, mainly as a result of (i) political distrust amongst the parliamentary parties especially in the field of media, (ii) the development of converging technologies, (iii) interpretation problems of the Media Act, (iv) harmonization of legislation with the *acquis*, and (v) existing loopholes in the Media Act, there was an agreement in the media community on the necessity to amend the Media Act currently in force. Accordingly, the Hungarian government ordered a conceptual study on the preparation of a new Media Act, which was published for debate in September 2003.

Areas for significant reforms include: the governance of public service and commercial media; the organizational structure of public service media; the size of the public service broadcasting market; financing public service broadcasters and broadcasting; the possibility of advertising in public service broadcasting; ownership rules; licensing; harmonization with national and international communications legislation.

MACEDONIA

The Law on Broadcasting provides for the following:

Bans relating to politics:

State bodies and bodies of local self-government, as well as their representatives, may not exert influence on the creation of programmes on radio and TV, and on their operation (Art. 34)

The overall content of the programme may not serve one-sidedly for certain political parties and for certain interests (Art. 32)

Bans relating to pornography and violence:

The programme must not show indecent contents, especially those with pornography and violence. The programme may not show contents that may harm the physical, spiritual, or moral development of children and youth. Films and other shows that can harm the psychological and physical development of children and youth, may be exhibited only in the period between midnight and 6 AM (Art. 35)

With regard to the language, there are no restrictions; on the contrary:

Broadcasting organizations broadcast their broadcasting programme in Macedonian language. The public broadcasting company that broadcasts programmes on the territory of the Republic of Macedonia, in addition to broadcasting programmes in the Macedonian language, broadcasts also programmes in the languages of the ethnic minorities. In regions where ethnic minorities are a majority or persons belonging to ethnic minorities make up a considerable number, public broadcasting enterprises that operate on local level broadcast programmes, in addition to the Macedonian language, also in the languages of the said ethnic minorities. The commercial broadcasting companies, in addition to broadcasting programmes in Macedonian, may also broadcast programmes in languages of the ethnic minorities (Art. 45)

With regard to foreign broadcasting organizations on the territory of the Republic of Macedonia, the law provides that:

A foreign legal and physical person may become co-founder of a broadcasting organization under terms and conditions set forth by this and other laws (Art. 5)

The assets of several foreign legal and natural persons, as co-founders, in one trading broadcasting company may be up to 49% at the most of the total capital of the company (Art. 10)

Notes:

With regard to the language, many private radio and TV stations, especially in regions inhabited by persons belonging to the ethnic minorities (such as: Skopje, Tetovo, Gostivar, Kumanovo, Debar, Kicevo), "make use" of the right codified in Article 45 and broadcast programmes in Albanian, Romany, and Turkish.

Sources:

Law on Broadcasting, *Official Gazette of RM*, No. 20/97

Bulletin of the Broadcasting Council of the Republic of Macedonia, No. 2, 1998, No. 7, 2000.

MOLDOVA

Broadcasters are required to broadcast at least 65% of their production "in the state language" (Broadcasting Law). However, this restriction does not apply to programmes and shows rebroadcast from other countries in other languages, as well as to programmes broadcast in areas populated by ethnic minorities. This provision is formulated in a rather vague way, and it is usually not observed, as the radio market of Moldova is dominated by Moscow-based radio and TV stations broadcasting in Russian. Public broadcasters are required by the Broadcasting Law to produce originally at least 50% of their programming.

The Broadcasting Law bans programmes containing pornography and those that "propagate the culture of violence," but no definition of these terms is given. Bans on production and/or distribution of pornographic and violent materials also exist in the Code of Administrative Violations.

MONTENEGRO

There are no media restrictions of significant public importance.

Source:

Montenegro Media Institute

ROMANIA

There are no legal restrictions for media development.

A new law regulating pornographic media was recently adopted in order to protect children, but it is poorly implemented.

SERBIA

The Law on Public Information and the Broadcasting Act prohibit hate speech, publishing of pornographic material at a time and place likely to violate the rights of minors, as well as the airing of programmes abusing the trust of the public and inciting violence and crime. The two laws also protect personal privacy. In practice, pornographic magazines are openly displayed on newsstands, and TV stations – including even the national ones – air pornographic films early at night, around 11 pm, for example BK TV on weekends.

Source:

Media Center, Belgrade

SLOVENIA

There are no important general media restrictions regarding content – with the exception of pornography, which is prohibited by law (the line between erotic content, allowed by law, and pornographic content has only recently become a topic of public discussion, as it has not been defined before). There are also the usual and general prohibitions in the Media Law of incitement to racial, ethnic, religious, sexual and other forms of hatred and hate-speech.

9. Violation of Journalists' Rights

Violation of Journalists' Rights

“Journalists’ rights” is a term that is quite vague and subject to interpretation. Without going into the depths of the content and scope of the term, the following texts deal with cases of threats and violence against journalists related to their professional conduct. Lawsuits against journalists based on professional conduct are also of interest to us, because in many cases such lawsuits are a tool for exercising external pressure without necessarily being “violent.” In short, these texts outline the limits of journalists’ professional freedom.

ALBANIA

Although not commonplace, there have been reports about physical attacks and other acts of intimidation directed against journalists in Albania. Whereas members of the established media have seen their status and safety improve steadily over the last ten years, reporters based in the provinces outside the capital remain vulnerable to abuse at the hands of government officials.

The abuses, which range from intimidation to actual assaults, do not appear to be part of any organized and systematic campaign to suppress media freedoms. However, the failure of the authorities to investigate such assaults and to hold their perpetrators accountable breeds a culture of impunity that undermines a free and vibrant press.

Internal investigations by the Albanian police (the main perpetrator of such abuses) into alleged violations of press freedom by police officials are often inadequate and unable to lead to individual liability. The public prosecutorial system has been equally reluctant to initiate criminal investigations in this respect.

The work of the courts, especially in the area of defamation, has also been deficient. Such deficiency is a result of shortcomings in both the relevant legal framework and its application by the Albanian courts.

The six defamation cases covered by Human Rights Watch (*P. Koçi vs. A. Patozi*, *N. Legisi vs. A. Hoxha*, *M. Kryemadhi vs. A. Patozi*, *M. Kryemadhi vs. Redin Hafizi*, *M. Kryemadhi vs. Sh. Peposhi*, *S. Gjinushi vs. P. Gjata*) show that the Albanian courts’ application of the law is erroneous in the following aspects:

Derogation from the principle of presumed innocence. In five out of the six aforementioned trials the courts placed the burden of proof on the journalist defendants. The cases suggest that unless a defendant can prove that the allegedly defamatory statement is true, Albanian judges tend to conclude not only that the statement is false but that it was also made in bad faith. This includes those cases where the statement at issue was an opinion or value judgment, which, almost by definition, are not susceptible to the requirement of proof. In sum, Albanian courts have generally reversed the presumption of innocence to a presumption of guilt.

Similarly, courts frequently make the erroneous assumption that journalists who refuse to disclose their sources have acted in bad faith and are therefore guilty of malicious defamation. The courts fail to acknowledge the journalist’s right to protection of confidential sources.

All six judgments also suffer from poor reasoning and insufficient evidence to justify the sanctions imposed. Some cases, in which the judges failed to consider relevant evidence beneficial to the defendant, suggest judicial bias against the defendant (see the *Hoxha* and *Hafizi* cases). In other cases, the analysis reveals serious violations of the defendant’s due process rights, such as the right to be heard or the right to counsel (see the *Hoxha* and *Kryemadhi* cases).

The greatest shortcoming, however, of the Albanian courts’ approach to these cases is probably their failure to acknowledge the human rights implications that are bound to arise from the application of defamation laws. In none of the six cases did any of the courts, at any level of the judicial pyramid, seek to balance a public person’s right to reputation with freedom of the press and the general democratic interest in promoting public debate.

Sources:

“The Cost of Speech” – Violations of Media Freedom in Albania – Human Rights Watch, June 2002
Freedom of Speech: The Law and Case Law, Institute for Public & Legal Studies, May 2003

BOSNIA AND HERZEGOVINA

Financial pressures on journalists are beginning to replace the fear of political threats. Though notable examples of physical attacks have occurred in the past, current crimes against journalists more often take subtler forms. High public officials and state-owned companies rank among the offenders, and the State often fails to prosecute crimes against journalists or media outlets. Roughly 40 defamation cases remain open. By a decision of the High Representative, libel has become part of the civil code. The law proposes a higher level of tolerance on the part of public persons, rather than stricter standards for their behaviour.

Sources:
Media Sustainability Index 2002 (MSI) Irex ProMedia

BULGARIA

Threats against journalists are rarely reported in public. This also applies to violations of journalist rights – by rule; these are either covered up or provoke public scandal. For instance, in January 2002 the BNT News Department protested against the “constant interference and pressure” from the BNT management in the preparation of daily newscasts. (On one such occasion the BNT Director General insisted that the prime-time newscast air the entire 13-minute speech of the Prime Minister instead of the 10-minute excerpt it had prepared.)

In 2003 A. Loukov, Editor-in-Chief of two Varna-based media, was brutally assaulted and beaten up on the day he published a commentary (in the newspaper *Chernomorets* and the online *Dnes Plus*) suggesting that the local mayor had connections with shady businessmen.

The issue of “insignificant violation” of journalist rights is becoming increasingly important. For example, a survey on the freedom of BNR and BNT journalists in 2002 as against 1996 shows that journalists think that their freedom is restricted, that there has been an evolution in the forms of pressure on them, interference by the management under external pressure, and self-censorship.

Sources:
ACCESS-Sofia Foundation media monitoring.
Journalists from BNR and BNT on Their Freedom: Six Years Later. Survey conducted by the Bulgarian Helsinki Committee.

CROATIA

In the past few years there have been fewer cases of threats and violence than in the last decade. Violence against journalists occurs mainly on the regional (provincial) level, in conflicts with local business companies and their owners. In 2002 there were several threats against sports journalists from a sports daily (*Sportske Novosti*). In 2002 again, journalists who covered a big trial against one “criminal organization” reported serious threats. The Editor-in-Chief of the *Nacional* weekly was forced to hire bodyguards after receiving numerous threats.

On 1 March 2003 a bomb blew up the car of Ninoslav Pavic, owner of the biggest publishing company in Croatia – Europa Press Holding. Nobody was injured. The perpetrators remain unknown.

Sources:
CJA website: www.hnd.hr

HUNGARY

Journalists in Hungary are not killed, beaten up or violently threatened as a matter of routine. They may be most immediately threatened if they work for the public service media, but this threat is largely economic in nature, i.e. they may lose their job for political reasons.

MACEDONIA

With regard to violence against journalists, there have been many cases of threats, most often anonymous (over the phone), against journalists or their companies. Journalists do not wish to speak about this and so there are no official data on this.

In addition, there have been many examples of verbal violence or assault on journalists or journalist crews (cameraman), as well as taking away their equipment (cameras, recorded material). The media regularly inform the public about this; however, there are no statistics on such incidents. The reasons for such assaults most often are associated with a desire to hide the truth about some event (for example, the case of the Smeltery in Veles when journalists revealed alarming information on pollution of Veles and the consequences for the health of infants) or to intimidate the media in order to change the course of their editorial policy (for example, the case of the local TV Era from Skopje. During the last presidential elections this station got anonymous threats not to broadcast an interview with presidential candidate Tito Petkovski and any information about the opposition parties. After this, power to their transmitter was cut off).

There is a well-known case of a wiretapping scandal in 2000, which involved also about 30 journalists exclusively from the private media (dailies like *Dnevnik*, *Vest*, *Makedonija Denes* and *Utrinski Vesnik*, weeklies like *Zum*, *Fokus* and *Start*, and TV stations like A1, Sitel, Kanal 5 and Sky Net), most of which maintain an editorial policy contrary to that of the national government. Taking into account the very names, one can say that the case involved the “journalistic elite” which has huge influence on public opinion formation in Macedonia. Court satisfaction has yet to be awarded.

Very drastic was the case of a radio journalist from Kumanovo, who was assaulted and battered on the premises of his radio station. He got severe injuries. This case is one of the very few where the attacker was given a prison sentence. In all other cases, the “story” ends when the seized equipment is given back, but not always with the recorded material.

Notes:

There are no exact data on the actual number of court cases against journalists because this is a recent practice in Macedonia established only in the last five or six years.

Sources:

Project: “Media Monitoring in Macedonia,” Institute for Sociological and Political-Juridical Research, Skopje
Reports from journalists in the press, radio and TV
Vesna Sopar: “Macedonian Watergate – or ‘Big Ear’ Affair”
(<http://www.mediaonline.ba/mediaupit/clanak.html>)

MOLDOVA

Violations against journalists’ rights are routine in Moldova. They are perpetrated both by governmental authorities as well as by political parties that become subjects of journalistic interest. Thus, in early August 2002 the Minister of Education Ghoerghe Sima grabbed the tape recorder from a *Flux* daily journalist, who was interviewing a group of people on scholarship opportunities in Romania, and gave the tape to one of his bodyguards. Another case took place in late August, when two bodyguards of Iurie Rosca, head of the Popular Christian Democratic Party, forced a *Sens* weekly employee, who was distributing copies of the newspaper in the street, to throw the copies into a trash container and set them on fire. They also threatened the distributor that he would be beaten up next time he was caught selling *Sens*.

A more scandalous affair took place in early October 2002, when two senior editors of the semi-tabloid weekly *Accente*, notorious for its scandalous investigations against public figures, were arrested on charges of taking a bribe of USD 1,500 from a business person. The police impounded the newspaper’s computers and databases, allegedly in violation of the legal procedure for such cases, returning them two weeks later.

Lawsuits against journalists are routine. Journalists are placed at a disadvantage by the defamation legislation, because the burden of proof lies on the defendant (i.e. the journalist or the newspaper).

Sources:

Article XIX, The Global Campaign for Free Expression, London, UK.

MONTENEGRO

There are no major cases of threats and violence against journalists.

Sources:

Montenegro Media Institute

ROMANIA

Fifty-eight severe cases of press freedom violations¹ took place in 2002. Those cases included verbal threats and physical assaults, conflicts with criminals, disputes between media owners and editors, and political pressure. The Southeast European Media Organization report ranked Romania second in the region, after Serbia, by abuse of journalists' rights.

In 2002 over 400 journalists were sued under the Penal Code, most of them on the basis of two articles (205 and 206) criminalizing insult and defamation. Under these articles, all types of defamation are considered criminal offences. In some cases local publications were specifically targeted by the authorities: for example, *Ziarul de Vrancea*, against which there were 134 cases.

However, there are clever ways of exerting political pressure; the government party is following the principle: *If you cannot control them, buy them*. The best example is the case of the *Monitorul* network, which had separate editions in the most important cities. After a series of financial transactions, many of the publications from this network were taken over by business people who were open supporters of the government party. This party controls the majority of local media. In some cases, ex-*Monitorul* journalists founded new local publications, few of them having chances to survive. *Ziarul de Vrancea* is one of those newly created critical publications.

Notes:

¹ According to the Southeast European Media Organization (SEEMO)

Sources:

Southeast European Media Organization (SEEMO)

On lawsuits, see Media Monitoring Agency (www.mma.ro), "A Report on the Freedom of Speech in Romania."

On economic pressure, see *Policy Warning Report*, No. 1/2003, edited by the Romanian Academic Society (www.sar.org.ro)

SERBIA

Journalists and editors, especially those of the local media formally owned by municipal authorities, are still dismissed on the orders of political parties. This has been the case of, for example, the editor of the local TV Smederevo who, in October 2002 on the eve of election silence, brought to his studio a leader of the opposition radical party instead of playing the tape prepared by the ruling Democratic Party of Serbia (DSS). Personnel policy in all local state- or municipality-owned media is controlled by political parties. A special problem in this respect is the absence of orderly documentation on politically motivated dismissals, threats and attacks on journalists. Physical assaults on editors and journalists, insults and threats of beating, death or discharge are a frequent occurrence eliciting a reaction only from journalist associations. The following are but a few of the best known examples: threats of Velimir Iliæ, one of the DOS leaders, addressed at journalist Olja Beckoviæ from one of the best known Belgrade stations, TV Studio B, in July 2002; the conflict and insult of journalists from the local TV Pirot, in August 2002; insults and threats to journalists from the local TV Èàèak, in October 2002; threats voiced by Nenad Èanak, speaker of the Parliament of Vojvodina, aimed at reporters from the local Novi Sad Radio 021, insults and bodily assault of Partizan football team coach on RTS reporter Nedeljko Kovinjalò, in November 2002...

Sources:

Media Center, Belgrade

Independent Journalists' Association of Serbia

SLOVENIA

In the beginning of the 1990s, there were a number of libel cases against journalists, but since the courts have very rarely found journalists guilty of intentionally producing harm and causing damage the number of such cases has declined. In 2001, journalist Miro Petek of the daily *Veèer* was badly beaten in front of his family house in Koroška region in the north of Slovenia. He suffered a number of injuries, some of which have caused permanent harm to his health, and although police declared that they are on the trail of those who attacked him and ordered the attack, the case has not been solved to date. A parliamentary commission consisting of opposition and coalition members was established, and has made important progress. A final report is due to be published.

10. Sanctions for Libel

Sanctions for Libel

Libel is a very special issue in the media realm because it has a direct bearing on the fundamental role of the media as a tool of communication. The issue of libel is particularly important in societies in transition where the media are expected to play additional roles: to support development, to educate, to serve as a watchdog, to promote concepts, to balance between different views and stands in society, etc. Hence a special place is offered for explanations on the sanctions for libel, focusing on the legal framework and its implementation. Specific cases of journalists who have been sanctioned for libel are also given as examples.

ALBANIA

The Republic of Albania has both criminal and civil legislation on defamation.

Criminal Defamation Law

The Albanian Criminal Code (ACC) includes at least five provisions on defamation. These are simple insult, simple libel, insult of public officials related to their public function, libel of public officials related to their public function, and libel of the President of the Republic.

Article 119 of the ACC criminalizes insult and makes a distinction between sanctions in cases of public insult. Insult has been interpreted by the courts as including “humiliating, immoral or ridiculing words, images or gestures,” which can consist of things such as caricatures or sketches. Defendants have been found guilty of public insult for insolent words uttered in the presence of as few as seven or eight persons. An insult disseminated through mass media is always considered to be a public insult.

Article 120 of the ACC defines libel narrowly and once again applies a distinction in sentences in cases of public libel. The article sets a rather high threshold of evidence. A defendant can be found guilty if it is proven that the defendant (a) disseminated utterances detrimental to another person’s public esteem, (b) which are false and (c) sufficiently concrete, and (d) that he or she did so in full awareness of their falsehood. In other words, truth of defamatory statements and the lack of a malicious, defamatory intent on the part of the defendant are complete defences in an Article 120 action.

Insult and libel against public officials are defined under Chapter VIII of the ACC on Crimes against the Authority of the State. The key elements of these offences are essentially the same as in general insult and general libel. They differ in that they provide special protection to persons “who perform a state function or a public service” and become victims of defamation for reasons “related to their state activity or public service.” Therefore, they apply only to cases in which the defamatory allegations against the public official are connected to his or her official activities.

The protected category is usually construed very loosely by the Albanian courts and has included also public schoolteachers or medical personnel in the public health system. Likewise, in practice the link between the nature of the defamatory statement and the victim’s official activity can be blurred or remote.

Punishments for libel against public officials are the same as those applicable to general libel, including the higher punishment for public libel. The sanctions applicable to insult of public officials, however, are 100 percent higher than those applicable to simple insult.

There are procedural differences between general and official defamation. Public officials who bring defamation complaints enjoy significant procedural privileges. They need only to file a complaint with the police or a public prosecutor, who then takes over the case. Once this complaint is filed, the prosecutor becomes responsible for its investigation and for pursuing the case in court in the same way that typical prosecutions are handled. A private citizen, on the other hand, has to file the complaint directly with the court and has the burden to “prove the charges” in the course of the trial – as a so-called “damaged-accuser.” There is no pre-trial investigation; the prosecutor may simply “participate in the adjudication of such cases” and is free to recommend that the defendant be either acquitted or found guilty.

Civil Defamation Law

Under the Albanian Civil Code, a person who has suffered “harm to the honour of his personality” has a right to compensation. Since the Civil Code does not clarify the standard of liability for civil defamation, general standards of tort liability apply: the defendant is liable if he or she has caused an “illegal damage” and has acted with fault. The damage is illegal “if it results from the infringement or violation of another person’s rights or interests that are protected by the juridical order or good custom.” Fault may result from either deliberate wrongful acts or negligence.

It is not clear whether the truthfulness of a defamatory statement or good faith can be a defence in a defamation case. In practice, Albanian courts do appear to assume that proving the truth of a defamatory statement exempts the defendant from liability. A greater source of legal uncertainty is the failure of Albanian law to provide any guidance on the quantification of moral damages. Nor does Albanian case law on civil defamation shed too much light on these issues. The judgments in general include very little or no discussion of liability standards or the methodology used for setting the level of damage awards.

According to the European standards, any restrictions on freedom of expression shall “be prescribed by law” and shall be “formulated with sufficient precision to enable the citizen to regulate his conduct.” The vague definition of harm to one’s reputation and the significant uncertainty surrounding the standards and level of liability in Albanian civil defamation law raise serious concerns whether the Civil Code provisions meet the foreseeability test. The inability of the media to reasonably predict the boundaries of “permissible defamation” leads them to err on the safe side; it also gives Albanian judges wide discretion to apply civil defamation laws in ways that can be easily abused to sanction protected speech.

Civil defamation law in Albania is characterized by yet another problem. According to Article 113 of the Civil Code, bringing an action on grounds of alleged defamation is not subject to any limitation period. This might weaken the journalists’ capacity for proper defence and it brings about a state of general uncertainty.

In addition, Article 625(b) of the Civil Code enables individuals to sue for damages on behalf of deceased people. This provision is believed to have the potential to prevent journalists from making critical historical analysis.

Civil redress is becoming increasingly widespread. The injured parties have come to appreciate the comfort financial compensation may bring. On the other side, public opinion is divided over the rightfulness and the considerable incidence of compensations awarded in cases of defamation.

Sources:

“The Cost of Speech” – Violations of Media Freedom in Albania – Human Rights Watch, June 2002
Freedom of Speech: The Law and Case Law, Institute for Public & Legal Studies, May 2003

BOSNIA AND HERZEGOVINA

No journalists in the Federation of Bosnia and Herzegovina were sentenced in 2002 on charges of defamation (the office of the Federation Media Ombudsman did not have data for Republika Srpska, although it seems there were two or three such cases).

Until autumn 2002, the Criminal Law was in force in the Federation of Bosnia and Herzegovina, which allowed the possibility of defamation procedures, which were in most part processed by this Law, however, without the option of imprisonment but only of monetary fines. The new Law on the Protection Against Defamation has been effective since summer 2001 in RS, and since 1 November 2002 in the Federation of Bosnia and Herzegovina.

Sources:

Federation Media Ombudsman

BULGARIA

In 2000 Bulgaria’s Penal Code was amended in regard to liability for insult and libel: the lawmakers revoked imprisonment as a punishment for insult and libel and introduced (heavy) fines. Despite the heated public debate before and after the passage of these amendments, the provisions allowing for heavier fines for journalists for insult or libel in cases involving government officials have remained in place.

NGO surveys show that in February and March 2003 the number of libel cases instituted against journalists and publishers has increased since 2001 (respectively 131 and 115 cases; the data on 2001 are from a similar survey), as

well as that the number of criminal cases exceeds that of civil cases. The majority of criminal libel suits against journalists were filed by government officials (over investigative reports on misgovernment or corruption).

As regards the duration of legal proceedings: 37 of the cases open in February 2001 survey are still pending. Proceedings usually take two or three years. A comparison with the 2001 survey does not show a decrease in the duration of proceedings.

The data indicate that a minimal number of cases end in conviction of journalists, as well as that the penalty fines are most often replaced by administrative fines. By rule, the courts award reasonable damages. Nevertheless, the exceptions give cause for concern.

In May 2002 journalist Katya Kassabova was sentenced to pay BGN 7,000 (appr. USD 3,500) in a libel suit filed over an article for the *Kompas* newspaper (in which she voiced suspicions of corruption in the admission of students to elite schools in Bourgas). This fine is enormous by Bulgarian standards and was seen as an attempt to intimidate investigative journalists through the threat of heavy fines. (Several Bulgarian NGOs and Article XIX came out in Kassabova's support.)

Another significant case – *Eva Sokolova v. 168 Chassa EOOD* – was finally decided by the Supreme Court of Cassation in 2002. (Sokolova, wife of former National Assembly chairman Yordan Sokolov, filed a non-material damages suit for libel against 168 Chassa EOOD, which publishes the *24 Chassa* daily. Despite the court ruling against an independent daily, many Bulgarian experts view the case as a violation of the constitutional right of citizens to be informed. (*24 Chassa* was actually found guilty of citing a quotation even though the media can hardly be held responsible for quoting public statements. The case prompted a protest statement by the Union of Publishers of Dailies in Bulgaria in June 2002, uniting diametrically opposed publications).

Notes:

Important conclusions on the issue of sanctions for libel and their repercussions on media conduct, as well as a number of cases, can be found in the Bulgarian Helsinki Committee reports. (See, for example, "Are Bulgarian Journalists Protected Against Charges of Insult and Libel: A BHC Survey" at <http://www.bghelsinki.org/fe/analysss.html>).

Sources:

Bulgarian Helsinki Committee
Article XIX, Global Campaign for Free Expression

CROATIA

Lawsuits against journalists dominated in the period from 1991 to 2001. Alan Uzelac, PhD, wrote a report in which he found that between 1991 and 2001 there were 540 cases against journalists and publishers (497 civil suits, and 43 criminal procedures). The plaintiffs sued for damages in 482 cases. It must be said that the legal basis for all these lawsuits is "physical and mental pain."

The largest number of libel suits were filed against the weeklies *Globus* and *Nacional*, as well as the *Novi List* daily. Ninety-three lawsuits were settled by the end of 2000.

Source:

CJA website: www.hnd.hr

HUNGARY

The official translation of the Hungarian Criminal Code uses the terminology "defamation", instead of libel. Section 179 of the Criminal Code provides that:

"(1) The person who states or rumors a fact suitable for impairing honor, or uses an expression directly referring to such a fact, about somebody, before somebody else, commits a misdemeanor, and shall be punishable with imprisonment of up to one year, labor in the public interest, or fine.

(2) The punishment shall be imprisonment of up to two years, if the defamation is committed

a) for a base reason or purpose,

b) before big publicity,

causing considerable injury of interest."

According to Section 180 of the Hungarian Criminal Code, slander occurs when:

“(1) The person who, apart from the case of Section 179, uses an expression suitable for impairing honor or commits another act of such a type,
a) in connection with the job, performance of public mandate or in connection with the activity of public concern of the injured party,
b) before a great publicity
shall be punishable for a misdemeanor with imprisonment of up to one year, labor in the public interest, or fine. The person who commits slander with assault, shall be punishable in accordance with subsection (1)”.

Furthermore, Section 182 of the Criminal Code provides that:

“(1) The perpetrator may not be punished for the crimes defined in Sections 179 to 181, if the fact suitable for impairing the honor turns out to be true.
(2) Evidencing of reality may take place, if the statement, rumoring of the fact or the use of an expression immediately referring thereto was justified by public interest or by the lawful interest of anybody.”

There are few libel cases initiated and pending at courts of various instances. In the past ten years or so, no one in Hungary has been sentenced to prison for defamation and slander.

In Hungary, value judgments/opinions of any forms belong to the category of protected speech, with very few exceptions specified in the Criminal Code (see also the section on hate speech issues.).

On the other hand, those who believe that their personal dignity has been violated prefer suing at civil courts, where they may also seek financial compensation for the violation of their personal dignity. The majority of the petitioners of “personal dignity cases” are public figures: politicians, artists, etc.

In accordance with the case law of the International Human Rights Court sitting in Strasbourg and the relevant resolutions of the Hungarian Constitutional Court, courts take into consideration that public figures should tolerate higher degree of criticism than “private citizens.”

Source:
The Penal Code

MACEDONIA

Chapter 18 of the Criminal Code of the Republic of Macedonia, enacted in 1996, regulates the criminal offences against honour and reputation: libel (Art. 172), insult (Art. 173), disclosure of personal and family circumstances (Art. 174), and discrediting by imputing a criminal act (Art. 175).

With regard to all previously said criminal offences and the fines foreseen for them, it should be underlined that pursuant to Article 38 regulating the amount of this fine, the fine may not be less than 5,000 denars, or may not exceed 250,000 denars.

However, in 1999 the Macedonian Parliament amended the Criminal Code, thus increasing the fines provided by the said articles.

Therefore, *the lowest fine for libel* is now 10,000 denars, but for *libel committed through mass media* the lowest fine is 40,000 denars. The criminal offence of *insult*, after the changes, is to be punished with at least 10,000 denars, but if committed through the mass media then the lowest fine is 20,000 denars. The same fines are prescribed for discrediting by imputing a criminal act. The lowest fine for the crime of *disclosure of personal and family circumstances* is 10,000 denars. However, if this crime is committed through the mass media, then the fine is four times higher, 40,000 denars.

Changes were made also in Article 176 that regulates non-punishment for the crimes of *libel, insult, and disclosure of personal and family circumstances*. Paragraph 3 of this Article formerly read as follows: “For disclosure or dissemination of personal and family circumstances that is committed in the exercise of official duty, political or other community activity, in defence of certain right or in protection of justifiable interests, the perpetrator shall not be punished if he proves the truthfulness of his claim or if he proves that he had reasonable grounds, to believe in the truthfulness of what he had disclosed or disseminated.”

It has been revised as follows: “For disclosure or dissemination of personal or family circumstances that is committed in exercise of things of public interest, or in defense of some right, the perpetrator shall not be punished, if he proves the truthfulness of his claim.”

Notes:

In recent years it has, so to speak, become “fashionable” to bring criminal charges for libel and proclaimed lies against journalists and their media. However, there are no official statistics on their number; nor is there information how many of these cases have ended with a court sentence.

Sources:

Criminal Code of the Republic of Macedonia, No. 37, 1996

MOLDOVA

The new Civil and Criminal Codes, adopted in 2002 but in force since June 2003, have become more threatening to the profession of journalism than the old Codes. Thus, the new Civil Code no longer contains a compensation ceiling for libel (the old Code had a ceiling of the equivalent US\$ 260), and plaintiffs can claim now virtually any amount for damages. The new Criminal Code has raised the term of maximal imprisonment for libel from two to five years and has abolished fines as an alternative to imprisonment, thus introducing harsher sanctions for criminal libel.

Libel cases are very frequent in Moldova. According to Article XIX, in libel cases plaintiffs and even some judges do not see the difference between legitimate criticism and defamation.

Sources:

Article XIX, The Global Campaign for Free Expression, London, UK.

MONTENEGRO

There are some legal cases which are still pending. There are no data on their exact number.

Source:

Montenegro Media Institute

ROMANIA

At the beginning of 2003, the Penal Code was amended. In 2002 the old provisions of the Code were still in force. Article 205 provided that insulting a person deliberately constituted a crime and was subject to a fine or up to two years imprisonment. Article 206 defined calumny as “public statement or accusation regarding a certain fact” which “if true, would expose that person to criminal, administrative or disciplinary punishment or to public contempt.” The proof of truth was admissible only if the statement or accusation had been made in order to defend a legitimate interest. As noted above (VI.9.), in 2002 over 400 journalists were sued under articles 205 and 206.

Although it took some steps forward, the new Penal Code repeated those mistakes. Jail sentences changed into so-called fine-days, a legal artifice that changed jail into money, in huge amounts compared with journalists’ salaries. These fines can be imposed even if the journalist proves not guilty or shows good faith, in case a person feels offended or defamed.

Sources:

Media Monitoring Agency (www.mma.ro), “A Report on the Freedom of Speech in Romania”

Media Sustainability Index 2002, International Research & Exchanges Board

SERBIA

In 2002 a total of 300 criminal actions for libel were instituted in Serbia. The bulk of charges against journalists were filed by officials of the former Milošević regime. We must also bear in mind the cases where lawsuits were announced although not instituted, serving as a kind of political pressure or attempt to intimidate, most often resorted to by the ruling parties' officials, ministers and directors. Media associations have demanded decriminalization of libel, but the authorities have so far failed to make good on their promise to do that.

Sources:

Media Center, Belgrade
Independent Journalists' Association of Serbia
Journalists' Association of Serbia

SLOVENIA

No journalists were sentenced for libel in 2003 or 2002, at least not in any major case with major repercussions. A number of cases are still pending, as Slovenian courts are often very slow.

11. Hate Speech

Hate Speech

Including hate speech in an evaluative format requires basic agreement on the meaning of this term. The working definition used here is based on the general understanding of hate speech as any speech that advocates harm or violence against a person or a group, or uses epithets and derogatory terms against an individual or a group. However, comparing levels of hate speech remains a difficult task even when clear parameters are available. Such a comparison is not the issue here – here we are interested in the place of hate speech in the mainstream media and the importance of the issue from the point of view of society and the media. Although the results cannot be comparable country by country, certain explanations on the issue might be of interest to the reader, bearing in mind the region's poor track record in interethnic relations.

ALBANIA

The issue of hate speech (at least in its more radical form as an incitement to violence against other groups) is tackled by Albanian legislation through the law on broadcast media and the Criminal Code. Whereas violation of the respective broadcast law provision may lead to the withdrawal of the licence, the Criminal Code envisages penalties that range from a simple fine to ten years of imprisonment. Articles 265 and 266 of the Albanian Criminal Code are pertinent to the issue of hate speech. Article 265 stipulates that inciting national, racial or religious hatred or conflict as well as preparing, propagating, or keeping with the intent of propagating, of writings with that content, is punishable by a fine or up to ten years of imprisonment. On the other hand, Article 266 criminalizes the endangering of public peace by calling for national hatred against other parts of the population, by insulting or defaming them, or by requesting the use of force or arbitrary actions against them. The sanctions for violation of Article 266 range between a fine and up to five years of imprisonment.

However, so far the Albanian courts have failed to produce sufficient and consistent case law which would make it clear that in order for the court to award a criminal sanction on the ground of “hate speech,” violence against the group targeted by this speech has to be a very likely or an eminent result of the speech in question. Until such jurisprudential development takes place (determining with a degree of predictability such notions as the threshold of proof, the causal link between speech and deeds, etc.), the hate speech provisions of the Criminal Code pose a potential risk to freedom of speech in Albania.

On the other hand, lesser forms of hate speech, such as derogatory depictions of various groups, racist or xenophobic speech (although not widespread, this kind of speech commonly concerns the Roma), tend to be dealt with on ethical and/or political grounds.

Sources:

“Towards Media Freedom” – An Analysis of Albanian Media Legislation
Freedom of Speech: The Law and Case Law, Institute for Public & Legal Studies, May 2003

BOSNIA AND HERZEGOVINA

Hate speech is widespread in some print media, and has assumed new characteristics of politically motivated hate.

The earlier practice of religiously or nationally motivated hate has decreased, although it can be found here and there (usually in local electronic media), but on a significantly lesser scale than in the years of war and immediately after the war.

Even though it cannot be labeled as hate, most media occasionally exercise a belittling of certain minority groups (Roma people, Kurds, Chinese...). The CRA applies sanctions against electronic media.¹

The CRA Broadcasting Code of Practice, Article 1 “General”, which, *inter alia*, treats the issues of hate speech, states:

“Programmes shall meet generally accepted community standards of civility and respect for the ethnic, cultural

and religious diversity of Bosnia and Herzegovina.

Broadcasters shall not broadcast any material which by its content or tone:

(1) carries a clear and immediate risk of inciting ethnic or religious hatred among the communities of Bosnia and Herzegovina, or which by any reasonable judgement would incite to violence, disorder or rioting, or which could encourage crime or criminal activities.

(2) carries a clear and immediate risk of causing public harm: such harm being defined as death, injury, damage to property or other violence, or the diversion of police, medical services or other forces of public order from their normal duties.”

As the case-law of the CRA shows, there was a great number of cases of hate speech in electronic media at the time of inception of the former IMC, later transformed into the CRA (for reference, see CRA Report: “Case Analysis 1998 – 2001,” available at www.cra.ba). However, the CRA notes that recently the trend of hate speech use in electronic media has decreased tremendously (for reference, see CRA Report: “Case Analysis 2002,” available at www.cra.ba).²

Source:

¹ Federation Media Ombudsman

² Communications Regulatory Agency – CRA

BULGARIA

Hate speech was and still is to be found mainly in the print media, and appears only occasionally on radio and TV. Hate speech was long considered part of the new “free” media language used by the free press after the fall of communism. In 2003 *24 Chassa*, Bulgaria’s second largest-circulation daily, has continued publishing a section (“24 Hasha”) that uses extremely offensive language against virtually everybody (incumbents, public figures, minorities). The issue of hate speech against the Roma is raised constantly by human rights activists. Human rights activists claim that the Roma are usually victimized in texts and images, and often criticize crime-related image-building of the Roma in particular. As a result of a large-scale human rights campaign and following a debate that last several years, the media have finally started referring to the group as “Roma,” which is considered neutral, instead of “Tzigani” (“Gypsies,” widely regarded as derogatory). Occasionally some media are accused of anti-Semitism (e.g. the *Monitor* daily). This issue is discussed in a series of publications, e.g. *Balkan Neighbours* newsletter, 1994-2001, Human Rights Project publications, and others.

Use of hate speech has gradually declined since 1990, but the issue sometimes surfaces unexpectedly. For instance, the *Mediapool.bg* webzine posted a warning (in 2003) that “the [discussion] forum administrators will remove all opinions containing offensive qualifications and insults on a racial, ethnic or religious basis” after a spate of offensive postings.

Sanctions: The legal standards of combating racial and ethnic discrimination in Bulgaria are set mainly by the Constitution and the Penal Code, and are seldom if ever applied in practice. The Penal Code provides for imprisonment up to three years and public reprobation for those who preach or incite to racial or national hostility or hatred, or racial discrimination. Enforcement of this legal standard in the case of the media, however, is practically obstructed by the difficulty of providing adequate proof. Thus, despite the numerous cases cited in the publications noted above, no media or journalist has been convicted under this provision to date.

CROATIA

Hate speech, which was very visible in Croatian media during the years of war (1991-1997), has almost disappeared. At the moment, one might say that the mainstream media are much more careful about using politically correct language than in the 1990s.

Very rarely in local media one can recognize a language of intolerance towards some social minorities, such as homosexuals or members of certain religious groups, and about Roma people as an ethnic minority. For example, last year in Međimurje (Southern Croatia) a sort of isolation/division occurred between Croatian teachers and Roma pupils. Local media from Međimurje reported on that problem using politically incorrect language, but this was not real hate speech.

HUNGARY

Section 269 of the Hungarian Criminal Code (“Code”) penalizes incitement against a community. Accordingly:
“The person who incites to hatred or commits another act suitable for the incitement of hatred before the general public against

- a) the Hungarian nation,
 - b) any national, ethnic, racial group or certain groups of the population,
- shall be punishable for a felony with imprisonment up to three years.”

Section 269/A of the Criminal Code sanctions the violation of national symbols. The Code provides that:
“The person who – before great publicity – uses an expression outraging or humiliating the national anthem, the flag or the coat of arms of the Republic of Hungary, or commits any other similar act, unless a graver crime is realized, shall be punishable for a misdemeanor with imprisonment of up to one year, labor in the public interest, or fine.”

Pursuant to 269/B of the Code, the use of symbols of despotism also constitute a crime:

- “(1) The person who
- a) distributes;
 - b) uses before great publicity;
 - c) exhibits in public;
- a swastika, the SS sign, an arrow-cross, sickle and hammer, a five-pointed red star or a symbol depicting the above, – unless a graver crime is realized – commits a misdemeanor, and shall be punishable with fine.
- (2) The person, who commits the act defined in subsection (1) for the purposes of the dissemination of knowledge, education, science, or art, or with the purpose of information about the events of history or the present time, shall not be punishable.
- (3) The provisions of subsections (1) and (2) do not extend to the official symbols of states in force.
- (4) In case of the use of symbols of despotism, the thing in respect of which the crime has been committed, shall be confiscated.

Hate speech is a delicate issue, and the term may be defined in different ways depending on the cultural, political, historical circumstances. Therefore all brief, general evaluations of the Hungarian situation concerning hate speech must be treated cautiously. Nonetheless, it can be said that the most frequent complaints regarding hate speech in the Hungarian media are connected to the Jewish and Roma minorities. There are extreme-right fringe publications that focus on these groups and continue to discuss them in derogatory terms.

However, it is not so much these publications that have caused concern in the past few years. Certain occurrences in more mainstream media outlets or specific programmes in public service radio (*Vasárnapi Újság*) caused outrage in minority groups targeted by derogatory remarks. The complaints commission of the National Radio and Television Commission took action against both *Vasárnapi Újság* and the local Pannon Radio. Incidents of anti-Semitic discourse in the media were collected into a book in 2001 and 2002. There was public outrage when a national commercial television (TV2) broadcast an offensive parody of Roma, or when the same station ran a show in which a supposedly Japanese reporter interviewed Hungarian actors and pop stars.

Currently the minister of justice is working on a proposal for legal sanctions against hate speech.

Source:
The Penal Code

MACEDONIA

Until the 2001 conflict in Macedonia, there was no hate speech in the media or it was of marginal dimensions. However, during and after the 2001 conflict the media were caught in this trap, using pejorative words and metaphors underlining stereotypes especially against the other ethnic community. This was especially underlined between ethnic Macedonians and ethnic Albanians. Media (especially private newspapers and TV stations) used and suggested negative value qualifications (insults, labels) most often without any argument; emotionally overburdened words full of prejudice aimed at other ethnic groups (using ethnic slander like “Shiptar” for ethnic Albanians, or “Slavo-macedonians” for ethnic Macedonians); media imposed a unilateral interpretation of the status of refugees,

victims, and their families (this still goes on even today), thus creating public intolerance towards (even mobilization against) the Other. Some media (primarily the state media like Macedonian TV) promoted publicly the conspiracy theory, thus fulfilling the aims of the commissioning party (the government) in order to make up for the interpretation of events, and also to create an illusion of the importance of the commissioning party which has to fight against being dependent on the others (all critics of the current government). The media did this by always giving lengthy presentations (especially MTV) of, for example, all interviews and all statements by the prime minister, full of accusations, attacks against the opposition, the international community, the journalists, and even repeating this several times a day, so that everyone could not help but listen to the prime minister. While state-run media took part in production and promotion of such a climate (defining and locating the enemy), the private media did report and balance the words, the public performances, the steps undertaken by the leaders of the country. This hate speech did not entrap only those journalists (especially in weekly magazines like *Fokus*) who have this as their regular style of journalistic expression.

Concrete examples of sanctions against the media which used hate speech cannot be found. On the other hand, the journalists themselves have denounced all those who were entrapped by racism and xenophobia during the 2001 crisis. On its part, the state (or the government in power) punishes “in its own way” all those who use pejorative words, insults etc. for the state. The way used is to block the bank accounts (like the case of the weekly *Denes* during the 2000 elections), or to harass constantly by means of financial inspectors and auditors (the case of the weekly magazine *Start*), or even to make formal decisions (not enforced) to tear down their, supposedly, illegal company buildings (the case of private TVs A1 and Kanal 5).

Sources:

Vesna Sopar: “Reaction Due to Helsinki Committee’s Annual Report for Macedonian Media in 2001” (<http://www.mediaonline.ba/mediaupit/clanak.html>)

Vesna Sopar: “Press in Macedonia: Still in Process of Transition” (<http://www.soemz.euv-frankfurt-o.de/media-see/index.html>)

MOLDOVA

Hate speech has not been a major issue with the media in Moldova. There have not been any major scandals around instances of hate speech. Whatever disparaging references have been made, for example, to a particular ethnicity, they were made in a political rather than general ethnic context. For instance, the nationalist Popular Christian Democratic Party (PPCD) and its supporters have been called occasionally “fascists” by non-Romanian speakers, as this party is against the use of Russian as an official language and insists that Russians and other minorities must speak the official language (Romanian). In turn, the PPCD has been known to refer to Russians as “occupants” or “imperialists.”

One instance in which there was a case of hate speech in the media, but which can hardly be said to represent a trend, was when in 2001 a journalist from the Russian-language *Vremya* weekly was sued by members of a Romanian-speaking youth association, CAIRO, over an article that CAIRO alleged was denigrating to the Romanian speakers of Moldova by claiming that some public officials from the country’s titular nation took bribes and that the access of Russian speakers to positions of power was hindered. CAIRO eventually dropped its charges. Leaders of the Russian community voiced their concern in the context of this conflict that articles in the Romanian-language press that incited to inter-ethnic hatred were generally overlooked.¹

On the legislative level, hate speech and discrimination based on ethnic/racial/religious characteristics is prohibited by the Constitution, Criminal Code, Press Law, and Access to Information Law.

Sources:

¹ Natalia Angheli, “Moldova.” In: Ana Karlsreiter (ed.), *Media in Multilingual Societies: Freedom and Responsibility*, OSCE Representative on Freedom of the Media: Vienna, 2003, pp. 88-89.

MONTENEGRO

There are no explicit cases of hate speech.

Sources:

Fund for Humanitarian Law

ROMANIA

In 2000, a government ordinance banned racism, xenophobia and Holocaust denial. This new regulation is supposed to be implemented by the National Anti-Discrimination Council. However, the Council has remained relatively inactive, confronted with a traditionally nationalist and anti-Roma media. The anti-Roma discourse is frequently present in newspapers and in TV news. Those tendencies reflect a deeper social mentality. Thus, the social reaction against media racism is weak and limited only to NGOs specialized in human rights and minorities issues. Although it is expected to penalize all acts of discrimination, the Council has sanctioned only a limited number of breaches. Two journalists have been fined (one for opinions expressed in a properly marked editorial).

With regard to electronic media, the new Broadcast Law adopted in 2001 bans racism and xenophobia. Unfortunately, the first case when the law was applied was a controversial one. The National Council of Broadcasting (CNA) revoked the license of Oglinda TV because a guest on a live show had expressed anti-Semitic and extremist opinions.

SERBIA

Hate speech, one of the main characteristics of the media controlled by the previous regimes, almost disappeared after 2000. Naturally, there are individual “departures” from this new practice. A matter of concern in this respect is the non-enforcement of legal norms which sharply and quite clearly sanction insulting behaviour or behaviour inciting hatred or violence against national and religious minorities (Law on Public Information, Broadcasting Act, ethical codes) in such, albeit infrequent, cases. Hate speech apparently elicits reactions only of certain NGOs, and less frequently professional journalists associations. Hate speech is most often addressed at those with whom Serbia had armed conflicts, primarily Albanians and Croats, and is much more often found in statements of politicians than in journalist reports. Naturally, exceptions are found even among the media, and it is therefore deeply disturbing that a Belgrade daily paper systematically refers to the Albanians by a term which they consider derogatory and insulting. Media analysts warn of a specific problem revealed in the fact that, with but one exception, the media fail to address the hate speech which prevailed until the year 2000, considering this a sign that this kind of speech has only been suppressed but not essentially rejected as a model of behaviour.

Sources:
Media Center, Belgrade

SLOVENIA

No major cases of hate speech have been noticed in Slovenian media, at least not in an extreme form. There are cases of stereotypes and defamatory reporting on minorities such as Roma and homosexuals, but also on women and different religious groups. Most such cases are found in the daily tabloid *Slovenske novice* and some magazines such as *Mag* (a number of academic analyses of such coverage have been made on the Roma, refugees and, most recently, homosexuals).

12. Sources on the Media Scene

Sources on the Media Scene

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3. *Monitoring Albanian Media Landscape, January-December 2001*: English/Albanian, 2002, Agron Loci, Albanian Media Institute.
4. *Monitoring Albanian Media Landscape 2002*: English/Albanian, 2003, Ilda Londo, Albanian Media Institute.
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7. *Freedom of Expression: The Law and Case Law*: Albanian, 2003, Institute for Policy & Legal Studies, Onufri Publishing House.

Sources:

Albanian Media Institute, IREX, Institute for Public & Legal Studies

BOSNIA AND HERZEGOVINA

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3. *The Bosnia-Herzegovina Media Landscape*, European Journalism Centre, November 2002 (available at www.ejc.nl/jr/emland/bih.html)
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5. *Legislation in the Field of Broadcasting – Public Service and Commercial Broadcasters*, Group of Authors, Jana Urbas (ed.), Institute of Media Law, Bled, Slovenia, 2001 (available at http://www.mediaplan.ba/engleski/index_v.html in Media Reports Archive and/or Media Initiatives under Network's Projects)
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7. *Media at a Turning Point – A Media Picture of Bosnia and Herzegovina*, Group of Authors, Media Plan Institute (et al.), Sarajevo, Bosnia and Herzegovina, 2001 (available at www.mediaonline.ba)
8. *Media Sustainability Index 2002* (available at www.irex.org/msi/)
9. *Public Broadcasting Service vs. Commercial: TV Competing for Advertisers*, Tarik Jusia, Media Center Sarajevo, Bosnia and Herzegovina, 2002
10. "The Internet and the Public in Bosnia-Herzegovina," Jelenka Voekia-Avdagia, Bosnia and Herzegovina, in *New Media in Southeast Europe*, O. Spassov and Ch. Todorov (eds.), SOEMZ, European University "Viadrina" (Frankfurt - Oder) and Sofia University "St. Kliment Ohridski", 2003 (available at http://soemz.euw-frankfurt-o.de/media-see/newmedia/main/articles/j_avdagic.htm)

BULGARIA

1. *Bulgaria – Serbia. Access to Information Issues*. ACCESS-Sofia Foundation, Sofia, 2003
2. R. Yanovski. "Bulgarian Media Scene on the Verge of Normality." In: *Bulgaria – Yugoslavia. Journalism in Intercultural Dialogue*. ACCESS-Sofia Foundation, Sofia, 2002
3. "The Council for Electronic Media: One Year Later. Annual Report, 27 November 2001 – 27 November 2002." In: *Council for Electronic Media Bulletin*, No 10, 2002.
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5. *Image of the Other*. ACCESS-Sofia Foundation, Sofia, 2002
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3. "Media: Popularization or Vulgarization of Science." In: *Znanost i javnost, Public Understanding of Science*, edited by Blanka Jergovia, Izvori, Zagreb, 2002
4. *A Long Way to Freedom, Exit from Censorship*, European Journalism Training Association, Council of Europe and Albanian Media Institute, Tirana 2001
5. "Internet: New Interactive Communication Channel for Civil Society." In: *Communication Culture in Transition*, edited by Nora Schleicher, Akademiai kiado, Budapest, 2000.

HUNGARY

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2. Gabriella Cseh-Gábor Halmai: *The Law of Broadcasting Enterprises in Hungary*, 2001, a study financed by the Federal Ministry of Foreign Affairs and the Federal Ministry for Education, Science and Cultural Affairs of the Republic of Austria
3. *Media and Politics (Conference Papers on the Interplay of Media and Politics)* – edited by Péter Bajomi-Lázár and István Hegedűs, Új Mandátum Könyvkiadó, Budapest 2001, 270 pages
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9. *The Visegrad Guidelines – Ethical Guidelines for Hungarian Broadcast Journalists* – edited by Charles Fletcher, British Embassy, Budapest, 2001 (The book is a Baltic Media Centre Training Publication in collaboration with the British Embassy, Budapest.) – in Hungarian and English
10. Annual Report – National Radio and Television Commission, 2002 – in Hungarian
11. *Médiakönyv. – Tények és Tanok (Media Book – Facts and Studies)*, 2002 Budapest, Enamiké, Vol. I 425 pages, Vol. II 880 pages – in Hungarian

MACEDONIA

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2. Macedonian Institute for Media: *Communicate with the Media*, 2003
3. Vesna Sopar: “Press in Macedonia: Still in Process of Transition” (<http://www.soemz.euv-frankfurt-o.de/media-see/index.html>)
4. Vesna Sopar: “The Media System in the Republic of Macedonia: Between Theory and Practice in SEER,” *South-East Europe Review*, Special Issue “Republic of Macedonia,” Hans-Böckler Foundation. Dusseldorf, 2002

Source:
Macedonian Institute for Media

MOLDOVA

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4. Journalists' Union of Moldova. *Mass Media in Moldova: Findings, Evaluations, Trends*. Annual Report, 2001 (trilingual: Romanian/English/Russian).

MONTENEGRO

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Montenegro Media Institute researches:

2. *Public Opinion in Montenegro on the Daily Press*, June 2003
3. *Montenegrin Public Attitudes Towards the Periodical Press*, June 2003
4. *TV Programmes in Montenegro*, April 2003
5. *Broadcasting Media in Montenegro*, October 2002
6. *TV Programmes in Montenegro*, September 2002
7. *Radio Programmes in Montenegro*, September 2002
8. *Quantitative Analyses of Media in Montenegro and Their Professional Staff*, Montenegro Media Institute, Podgorica, July 2002.
9. *Public Opinion in Montenegro on the Daily Press*, June 2002
10. *Montenegrin Public Attitudes Towards the Periodical Press*, June 2002

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Sources:

Montenegro Media Institute

Info Sheet, July 2003, Montenegro Media Institute

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3. Media Monitoring Agency, "A Report on the Freedom of Speech in Romania"
4. Romanian Academic Society, *Policy Warning Report*, No. 1/2003
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6. European Commission, Country Report – Romania
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3. *Media Monitoring Manual*, by Snježana Milivojević, London: Media Diversity Institute; Belgrade: Samizdat B 92, Belgrade, 2003.
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5. *File on Repression. No. 5: Media in Serbia: August – September 2000*, ed. by Đura Vojnović, Independent Journalists' Association of Serbia, Belgrade, 2000.
6. *File on Repression. No. 6: Media in Serbia: October – November 2000*, ed. by Đura Vojnović, Independent Journalists' Association of Serbia, Belgrade, 2000.
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9. *Human Rights in Transition: Serbia 2001*, by Helsinki Committee for Human Rights in Serbia, Belgrade, 2002.
10. *Human Rights in the Shadow of Nationalism: Serbia 2002*, by Helsinki Committee for Human Rights in Serbia, Belgrade, 2003.

Sources:

Library of the Media Center, Belgrade
National Library of Serbia
Library of "Matica Srpska"
Bibliographical Institute of Serbia

SLOVENIA

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13. On Data Sources

On Data Sources

This section includes short comments on the available data sources about the local media landscape – statistics, national or other; databases; research; availability of audited data and existence of specialized bodies like an Auditing Bureau of Circulation; overall reliability of sources, etc. We believe that the texts offered here are able not only to explain a lot of things related to the survey itself, but also to answer some possible questions concerning data and data presentation. From a more general perspective, these texts sum up the problems encountered by the survey better than an extensive presentation. If the reader has reached this point of the book, he or she will be able to understand better the real value of the data offered on the previous pages.

ALBANIA

The media scene is characterized by very scarce data sources, and the reliability of the existing data is often questioned. There are no official data on the print media. There are data on the electronic media, available from the National Council of Radios and Televisions, but they are limited only to the licensed subjects and provide no information on the media programme, staff, or related economic matters, except when the media outlets have defaulted on payment.

Also, there are no audited data – either from state organizations or from auditing bureaus – or such data are not accessible.

So far the most comprehensive research is that done by the Albanian Media Institute and the Institute of Surveys and Opinions, financed by IREX. The AMI has been producing a report on the Albanian media landscape since January 2000. Although this research offers the most comprehensive data on the media to date, the report relies on data provided by the publishers/editors/directors of the media outlets, and there are no other sources to confirm their validity. The other survey mentioned above, conducted by the ISO and supported by IREX, was the first of its kind, since it also provided the ratings of TV stations, as well as data on the readership of newspapers and magazines and how they compare to the information received from TV and radio. However, its results are to be taken with some reservation, since the survey covered a single month and part of Albanian territory only.

Of course, there are other research polls and surveys, mainly carried out by the AMI, but they are not as comprehensive as the *Monitoring Albanian Media Landscape* report, and not as continuous. The AMI is at the moment processing the data on media outlets outside the capital, which have been neglected so far for various reasons. Other issues, starting with the relationships between media and politics, will be researched as well.

Sources:

Albanian Media Institute, IREX, INSTAT

BOSNIA AND HERZEGOVINA

There are several commercial research agencies that provide market, media and public opinion research:

Mareco Index Bosnia, company for public opinion, media and market research;

Prism Research, marketing, media and social research company;

PULS, marketing, media and public opinion research agency with office in Sarajevo.

The Communications Regulatory Agency (CRA), an independent state institution with exclusive jurisdiction over telecommunications and broadcasting in Bosnia and Herzegovina, provides information on regulation of telecommunications, broadcasting and frequency spectrum management.

Valuable sources of information on the national media scene are:

Media Plan Institute, an independent organization for research, education and development of media in Bosnia and Herzegovina and South East Europe, and particularly its online publication “Media Online”

Media Center Sarajevo, an independent education and research institution since 2000.

Data on pressures on media in Bosnia and Herzegovina can be found in the survey “Pressures on Electronic Media in Bosnia and Herzegovina: Findings of the First Comprehensive Study Period: 01 January 2001 – 01 October 2001” conducted by Internews Bosnia and Herzegovina, Sarajevo and the Faculty of Political Sciences of the University of Sarajevo (available at <http://www.internews.ba/publications.htm>).

Some information on media development, media content and decisions can be provided by the Office of the High Representative (OHR) and OSCE in the form of documents, press releases, and similar.

No comprehensive statistics on the media community and trends are offered by the country’s offices of statistics.

Links:

Mareco Index Bosnia – www.mib.ba

Prism Research Sarajevo – www.prismresearch.ba

Puls - www.puls.hr

Communications Regulatory Agency (CRA) – www.cra.ba

Media Plan Institute – www.mediaplan.ba

Media Online – www.mediaonline.ba

Media Center – www.media.ba

Office of the High Representative (OHR) – www.ohr.int

OSCE - www.oscebih.org

Internews Bosnia and Herzegovina – www.internews.ba

Sources:

Media Plan Institute, Sarajevo

European Journalism Centre, *The Bosnia-Herzegovina Media Landscape*, November 2002

BULGARIA

The issue of sources on the national media scene is quite complicated and painful. National statistics offer information in a format that could hardly be useful even for macroeconomic analysis, to say nothing of particular media fields.

There are several media-on-the-media offering data, polls, statistics, results of monitoring, marketing and other information. These data, coming from various polling and marketing agencies, are easily contestable and can seldom be double-checked. Moreover, they are limited to particular segments of the media scene and could at best serve as a reference point only.

In 2003 the CEM appears to be an increasingly reliable source of information. An Auditing Bureau of Circulation was established in 2001, but it does not cover the mainstream media. (Regular media monitoring is conducted on an ad hoc basis and under different projects that are not interlinked and compatible. Even the CEM cannot monitor regional electronic media – in fact, it cannot afford to monitor even Sofia-based electronic media regularly.) As a result, the present situation in Bulgaria is quite peculiar: *prima facie*, there is an abundance of sources and data but they are generally unreliable.

CROATIA

This report indicates the primary problem for any media research in Croatia. There is no good will for establishing a body of the type of an Auditing Bureau of Circulation or any similar independent organization that would provide this kind of information. Without research agencies like Mediana Fides, GFK or Media Metar it would be impossible to make any relevant conclusion about media trends in Croatia. The overall reliability of available sources is very low.

HUNGARY

MATESZ, The Hungarian Audit Bureau of Circulations – auditing the circulations of publications, as well as indoor media supports.

Mediaanalizis – national readership survey for Hungary carried out by Szonda Ipsos and GFK Hungary. Also measures radio audiences.

Mediagnozis – measuring advertising expenditures in Hungary.

AGB – measuring TV audiences in Hungary.

MACEDONIA

Except for the Broadcasting Council of RM, which has statistical data on the number of electronic media (radio and TV), there is no other relevant organization in Macedonia that has official and relevant data about the number of print media, e-media or the total number of the media in Macedonia. There are no specialized bodies such as an Auditing Body of Circulation.

Source:

Macedonian Institute for Media

MOLDOVA

To the titles listed in 12. “Sources on the Media Scene” one could add the *Media Guide 2002* (bilingual Romanian/English), which contains brief information on most outlets in all kinds of media. It is quite reliable. Since no systematic statistics or research exist, some good sources could be reports on the media in Moldova prepared by or for international organizations such as IREX, Article XIX, OSCE (especially on media behaviour during elections), etc., which (or references to which) can be found on the respective organization’s website.

MONTENEGRO

- Republic Statistical Department
- Broadcasting Agency
- Commercial Court

The Republic Statistical Department (official sources) uses an old methodology and do not update information regularly. Other sources are NGOs, which have conducted some surveys (some of them periodical to observe a trend), various databases and directories. The official register of media is not updated regularly. The Broadcasting Agency is a new source, which has started operating in 2003. In Montenegro there is no bureau of circulation. That is why it is difficult to say which magazines make a profit.

Source:

Montenegro Media Institute

ROMANIA

Official statistics on media are poor and incomplete. Even for electronic media, which are regulated by the State, only general information is available.

Market research studies have been conducted in recent years, initially for TV, then for publications and, from 2002, for radio as well. However, detailed information from the research is limited to those who have commissioned the studies and is not publicly available.

Sources:

Media Sustainability Index 2002, International Research & Exchanges Board

SERBIA

As repeatedly noted on various occasions already, much of the available data is incomplete or unreliable. The collection of these data implied combination of various sources and knowledge, but completely accurate figures are still lacking. The main reason is the absence or non-enforcement of media regulations. Statistics does not deal with issues of this kind and specialized bodies do not exist, nor does an accurate register of the media and their operations – which is why all answers offered here rely primarily on the polls and documentation of the Media Center, Belgrade. Fortunately for us the SMMRI Agency, which is the most frequently quoted source, is highly professional and operates in line with world class standards using highly reliable methods.

Source:

Media Center, Belgrade

SLOVENIA

The existing data sources are very limited, especially as regards circulation of print media (there are no official data, only estimates, and no body of the type of an Auditing Bureau of Circulation; the main source in this area is the National Research of Readership, but it provides data on the number of readers, not on number of copies printed, sold or given away for free). There are no official data sources on media revenue from advertising or sales, only estimates of the amount of advertising space and time, and its gross value. However, as official prices of advertising are often cut down by 20%, 30% or more, the net value of advertising revenue in private media is only estimated. The transparency of Slovenian media has in the past been very low (ownership, revenue, circulation...) and, despite the media register at the Ministry of Culture introduced by the Media Law from 2001, the level of transparency remains unsatisfactory.

On the Survey Guidelines

This kind of survey poses some theoretical problems, which deserve the attention even of readers who might by rule loathe theorizing. The text below is not a contribution to theory, but rather an explanation on the way in which some controversial issues were approached (i.e. how particular problems were solved or avoided).

Assumptions

The purpose of the Project was to present the possibly most comprehensive picture of the media in the region. Thus, it was essential that the information collected and offered be as comparable as possible. However, one of the notorious characteristics of the region for years has been the trend towards feeling different, peculiar, “unlike the others.” Substantial local national and regional peculiarities are not only believed to exist, but actually do exist in practice.

Hence it was essential to identify a common denominator for all these local landscapes which differ substantially by development, legislation, use and interpretations of particular terms. It turned out that even basic terms like “official language,” “journalists trade unions,” “cable TV,” “daily” or “magazine” are interpreted in different ways in the region.

It would have been preferable to reach a common agreement on the terms, words and approaches used in depicting the local media landscapes before proceeding to compare the local pictures. Since such agreement was hardly achievable (especially considering the time limits), we were forced by objective reasons to introduce common denominators ourselves – guided by visions that might seem from the outside too traditional, conservative, vague, etc.

The reader is therefore strongly advised to consult this text if he or she is not sure how to understand the data offered in a particular case (it might be that there is a simple explanation to *prima facie* confusing information). Most of the elements that we expected to create confusion are explained on the spot, in the notes to the tables. However, there are some general assumptions (common denominators) that ought to be discussed separately.

- The survey covers the “traditional” mass media: newspapers, magazines, radio and television. The Internet, which is a powerful source of information and communication, is approached from the same perspective: webzines (electronic newspapers) are considered as media (and not websites, as some modern media interpretations suggest). Cinema, libraries, and other means of communication, which some scholars classify as media, are not covered here.

Also, from the same “traditional” perspective we omitted some of the most innovative media phenomena (such as multimedia events like joint radio-TV programmes).

- The questionnaire applied in the survey covers the different media landscapes in terms of the local media – that is, media whose operations are based mainly inside the country. Thus “number of TV channels” means the number of country-based TV channels and not the number of TV channels that can be watched in the country. In other words, media like CNN, Animal Planet, the BBC, *Time*, *Le Monde* or *Foreign Affairs* are excluded from the scope of the survey (even though theoretically such media can also be considered as part of the local media landscape). On the other hand, the national version of, say, *Playboy*, is considered “local” since it appears in a local language and its content is locally-oriented. (True, in the section on Media Economy – for reasons of comparison – we asked a question about the number of pay-TV channels referring to domestic and foreign channels, but in these cases the word “foreign” was explicitly mentioned.)

- The issue of “official information” might be confusing too. By “official information” we understand a wide variety of sources and data along at least two levels:

The first level refers to local sources, i.e. the system of national statistics, together with the information offered publicly by state institutions (parliamentary committees, state and public structures, commissions, departments, etc.). In some of the SEE countries such data are often questioned by independent local and foreign experts. Nevertheless, contributors were encouraged to use official data when possible.

The second level involves “official information” coming from external sources with sufficient credibility (like the UN, the IMF or the World Bank). These sources use a methodology of their own, they have their own means of checking data and rich experience in statistical operations because statistics are vital to their mission.

The problems here stem from the number of sources and their credibility. National statistics were not expected to provide all the answers. “Official” sources could also offer conflicting information – for example, parliamentary reports could contradict state commissions and ministerial reports, etc. The general approach applied here was to follow strictly the source indication, as this would help the reader to distinguish between different sources and levels of credibility. When no sources are indicated, the assumption is that the contributor (data-providing media centre) have decided at their discretion on the credibility of data.

- Unofficial information. In many countries of the region there are no official sources on certain issues, but nevertheless reliable data could be provided. This level of credibility is left entirely at the media centre’s discretion. We believe that only a local expert is capable of evaluating data in such terms, taking into account the quality of the respective source (e.g. an experienced NGO, academic research, journalist trade union survey, etc.), possible verification by cross-checking, overall probability of data, etc.

- Explanatory information. We believe that against the background of differences existing between the SEE countries a set of explanations and clarifications might help the reader to better understand the local media landscape. Thus a separate part of the survey offers brief explanations on some issues that go along with the general ideas on the media (access to information, legislation, media regulation, etc). In an effort to make this supporting information user-friendly, we collected it on a comparative basis. Thus for the purpose of the survey, “explanatory information” is not the information offered in notes and comments, but in a separate chapter. What we aimed with that was (i) comparability; (ii) clarification, (iii) general evaluation of issues and trends. The format of the book allows the reader to read this chapter not only as explanation to data, but also as a separate text/directory.

- Sources of information. A general assumption under this Project was that there are problems with sources. It is extremely important to bear in mind that the Project did not aim at investigating, but at collecting publicly available data and information. Hence all kinds of sources were used, prioritizing information by credibility (say, national statistics, external sources like the OECD, Au-

ditig Bureau data, etc.). Ideally, this scheme could provide enough credible data. In practice, however, contributors were free to decide on the sources used and their credibility. For instance, the reader will easily notice that the OECD data were definitely not considered a sufficient source by the media centres. As to “audited data,” this term is simply not applicable in many countries of the region. Structures like an Auditing Bureau – regarded in the West as a reliable source of information – do not have sufficient credibility in the countries in the region, and some of the existing Bureaux exist *pro forma* only.

On Some of the Terms Used

A survey of this kind is impossible unless there is consensus on the meaning of the terms used. To the existing differences between the countries another problem was added here. The Project had to use the English language, a language foreign to all the surveyed media landscapes. This fact prompted two important decisions. First, in the section on General Information we had to avoid using words and terms subject to wider interpretation, e.g. “media outlets” or “bimonthly.” Second, it was essential to limit the interpretation of some terms, since producing definitions was not the task of the survey. Some of these limitations are explained below.

Newspaper and magazine. We were concerned with newspapers and magazines which contain journalistic articles irrespective of whether these media print advertisements or not.

(We did not try to offer definitions of a newspaper or magazine. First, there is no universal agreement on those definitions in media theory; second, every definition may be challenged on the expert level to the detriment of the survey. It is usually easy to distinguish between a newspaper and a magazine. Contributors were advised when in doubt to base their decision on the format of the periodical: a newspaper as a publication consisting of a number of large sheets of folded paper.)

The survey uses “frequency of publication” as a tool to categorize media. This approach can be contested, but any other (by content, by subscription, by design, etc.) offered by media theory will require more entries. For the purpose of the survey, “daily” means “published 4-7 days/week”; “weekly” means “published 1-3 days/week.” As for the monthlies, the category used is “published less than once a week.” The “published less than once a week” category covers print media known as monthlies, quarterlies – meaning in three month intervals – as well as “bimonthlies.” (“Bimonthly” itself is not used as a description in the survey, since it could mean either “twice a month” or “every two months.”) This category

does not include media published on a longer than quarterly basis such as biannual journals or yearbooks.

Circulation figures show the average circulation and include the number of issues (i) sold directly, (ii) sold by subscription, and (iii) distributed free of charge both in the country and abroad. As a measurable quantitative indicator, circulation is also used to rank the print media in tables; this ranking is purely numerical and does not have any qualitative implications regarding the respective media's influence, quality, public trust, etc.

Coverage could be defined as the territory which is technically covered by the signal, or as the number of people on that territory. It also refers to the media audience, for example readership – the number or the share of the audience; hence the term can be used for print media too.

In the context of this survey, “coverage” is understood in purely geographical, and not in social, economic, gender or other terms. For example, for the print media “national” means nationwide distribution in general. “Regional” means coverage of part of the country – such as the southern part or a specific area populated by an ethnic group. “Local” means coverage of an area that is smaller than the region, e.g. a city or local community. For TV and radio, a distinction is made between “national” and “local” only, which are again understood in geographical terms. In other words, “national” means “nationwide” – as opposed to “local” (more limited than national).

As the survey shows, this scheme (the distinction between “national” and “local”) can work even in countries where there is no official distinction (for example, separate licensing procedures for national and local electronic media) between the two types.

Ownership. The issue of media ownership is very specific and this survey could only scratch the surface of the problem. For the purpose of comparability, the survey applies several options of gathering and presenting information. In indicating the type of ownership, the public/private distinction comes first; next comes the nationality of the capital – for example, local, foreign or mixed. (In the context of ownership, “local” refers to the origin of the capital and should not be confused with “local coverage.”) Where available, additional information (for example, the name of the owner) is provided.

Electronic periodicals. There are a number of other terms for such media, e.g. Internet media, electronic newspapers, electronic magazines or webzines. Some of those media also offer services, advertising, links, chatrooms, etc. – but, on the other hand, various websites could be

expected to do the same. To avoid theoretical speculations on the definition of Internet media, this survey uses the term “electronic (online-only) periodicals,” meaning online-only media that offer mainly news/opinions on a regular basis at least once a month. This definition is essential in distinguishing electronic periodicals from the vast realm of websites that offer regularly updated information. This term also clearly indicates that such media are not to be confused with electronic versions of print media.

General interest and specialized channel/station. This term is used for electronic media even though in several countries of the region it does not have a precise definition. For the purpose of this survey, “general interest channels” are opposed to “specialized” channels primarily on the basis of programme content. As there is a broad variety of channels, “general interest channels” are presumed to include all or most of the content of specialized channels: news, current affairs and debate, political shows, sport, music, drama and fiction, entertainment, etc. “Specialized” channels are channels with one prevailing content component (such as Turner Classic Movies, Discovery Channel or Animal Planet). Applying the term to radio is riskier, but nevertheless seems justified if it is based on content component/s.

For the purpose of this survey, “**imported products**” mean products coming from a foreign source (e.g. neighbouring country, an EU country or the USA), whereas “**external products**” means products that are external to the media or, in other words, come from a non-foreign source that is external to the particular media (e.g. from some other media, local media pool or state-controlled institution).

For the purpose of this survey “registration” is to be interpreted as the act of adjusting something to match a given standard. As far as the media are concerned, this presupposes a relevant procedure and/or documents certifying the act of registering.

Thus “**registered**” (e.g. registered broadcasters, registered channels) means media, units, etc. that have passed the procedures of registration according to the respective country's law, standards and practices (licenses, certifications, etc.), no matter whether these procedures include the word “registration” or not. (“Registered Internet users” does not mean that there are licensing procedures for usage of Internet, but that there exists registration – be it on the part of the service provider for reason of payment.)

Drama and fiction stands for a product commonly described in most of countries in the region as “films” or “movies.” The main reason for insisting on “drama and

fiction” was to differentiate between movies and the so-called non-fiction films (education, documentary, ethnographic, etc.).

Electronic media units may cause serious misunderstanding and confusion, as all too often different sources use different terms in English: television, TV operator, TV network, broadcaster, station, channel, programme. In some cases those terms might be inadequate for the local media scene and the existing legal framework, especially considering that they are usually used in local languages in similar forms as in English, but not necessarily with the same meaning as in English.

For the purpose of the survey, the “order” in using these terms was established along the following lines: Generally speaking, a radio or TV operator/broadcaster might own and/or use a network of two or more stations. TV stations might broadcast through channels one or more programmes – of national or local coverage (“channel” or “television channel” meaning only that portion of the electromagnetic frequency spectrum which is capable of carrying one standard television signal). Following this explanatory scheme seemed to us the only way to avoid complications of using excessively “channel” as a synonym of “station,” “TV” and “programme.”

Internet penetration does not depend only on the number of PCs, but also on the number of people who actually have access to the Internet. Thus the number of registered Internet users is data that had to be obtained statistically, while the number of people using the Internet had to be obtained by sociological means (polls). The two figures could not coincide, since they approach the Internet penetration issue from different angles.

The term “non-commercial” media is used in dozens of meanings (such as “non-profit,” “media which are dis-

tributed for free or which are published by non-profit making organizations,” even “well-meaning media”). It could include the Internet, public access TV programmes, etc. For the purpose of this survey, “**non-commercial TV channel**” means a non-advertising TV channel.

Pay-TV is used mostly for a “TV service where TV programmes are transmitted in a scrambled form and where payment is a condition for these TV programmes to be descrambled and reproduced by a TV set when received.” Pay-TV could be synonymous with “broadcasting on a special pay cable channel.” For the purpose of the survey we focused on the arrangement under which a charge is made to a subscriber for receiving a particular television programme, as well as on scrambling/descrambling technical option. In other words, “pay-TV” is not to be confused with packages of TV channels offered by cable providers. To be sure, these packages are paid for, and therefore could be understood as “pay-TV.” However, TV programmes of this kind are not broadcast on the basis of a separate arrangement for receiving a particular programme and broadcasting does not include a scrambling/descrambling technical option.

Revenues and advertising. The revenues from sales of each media consist of sales of its own production + incomes from advertising:

For print media: Newspapers sold + advertising space sold.

For electronic media: Programme products sold + advertising air-time sold.

There are some other terms which are explained on the spot, as there is no common agreement on their meaning despite their intensive usage (e.g. “hate speech”), or they are used with different meaning (e.g. “local”).