

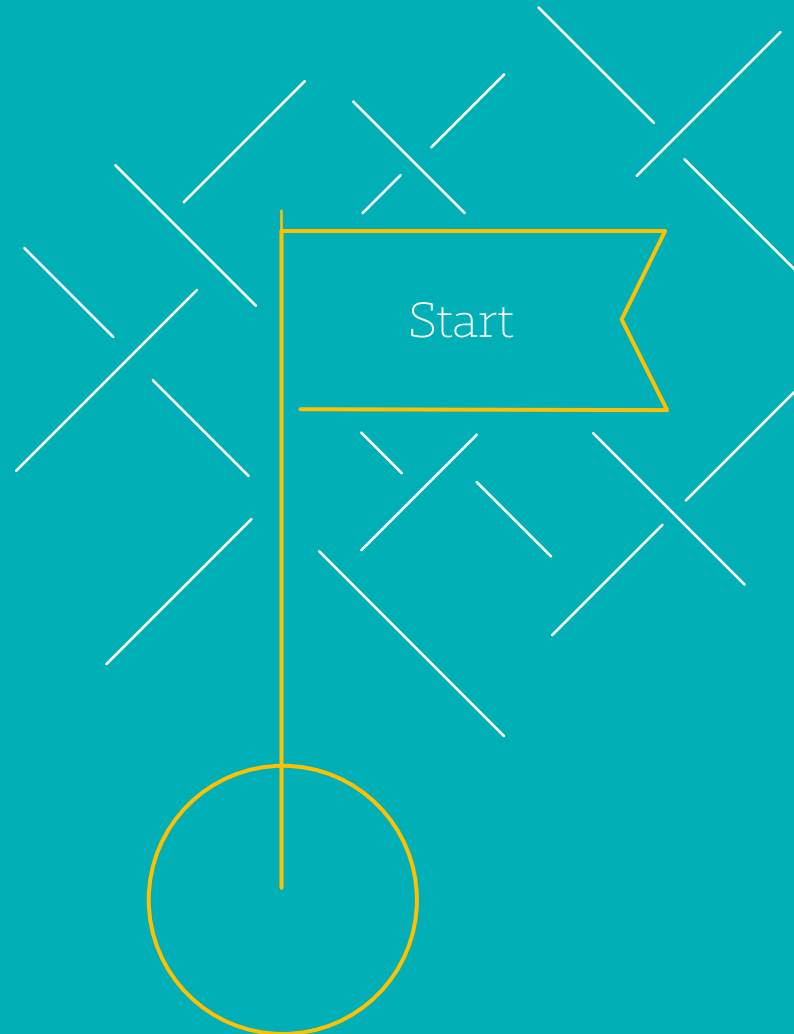
DIGITAL

Sustainability

Understanding the Needs of Online Local Media in Serbia and Croatia

Summary

This study provides answers to questions about the state and real needs of local digital media in Serbia and Croatia, as well as raising the awareness among their publishers and editors about the importance of development in certain areas of digital journalism.



Chapter >

Through the questionnaire method, representatives of local digital media outlets (editors or publishers) in the two countries responded to questions that relate to determining the profile of local online media, the local environment, profiles of employees and associates and the staffing needs of the media, data on the technical level of the media, as well as their technical needs, the internet and security, use of social networks and needs in this area, content and its creation methods, and assumptions which would, when complied with, enable the improving of content, copyright issues, data on operations, promotions, networking and general security.

The study also encompassed important external influences that impact on the publishing and stability of the media, such as the legal frameworks of the two countries, political and economic circumstances, the level of development of the media scene, characteristic forms of ownership and analysis of the role of the State in creating conditions for the work of local online media.

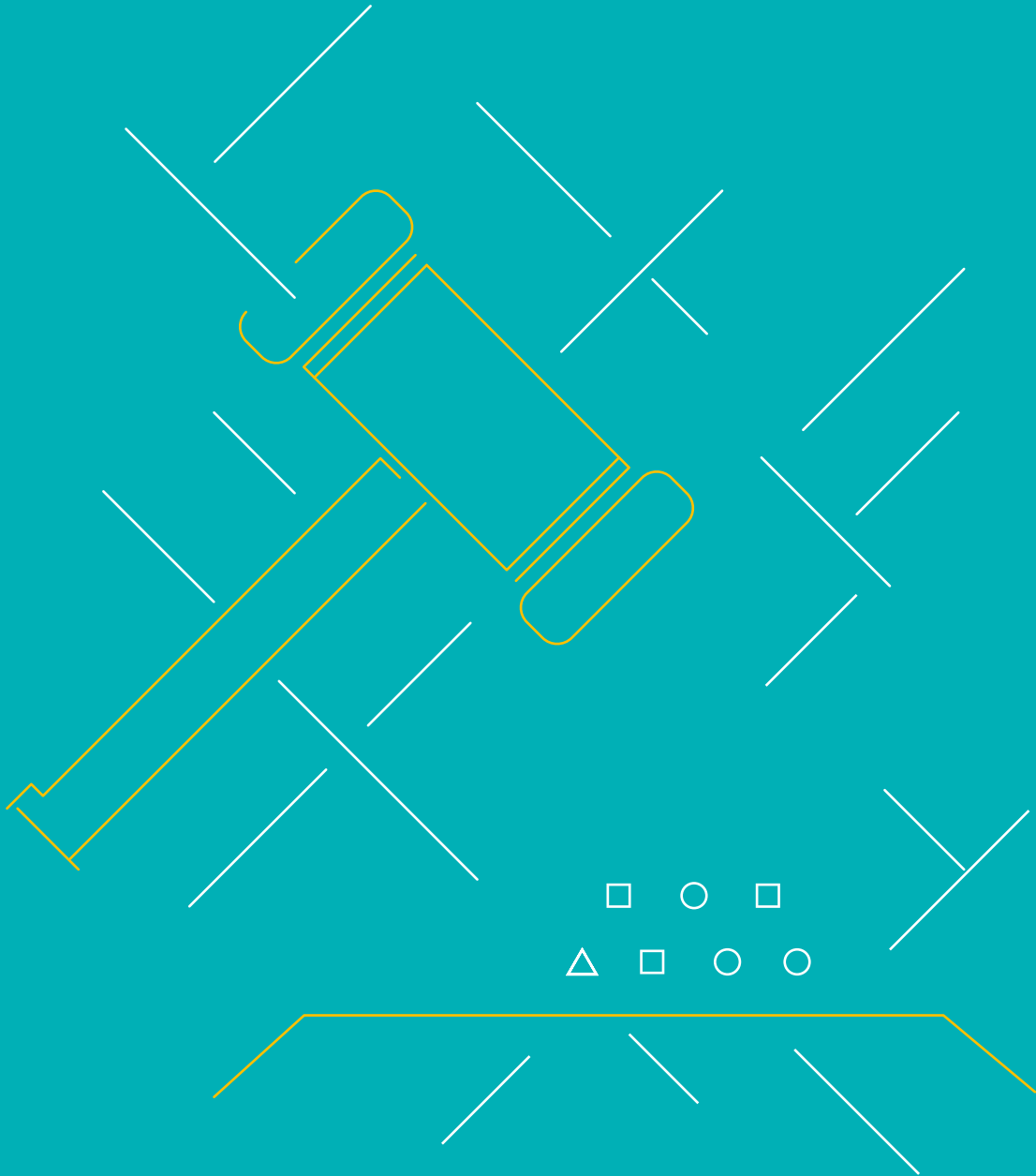
Comparing the data obtained in Croatia and Serbia enables the

acquiring of insight about how particular public media policies, and the wider socio-political context of these countries result in an appropriate state of local online media and, in connection with this condition, appropriate satisfying of the rights of residents of local communities to be informed.

The results will allow the conductors of the study, the **Slavko Ćuruvija Foundation and the Association for Independent Media Culture**, to plan their future programmes by relying on the real needs of local online media. The results will also help other institutions and organisations that work in this area.

FONDACIJA
SLAVKO
ĆURUVIJA
FOUNDATION





II

Legislative
Framework >



The Public Information Act¹, which was in force in Serbia until 2014, cited the **Internet and other electronic editions of noted public media** among types of public media. This Law ceased to be valid in 2014, when a set of media laws came into force - the Law on Public Information and Media, the Law on Electronic Media and the Law on Public Media Services². The adoption of these laws advanced the legal framework in the media field, in compliance with the 2011 Media Strategy and continued harmonisation with EU law in this area.³

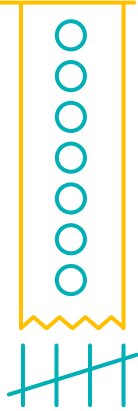
The 2014 Law on Public Information and Media implies under the term media, among others, **electronic editions of other media**, as well as **independent electronic publications (editorially designed internet sites or internet portals)**, and which are registered with the Media Register.

The Law states explicitly that internet-browsers and aggregators, platforms, such as internet forums, social networks and other platforms, or any other individual electronic

publications, like blogs, web presentations and similar electronic presentations, are not classed as media unless registered with the Media Register. Such a definition and explicit stating of what media are does not ensure legal certainty, while the Law also provides a choice of whether or not to register.

Online media are also defined in the same way by the 2014 Law on Electronic Media. The same law also regulates the organisation and work of the **Regulatory body for electronic media**, which carries out public authorisation with the aim of: effectively implementing established policy in the field of providing media services in the Republic of Serbia; improving the quality and diversity of electronic media; contributing to the preservation, protection and development of the freedom of opinion and expression; with the aim of protecting the public interest in the field of electronic media and protecting users of electronic media, in accordance with the provisions of this law, in a manner befitting a democratic society.

In Croatia, the status of online media was legally regulated for the first time by the 2003 Law on Electronic Media⁴. This law established the official name for them as **“electronic publications”** and they were included, along with television and radio programmes, as one of three types of electronic media. The initial definition of electronic publications has to date been subjected to numerous amendments, which indicates that the legislator has not found the right way to define the internet media. Today the valid definition of “electronic publications” is confirmed by amendments to the Law from 2013⁵: “Electronic publications: editorially designed programming contents that are published **daily or periodically** via the internet by a provider of electronic publications for **the purpose of public information and education**.” The Law on Electronic Publications provided obligations in the same way as other electronic media in terms of the ethics and professionalism of reporting, the prohibiting of hate speech etc.



The 2003 Law ensured the legal basis for the constituting of the **Council for Electronic Media** as the competent regulatory authority, whose seven members are appointed by Parliament for a period of five years. Based on the 2007 amendments to the Law⁶, the **Agency for Electronic Media** was also established, which practically functions as an expert body of the Council.

REGISTERING

Following legislative amendments of 2013, the Council for Electronic Media of the Republic of Croatia adopted a Recommendation on the registration of providers of electronic publications in the Register of Providers of Media Services⁷, together with the criteria for inclusion in the register. The adoption of this bylaw created the legal presupposition for the establishment of the register of “electronic publications”, thus from 2014 to the present day around 350 portals have been registered in it, of which we recognise 115 (as of 15th August 2016) as local⁸. We estimate that 30 to 50 per cent of portals have not yet

submitted a request to the Council for registration, or that they are not yet registered.

In Serbia, the Business Registers Agency (APR) began leading the Media Registry as of February 2015, with which the Register of Public Media ceased to exist. The Media Registry was introduced with the aim of providing the public with information on ownership stakes and shared financial resources and this register makes more data available to the public compared to the previous one. The same rules apply for registering electronic publications as for the registration of other media.

Registration in the Media Register is not mandatory, but media companies that are not registered do not have the opportunity to participate in project-based co-financing on the part of bodies of the public authority, and bodies of public authorities are forbidden from advertising in these media and using their services.

The rules on registration are specified in more detail in the Guidelines on documentation, which are submitted in the process of

registering media in the Media Register⁹.

The number of registered online and other media in the Register is not easily accessible to the public, though it is possible to access this information via the APR’s service for delivering data.

1. Law on Public Information (Official Gazette of the Republic of Serbia, issue #43/2003, 61/2005, 71/2009 and 89/2010 – decision US and 41/2011 – decision US))
2. Official Gazette of the Republic of Serbia issue #83/14.
3. European Commission Report on the Progress of Serbia 2014 http://www.seio.gov.rs/upload/documents/eu_dokumenta/godisnji_izvestaji_ek_o_napretku/Izvestaj_o_napretku_dec14.pdf
4. The People’s Newspaper (official gazette of the Republic of Croatia) 122/03
5. The People’s Newspaper 94/13
6. The People’s Newspaper 79/07
7. The People’s Newspaper 109/14
8. <https://pmu.e-mediji.hr/Public/PregledElPublikacije.aspx>
9. Official Gazette of the Republic of Serbia issue #83/14

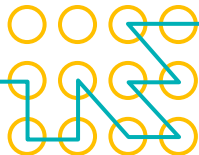


III

Role of
the State >

The Strategy for the Development of the Public Information System in the Republic of Serbia until 2016¹

was adopted in 2011. It is stated within it that the government will encourage technological innovation in the media sector and the development of new media platforms. It highlights the fact that new media platforms are changing rapidly and because of that the state does not want to limit their development. With this document the State recognises the internet as a basic human right, as a public good that is easily accessible and open to everyone in the sense of freedom of expression and informing. It is stated that the Republic of Serbia will use the legal framework to guarantee freedom of expression on the internet, taking into account the fact that restrictions on freedom of expression are acceptable only in those cases when that is envisaged by the law, international standards and international law.



In Croatia, at the beginning of 2012 the Ministry of Culture announced the development of a strategy of public media policies, which should encompass the issue of the internet, as well as issues of local media. In the next four years, the Ministry designed and published “Working material for debate on media policy of the Republic of Croatia”², but did not launch a public debate about that, nor was “media policy” adopted and brought into force through any state body. With the change of government in early 2016, work on the adoption of this document halted.

FINANCING FROM PUBLIC FUNDS

The Set of media laws from 2014 systemically define the basic mechanism for the budgetary financing of media content in Serbia for the first time. Budget funds of the Republic, the Autonomous Province of Vojvodina and local self-governments can be used only for co-financing projects in the field of public informing with which some of the legally

defined public interests are realised. Other forms of co-financing, with a very narrow circle of exceptional cases, are prohibited by law. Alongside this, a special law that regulates the status of public media services envisages the introduction of the obligatory payment of monthly fees as the main source of financing of these media. This new legislation also assumes specific mechanisms for recording the spending of budget and other public funds³.

According to research conducted by BIRN⁴ in 2013, it was concluded that the majority of content was distributed through media with a local and regional character, while the least went via media with national coverage. Such a geographical distribution can be interpreted as a justified decision to financially support weaker media, which cannot compete in the advertising market, or as a lack of interest among national media to apply for relatively modest funding.

From the mentioned sample it can be seen that a very small number of online editions received financial support, around 10%.

The 2003 Law on Electronic Media envisaged in Croatia the establishing of the **Fund for the pluralism and diversity of electronic media**, the resources of which should “encourage the production and broadcasting of programming content of electronic media at local and regional levels that is in the public interest, and which is particularly important for exercising the right of citizens to public informing, national minorities in Croatia, encouraging specific programmes in regions of special state concern, encouraging cultural creativity, the development of education, science and the arts.” It was determined that the Fund be managed by the Council for Electronic Media.

The Fund is to be filled with the allocating of 3% of revenue generated from subscription for the needs of Croatian Radio and Television. In this way, the Fund annually gathers around 35 million kuna (EUR 4.6 million).

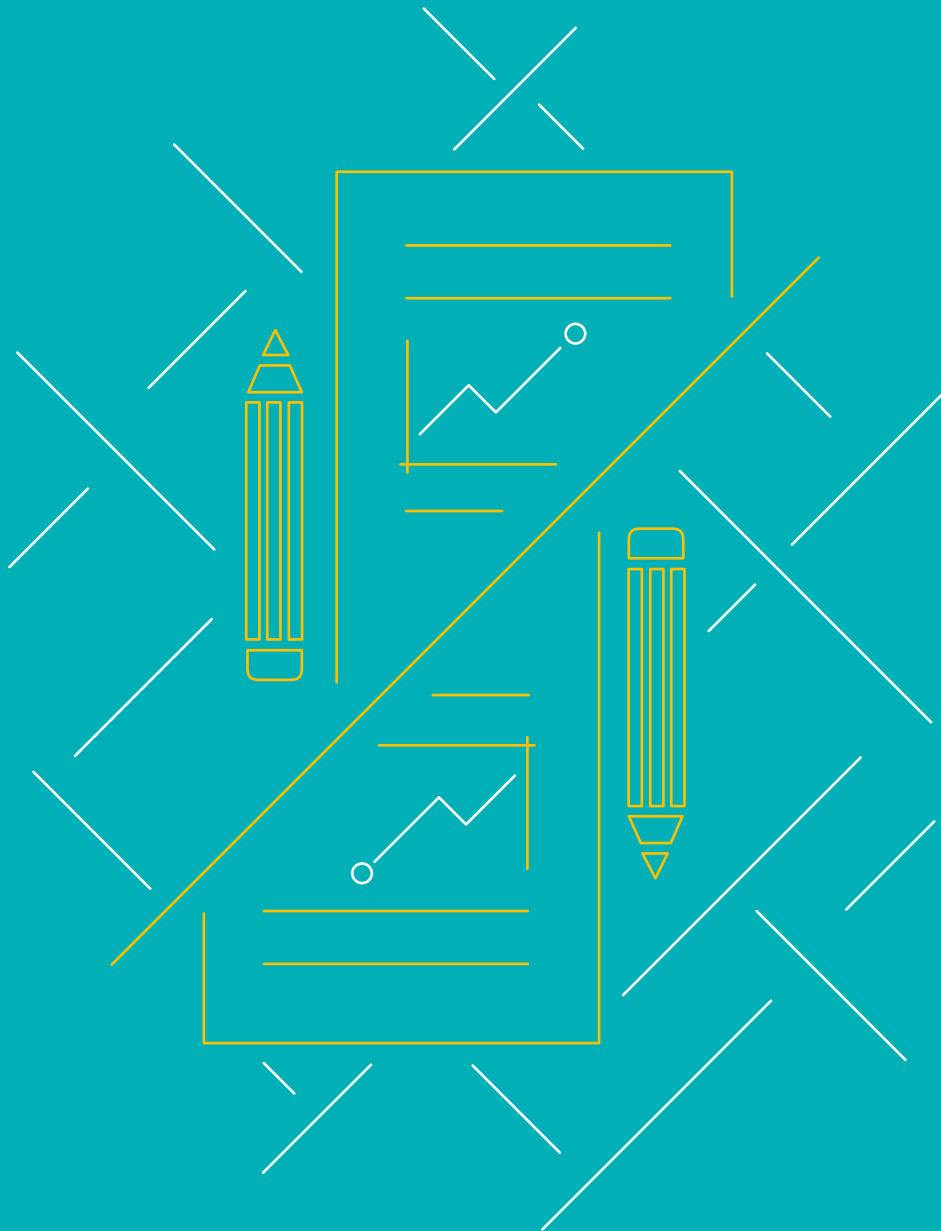
The initial intention of the legislator was for the establishing of the Fund to encourage the production of local content in the electronic media. However, when the Fund was opened up to portals after 10 years, based on legislative amendments it could only be accessed by those local portals whose publishers were non-profit businesses. The bulk of the resources of this Fund are allocated to local TV and radio stations.

Non-profit local portals could also generate support from the **programme for non-profit media**, which was launched in 2006 by the National Foundation for Civil Society Development, only for the implementation of the programme to be determined by the Ministry of Culture according to a decision of the Government from 2013. In the last three years this programme has allocated a total of about 500,000 euros. According to a decision of the Government from 2016, that programme was shut down, with the responsible Minister explaining that it was politically arbitrary and unsatisfactory in terms of procedures.

Individual units of local government/ self-government also have their own pro-

grammes to support portals. However, although it relates to donations of local governments, funds are more often awarded to portals that are not primarily local. For example, of the 21 portals to which the City of Zagreb distributed 1.2 million kuna in 2015, four were of a local civic character and they received a total of 230,000 kuna (EUR 30,670).

1. Strategy for development of the system of public informing in the Republic of Serbia to 2016 (“Official Gazette of the Republic of Serbia”, issue #75/2011)
2. <http://www.min-kulture.hr/default.aspx?id=12069>
3. <http://cups.rs/wp-content/uploads/2015/05/BUD%C5%BDETSKO-FINANSIRANJE-MEDIJA-I-MEDIJSKIH-SADR%C5%BDAJA-Trenutno-stanje-i-perspektive.pdf>
4. <http://birnsrbija.rs/wp-content/uploads/2015/05/BIRN-Izve%C5%A1taj-o-finansiranju-medi-ja-iz-bud%C5%BEeta-lokalnih-samouprava-smanken.pdf>

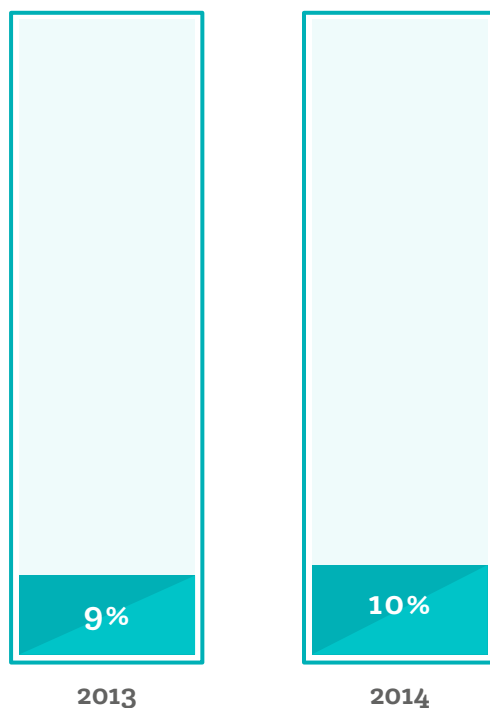


IV

Economic
Framework >

SERBIA

Analysis of the media market in Serbia that was conducted in 2015 by Ipsos Strategic Marketing states that the internet had a 10% share in the total amount of advertising for 2014, while in 2013 that share was 9%.



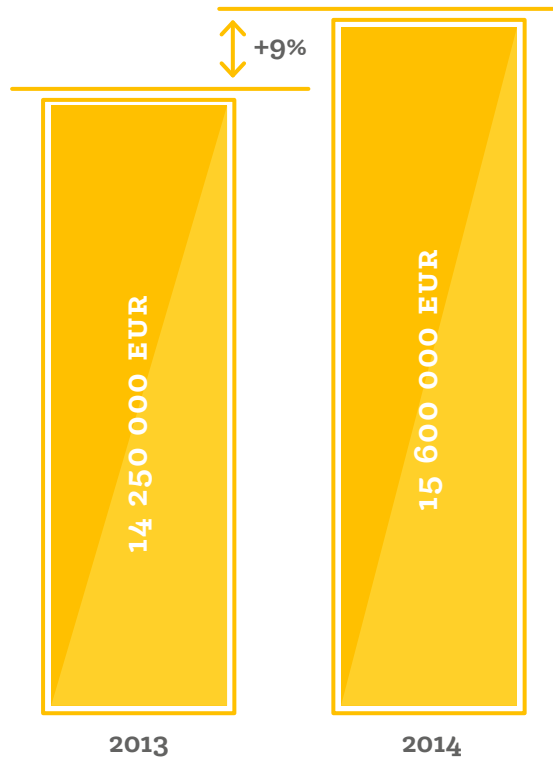
According to the estimates of *Nielsen Audience Measurement*, the total advertising market in Serbia in 2014 amounted to 156 million euros. From 2008 to 2014, when the highest value of the mass media advertising market in Serbia was recorded, the value of investments fell by almost a quarter. In 2014, 18.2 million euros was directed towards internet advertising (83 million euros was directed towards TV advertising, 7 million to radio). Advertising on the internet has recorded significant growth (while advertising on TV declines, recording a decrease of 27% in 2014 compared to 2008, and radio maintains a certain continuity). This growth, however, is not sufficient to compensate for the decline in investment recorded by the entire market. Thus, it is not possible to compensate for the decline in the advertising market that started back with the crisis of 2008 through growth in online advertising, regardless of the ever increasing use of the internet. The fact that the monitoring of advertising still exists only for television and print is just one of the indicators of the poor financial situation in which the media find themselves in Serbia.¹

According to the noted study, during 2014 the most significant changes in the use of media took place in the use of the internet. The internet is a medium which people use 27.2% more. This primarily relates to the younger population, aged 15-29 and 30-39, who spend significantly more time using the internet. This highlights the great economic potential of the internet when it comes to advertising. We can compare these figures with the results of research of the Croatian public from 2013/14, which was commissioned by the Agency for Electronic Media. They show that 80.4% of respondents aged between 15 and 34 rely on the internet as a source of information, which for them even at that time was already equal to television. This is one more indicator of the strong economic potential of internet portals when it comes to advertising.



CROATIA

Statistics of the Croatian Association of Marketing Communication from 2015 show that, similarly to Serbia, the internet recorded the strongest growth of advertising compared to all other media in 2014, totalling growth of 9%: from 14 250 000 EUR in 2013 to 15 600 000 EUR in 2014.



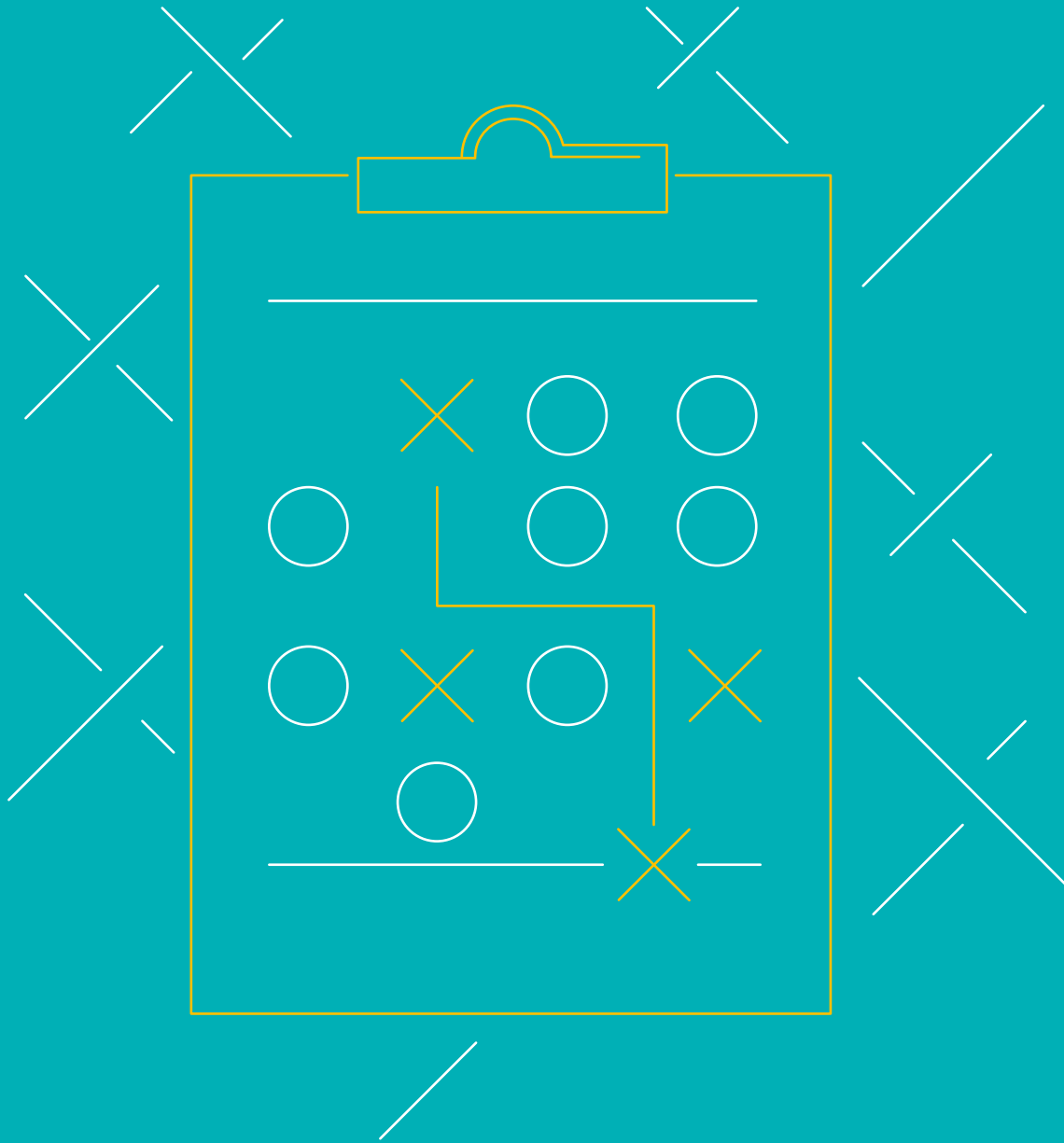
In that year, the internet accounted for around 8% of advertising revenue, which was a slightly smaller share than in previous years, as advertising in other media also began to recover.²

However, the “Working materials for debate on the media policy of the Republic of Croatia” of the Croatian Ministry of Culture³ reduce the space for optimism in relation to the assumption that such a situation with advertising could have a positive impact on online journalism: There are at least two major difficulties with advertising on the internet as a source of funding for journalistic work. Firstly, advertisers do not have a special need for their advertisements to be consumed by a news media audience: if the most visited, as is the case in the Croatian language area of internet, are pages with recipes and small ads, then advertising revenues will end up with them, and not with the owners of news editorial departments. Secondly, the most visited internet newsrooms in all countries are actually Google’s and Facebook’s (...). In other words, if all news-

papers, along with revenue from advertising and savings thanks to technology, relocated to the internet, some substantial money would still be missing. More specifically, that part required for funding journalistic work would be missing.” (P.15)

“Working materials” warn that “the consequences of the business model of commercial media directed towards reducing expenses for journalistic salaries at the expense of product quality, the accelerated effects of the recession and technological change, led to the Croatian media being dependent on the market to the brink of sustainability.” (P. 21)

1. <http://www.rra.org.rs/uploads/useruploads/PD-F/6529-Analiza%20medijskog%20trazista%20u%20Srbiji%20-%20final.pdf>
2. <http://www.netokracija.com/ulaganje-oglasavanje-hrvatski-mediji-2014-105936>
3. <http://www.min-kulture.hr/default.aspx?id=12069>



Rationale and
Objective of
the Study >



In the last 10 to 15 years, a large number of online media have been established in Serbia and Croatia that operate at the local level and, to a greater or lesser extent, satisfy the needs of local communities for information.

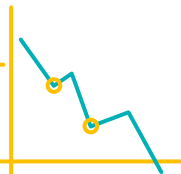
It was necessary to conduct research in order to determine the real needs of these media outlets, which is a necessity for understanding the broader context and for the strategic planning of the future activities of the organisations conducting the research (The Slavko Ćuruvija Foundation and the Association for Independent Media Culture) in this field, and in terms of providing support for the development of digital media. There is also an assumption that all other organisations and public institutions that target the general improvement of public informing, or its improvement at the local level, have a need for information on the state and needs of local online media, the likes of which are provided by this study.

The aim of the study consists of determining the state and the real needs of local digital media in Serbia and Croatia, as well as the level of awareness of their publishers and editors of the importance of development in certain areas of digital journalism in the fields of: determining the profile of local online media; the local environment; the profile of employees and associates and the staffing needs of the media; data on the technical level of the media, as well as their technical needs; the internet and security; use of social networks and needs in this area; content, the method of its creation and assumptions that complying with would allow the improvement of content; copyright issues; data on operations; promotions and networking; general security.

The aim of comparing the data gain in the two neighbouring countries is to obtain clearer insight into how certain public media policies applied in Serbia and Croatia, as well as the broader socio-political context of these countries, results in an appropriate state of local online media. To this end, the

survey covered aspects such as the legal frameworks of the two countries, political and economic circumstances, development of the media scene, characteristic forms of ownership and analysis of the role of government in creating conditions for the work of local online media outlets.

Serbia and Croatia share many similarities with regard to the political and media culture and the level of social and economic development. They also share many problems in the media domain, such as their problematic sustainability due to long-lasting economic crisis, as well as mounting pressure from political and financial spheres. Simultaneously, slightly better economic conditions in Croatia, as well as its status as a full member of the European Union, provided sufficient differences for comparisons with Serbia to be practical.





All media issues in the two countries are even more pronounced at the local level, due to the orientation of the advertising market towards the national level, and because of limited public funds that are directed towards local media, whilst pressures and violations of media freedom at the local level are not afforded enough attention from the general public.

METHODOLOGY OF THE STUDY

The survey was conducted using a combined method of detailed and comprehensive questionnaires and in-depth interviews with analysis of the resulting data, employing the following procedure:

- a. Preparation of survey questionnaire;
- b. Distributing of questionnaires to all local online/internet media outlets/portals;
- c. Analysis of data obtained on the basis of responses received;
- d. Selection of portals for in-depth interviews;
- e. Conceiving of in-depth interviews;
- f. Conducting in-depth interviews;
- g. Final analysis and processing of obtained data;
- h. Analysis of the social and political context (legislative framework, political and economic conditions, development of the media scene, typical forms of ownership, the role of the state in the status and needs of the local media, online media specificity).

Sample: the study's intention was for the questionnaire to include all local news portals in Serbia and Croatia. The questionnaire was sent to the addresses of 138 portals in Croatia (114 registered with the Agency for Electronic Media and 24 unregistered), and the addresses of 111 portals in Serbia. Answers to the questionnaire were sent by a total of 21 media portals in Croatia (15%) and 39 in Serbia (35.1%).

The questionnaire included the following groups of questions: general information; local surroundings; employees and associates; technical data; cyber security; social

networks; media content; copyright issues; business information; networking; general security.

Eight portals were selected for in-depth interviews (4 in Croatia and 4 in Serbia), which were carried out on the basis of ratings given by respondents regarding the importance of certain areas (sets of questions). This criterion was mixed with geographic distribution and size of the portal's host town.

In Serbia, respondents rated material conditions as the most important area. Further analysis showed that there is a much bigger problem on the revenue side than on the expenditure side. In fact, almost all respondents have a dominant source of income, or more than 50 per cent of their revenue comes from only one source (while 19 portals in Serbia are mostly financed from the state budget, and 10 from commercial revenue - advertising and sponsorship. Moreover there are media outlets that have no income (5 of



them), and only one notes project funding from non-government sources as the predominant source of income (*Južne vesti*). Thus, the formula applied in Serbia was: 1 portal which has no income, 1 which is financed from the state budget, 1 which is financed by advertising and 1 with project financing from non-government sources. It was also taken into consideration that 10 of the 39 portals in Serbia that responded to the questionnaire are bilingual, thus one of four portals selected for in-depth interview had to be bilingual.

This brought us to a fairly clear picture of the 4 portals with which we later conducted in-depth interviews: the *Grad Subotica* portal from Subotica (bilingual); the *Media Centar* from Bor; *Zlatar info* from Nova Varoš and *Južne vesti* from Niš. In Bor we performed an additional in-depth interview with the portal *Ist Media*, and in Subotica with the portal *Magločistač*. The *Magločistač* site is bilingual (also publishing content in Hungarian), and the publisher, unlike other selected media, is a civil society association.

In Croatia, portals gave the most importance to topics of the local community. Highlighted in first place in the ranking of challenges were problems related to a lack of associates and a lack of money. When analysing answers to the question “What are your needs when it comes to the local community”, in 12 cases we received variations on “financing” (incentives, grants, subsidies, material assistance, more money, clearly defined criteria for financing, funding free of the arbitrariness of local authorities, project financing etc.), which shows that funding is the most pronounced need. On the basis of this, we found that the local media in Croatia place demands for the resolving of material needs at the local level. We concluded that we should place these two factors (local focus + satisfying material needs) in a cross-section when selecting portals for in-depth interviews. In doing so, we should cover four main regions in Croatia: Slavonia/Međimurje/Podravina/Zagorje, Dalmatia, Central Croatia, Istra/Coastal/Kvarner. We left Zagreb out for the purposes of this survey, as we only received one response from this city.

On this basis, we made the following selection of portals for in-depth interviews: Slavonia – *Osijek news*; Istra – *Parentium*, independent portal of the City of Poreč; Central Croatia – *Ličke novine*; Dalmatia – *Info zona* (non-profit publisher, specialising in regional topics of interest to the youth).

The conceiving of in-depth interviews: the concept of in-depth interviews was set on the basis of analysis of data acquired from the survey. Additional questions were directed in two directions - 1) clearer identification of regularities valid for all local portals or groups thereof; 2) highlighting specific features, especially with consideration for “problems” and “solutions”.

Analysis of social and political context: available official data related to the context was used for analysis, as well as the existing legal frameworks in Serbia and Croatia.



VI

Profile of
Surveyed
Media >

Answers to the questionnaire were sent by a total of 21 media outlets in Croatia and 39 in Serbia.

In Croatia, the surveyed media outlets were on average founded 6.5 years ago, with the oldest founded in 2001 and the youngest established in 2016. The surveyed media outlets in Serbia are somewhat younger. Their average age is four. The oldest was founded in November 2002 and the youngest in May 2016.

CLASSIFICATION

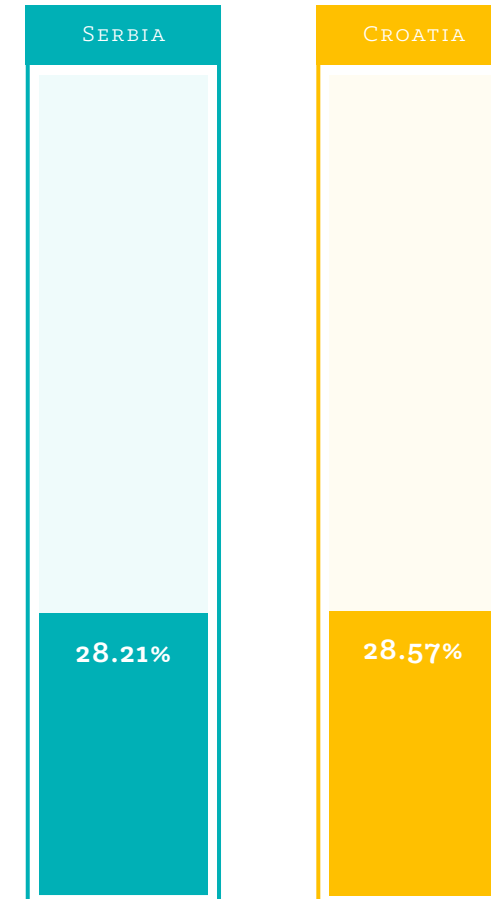
Respondents were offered eight categories of media in which to classify themselves. If they did not identify themselves in any of the offered categories, they were given the opportunity to define their own category in which they belong.

Most of them identified themselves as a News Site, or rather, as defined in the questionnaire, “a site that regularly publishes

news, information and other content, primarily from its own production, according to a decision of the chief editor or editorial board”, in Serbia there are three quarters (74, 4%) and in Croatia two-thirds (66.7%) of such sites.

While in Croatia we find a greater variety of formats, although there is no more than one media (or by 4.8%) in any of the other offered categories, Serbia is more uniform, so the next category in terms of representation is Internet Magazines, or “a site that publishes longer freelance articles” (15.4% or 6 media companies). Two sites in Serbia, or 5.1%, selected the option of Aggregator (one, or 4.8%, in Croatia), and one each, like in Croatia, chose Internet Radio and Blog. In Croatia we have one each that defines itself as Internet TV, Community Site (where the authors themselves decide what to publish, without the mediation of the editor) and an “Internet edition of other media”. While none of the surveyed media in Serbia felt the need to define their own category, in Croatia this was done by two respondents (9.5%).

PERCENTAGE OF WOMEN AMONG CHIEF EDITORS IN MEDIA OUTLETS



FORM OF ORGANISATION

When it comes to the form of organisation, the situation differs significantly in the two observed countries. While in Croatia in the largest number of cases (10 or 47.62%) they are publishing trade companies, in Serbia citizens' associations as publishers of internet media prevail (16 or 41.03%). Nine are companies in this role in Serbia (23.08%).

The *Magločistač* portal (Subotica, Serbia), in the context of an in-depth interview, stated that the reason they chose to register as an association was that they had previous experience with this form of organisation and that, in the context of this form, they are able to engage in other civil society activities besides media publishing.



MISSION STATEMENT

“Today, journalists are activists more than they are journalists.”

Natalija Jakovljević Ivanić, journalist of the *Magločistač* site, Subotica, Serbia

In five cases in Croatia they are publisher associations (23.81%). Those surveyed are publishers of media in 23.81% of cases in Croatia, or 23.08% in Serbia. Alongside that, the publisher of one of the media in Serbia is the National Council of the Slovak National Community, so this media outlet is registered as an institution, while four respondents are not officially registered in any form.

In Croatia, in three cases the surveyed internet media operate as part of the activities of larger media publishers (14.29%). Some 13 portals in Serbia declared themselves as being part of larger media systems that have some other method of publishing (33.33%). It was most common for video production to account for additional activities (11 cases). In Serbia, 31 of the respondents are registered

with the official Media Registry (79.5%), one has submitted its application for registration and at the time of completing the questionnaire was still awaiting its confirmation documents, while seven of the surveyed media have not even filed an application for registration. In Croatia, where – in contrast to Serbia – registration is a legal obligation for the media, in the Register of Providers of Electronic Publications, which is led by the Council for the Electronic Media, almost all respondents are registered (one media outlet's registration is still pending).

In Serbia, a total of 16 media outlets (41.03%) stated that they are members of some association, with 14 belonging to media associations and two belonging to some civil society umbrella organisations. In Croatia, in four cases the surveyed media outlets are part of larger media associations (19.05%).



PUBLISHING LANGUAGE

In Croatia, in 100% of cases the language of portals is Croatian, while in Serbia it turned out that as many as eight of them (20.51%) publish in some minority language, although all of the surveyed media also publish in Serbian. This is slightly higher than the share

of minorities according to the last official census in Serbia from 2011 (12.88%). Most of them stated the Hungarian language (4), while two media outlets each publish in Bosniak and Roma, and one each in Slovak and Albanian.

SERBIA

WENT THROUGH SOME KIND OF TRAINING



53.8%

CROATIA

WENT THROUGH SOME KIND OF TRAINING



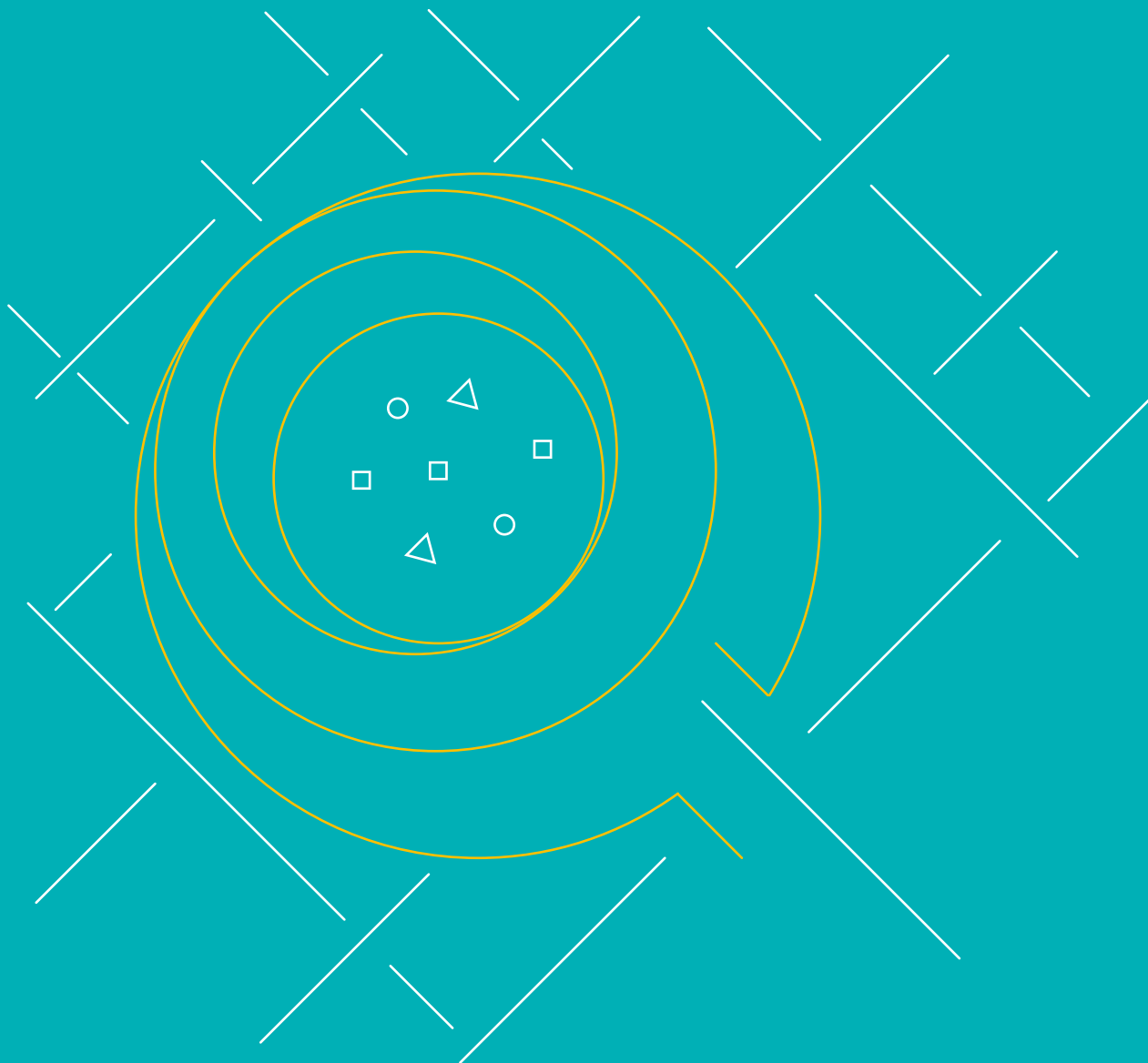
48%

HOW THEY DESCRIBE THEMSELVES

The surveyed media outlets also had space in which they were able to briefly, in their own words, describe themselves. This possibility was utilised by 20 respondents in Croatia and 34 in Serbia.

In Serbia, as many as 19 of them, apart from the most generalised professional goals (regular, timely and objective information on local topics), also cited some specificities, such as their intention to protect freedom of speech, help citizens to make important decisions, accelerate economic development, highlight environmental problems or youth problems, as well as to “raise the level of awareness of citizens”.

The majority of the surveyed media in Croatia substantially place themselves in covering “general topics”, while three portals emphasise their social engagement in the fields of human rights, democracy and similar areas.



VII

Local
Surroundings >

Average rating of the
importance of the topic:
Serbia: 4.21; rank – 5
Croatia: 3.00; rank – 9

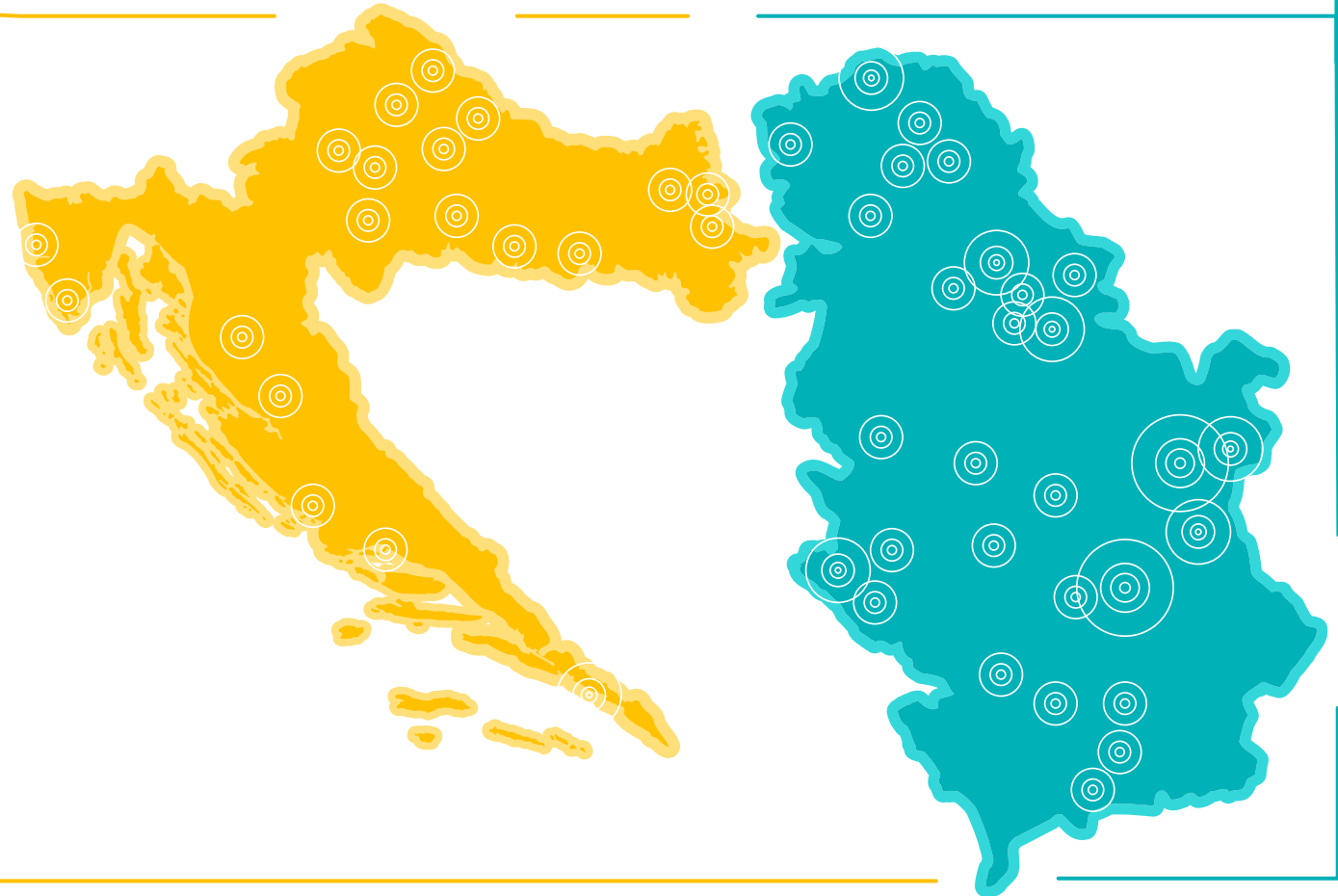


Serbia is divided into four statistical regions with approximately the same number of inhabitants. The share of responses by statistical region was as follows: Vojvodina 10, Serbia - East 17, Serbia - West 9 and the City of Belgrade 3. Serbia is divided into 27 administrative districts (7 of which are within the province of Vojvodina) and the City of Belgrade.

The low representation of Belgrade media among the responses is a result of the relatively small number of addresses to which questionnaires were sent (7). These are all of the local internet media outlets in Belgrade that we were able to identify, which is a reflection of the underdevelopment of the local media scene in the Serbian capital.

Croatia is divided into four statistical parts, which we assumed as having specific social and political suppositions for the work of internet media outlets. The

distribution of responses was: Slavonia and Northern Croatia (11 responses), Dalmatia (4 responses) Central Croatia (4 responses), Istra/Coastal Region/Kvarner (2 responses).



CITIES WHERE NEWSROOMS ARE LOCATED

Excluding Belgrade, four of the surveyed portals from Serbia are in regional centres, cities that have the status of district seats, but they gravitate more from other districts (3 from Niš and one from Novi Sad). These cities have 260,237 and 341,625 inhabitants respectively.

Other district seats host 18 of the surveyed media from a total of 13 cities (from 44,419 to 141,554 inhabitants).

One portal is from Novi Pazar, a major town (100,410 inhabitants), which is the seat of its district, while 13 media outlets are from smaller towns (from 16,638 to 37,551 inhabitants).

Twelve of the media outlets in Croatia that provided answers to the questionnaire are located in county capitals or in Zagreb (Croatia is territorially organised into 20 counties + the City of Zagreb). They are home to be-

tween around a million inhabitants (Zagreb and Zagreb County) and 24,195 inhabitants. The remaining nine surveyed media outlets are active beyond the county centres, in towns and municipalities with a population of between 16,696 and 4,354.

TERRITORY COVERED

Only 15 of the surveyed media outlets from Serbia indicated that they report exclusively on events from the territory of their municipality/city (the smallest is the municipality of Nova Varoš, with 16,638 inhabitants, and the largest is the City of Niš).

Two local Belgrade media report only on events relevant to the urban municipality (city area) that they cover (Zemun - 168,170 inhabitants, and Grocka - 83,398).

Two specific media outlets are from Bečej and Novi Bečej, two that are located administratively in two different districts, but which are separated geographically by only

the River Tisza. Both media state that they report from both towns (total of 61,256 inhabitants).

Apart from them, another 12 of the surveyed media outlets report from the territory of several municipalities/cities. In their reporting areas live from 80,830 to 320,988 inhabitants.

A special case among them is represented by two media portals from Priboj, a border town in southwest Serbia, which – apart from the territory of three municipalities of the Zlatibor District – also report from the municipality of Rudo in Bosnia-Herzegovina.

In the case of six media outlets, the reporting area consists of the territories of two to five counties (243,815 to 935,937 inhabitants). The largest area is covered by *Južne vesti* from Niš.



Two national minority media mainly address members of their national group in a particular area: Slovaks in Vojvodina (50,351) and Roma in Belgrade, Šumadija and the Braničevo district (34,049), and they have defined the area of their coverage as such.

In Croatia, five portals are thematically focused on the territory of their cities or municipalities; nine of them cover a wider regional area (15 to 40,000 inhabitants), though they do not cover the entire county; four cover counties, which include from 122,870 inhabitants (Dubrovnik), to 172,000 inhabitants (Sisak), to around a million residents (Zagreb and Zagreb County); while two, in addition to a regional component, also have an emphasized “broader” component. The only minority portal that responded to the survey was Romski Portal, which operates in Slavonski Brod, in the Croatian language. In addition to local news, it also publishes news from other areas (including the wider world) that is important to the Roma community.

COMPETITION

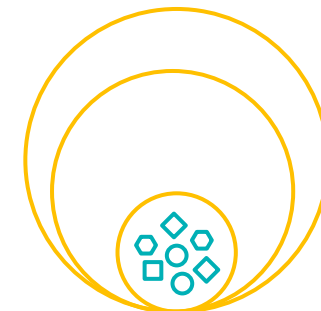
Respondents to the online survey were also posed three questions on the number of online, electronic (radio, TV) and print media in their city, according to their knowledge. From the answers provided, it can be concluded that local and online media in Croatia and Serbia work in a highly competitive environment.

In Serbia, five media outlets state that they are the only online media in their city, while seven of them state that another informative site operates besides them. The others are exposed to direct competition from three to nine online media outlets, while one respondent states that in their city (Niš) there are a total of 20 informative sites.

This forces internet media portals to clearly profile themselves on such a small area. At *Media Centar Bor* they state that they are trying to use expert texts to entice a different audience.

“Boro30 is a portal for young people, which follows nightlife events. Ist Media opts for agency news and shorter information. Each has its own audience”

(Zvonko Damnjanović, chief editor of this media outlet, explaining the situation on the local internet media scene.)



When asked about the number of electronic (broadcast) media outlets, in 37 responses it is stated that local radio and/or television exist in their city. When it comes to print media, their existence in host towns is confirmed by 28 respondents.

From the answers of respondents in Croatia it is shown that in their city there is an average of 4.6 online media outlets. The situation is least developed in Kneževi Vinogradi (1), while the respondent from Ivanić Grad states that in their city there are a total of 10 online media outlets.

The average number of electronic (broadcast) media in the cities of the surveyed portals is 2.56, where the most are in Dubrovnik (7) and Rijeka (6), and 1.35 print media outlets. The most unfavourable situation is in Otočac and Kneževi Vinogradi, where there are no local print media outlets.



PAPER IS A RELIC OF THE PAST

“The inhabitants of Osijek rely in their informing more on the internet than on other local electronic media, while paper is a relic of the past.”

(Mihael Šilac, editor and owner of the portal *Osijek News*, Osijek, Croatia)

“”

ISSUES OF INTEREST TO THE PUBLIC ON THE TERRITORY COVERED

Asked to describe in their own words the most important issues of public interest in the territory covered, respondents most frequently mentioned the following topics:

Serbia

1. Transparency in the work of the local authorities and the responsibility of public officials (mentioned in 13 responses, including several who placed an emphasis on the themes of “corruption” and “budget funds”);
2. Development of the local economy (10);
3. The status of national minorities and other minority, vulnerable and marginalised groups (10);
4. Unemployment (6);
5. Ecology and environmental protection (5).

Croatia

1. Issues related to the development of democratic standards at the local level (from human rights in general, via the transparency of the authorities, to individual rights of national minorities and the inclusion of young people) (7)
2. Local political issues (6)
3. Utilities topics (6)
4. Culture (5)
5. Development of the local economy (3)

PROBLEMS OF THE MEDIA RELATED TO THEIR LOCAL SURROUNDINGS

Media outlets were permitted in slightly broader responses, in their own words, to define the problems they face, and which are related to the local environment in which they work. Their responses, however, are quite similar.

A poor financial situation is stated as the biggest problem associated with the local area by 19 respondents in Serbia. Among these, three state the cause as being the small number and financial weakness of local advertisers, as well as their lack of understanding of the significance of the online sphere.

As many as eight of these media outlets highlight the allocation of money for the media from local government budgets as being the biggest problem. They most commonly have objections to the composition of the Competition Commission, a lack of respect for regulations, but also legislation itself. When responses to this question from the

Croatian media are analysed, we most often, in 12 cases, find a variation on “financing” (incentives, grants, subsidies, material assistance etc.). The surveyed media outlets in Croatia expect a solution to this problem from the local community.

A lack of appropriate staff in their city, primarily journalists, but also technical and administrative personnel, is noted by seven respondents in Serbia.

Footnotes 1:

All data on the population in municipalities/towns in Serbia is listed according to the 2011 Census

(<http://pod2.stat.gov.rs/ObjavljenePublikacije/Popis2011/Nacionalna%20pripadnost-Ethnicity.pdf>)

CLOSED NATURE OF INSTITUTIONS



The closed nature of local institutions for the media, and the inability to access information of public importance in their city, is a problem for three respondents in Croatia and six in Serbia. After a lack of money and staff shortfalls, the closed nature of institutions is the third biggest challenge in content production in the media in Serbia. How this looks in practice is described by Natalija Jakovljević Ivanić from the site *Magločistač* (Subotica, Serbia):


“Here it’s not popular to send requests for information of public importance. I was the first to send such a request, so they were amazed. When I send a regular email, the institutions do not respond, and when I send a request, they ask why I don’t send an ordinary question. When we receive answers, they are often vague and incomplete.”



VIII

Data on
Employees
and Associates >

Average rating of the
importance of the topic:
Serbia: 4.44; rank – 2
Croatia: 3.24; rank – 6



In responses to questions concerning employees and correspondents/associates in their media outlets, respondents most commonly emphasised the need for different types of free training or mentoring support, primarily journalistic, a lack of adequate staff and an inability to pay them adequately for their work.

Taking into account all types of jobs, in the surveyed media in Serbia an average of 5.36 persons are permanently engaged. Likewise, none of the surveyed portals in Croatia has more than 5 to 6 constantly engaged associates.


EXPERIENCE OF CHIEF EDITORS

Chief editors of surveyed portals in Croatia say that they have an average of 24.6 years of total journalistic experience. Chief editors in Serbia have significantly less experience, declaring their average journalistic and editorial experience of 15 years.

Of the 38 editors in Serbia who responded to this question, 13 have more than 20 years of experience. In contrast, five of them have less than five years of experience (see box). Chief editors in Croatia have an average of 10.7 years of experience in editorial affairs. One of them states that he has as much as 60 years of editorial experience, while another states that he has not completed a single year in the position of editor. The average editorial experience of chief editors in Serbia is 6.7 years. Seven of them have dealt with media editing for more than 10 years.

The total experience of interviewed chief editors in journalistic and editorial work in online media is an average of 5.3 years in Serbia and 7.7 years in Croatia.

EDITORS WITHOUT EXPERIENCE DO NOT THINK THAT THEY NEED ASSISTANCE



Seven portals in Croatia and five in Serbia state that the total number of years of journalistic experience of their chief editors corresponds to the length of their experience in online media, as well as their total number of years engaged in editorial work. From this we can conclude that editors of these portals started acquiring their journalistic experience in the position of editors of internet portals.

Despite this fact, the need for editorial training in both Croatia and Serbia received the second lowest average rating among all types of training offered in the survey - 3.71 and 3.95.

STRUCTURE OF PERMANENTLY ENGAGED JOURNALISTS

Portals in Croatia have an average of 2.43 employees or permanently employed journalists/editors. The average number of permanently engaged journalists and editors in Serbia is 3.13 per media outlet (whether employees, permanent freelance correspondents or voluntary workers).

Among the Croatian portals, six (29%) function as a “one-man band”, while two of those interviewed claim that no one is continuously engaged in their portal. In Serbia, eight media outlets (20%) indicated that, apart from the chief editor, there is no other editor or journalist, while 11 of them stated that, alongside the chief editor, one other journalist is employed. Only three of the surveyed sites in Serbia have more than five editors and journalists.

Among employees and constantly engaged journalists and editors on portals in Croatia,

25 of them are under the age of 30 (average of 1.19 per media outlet or 49% of the total number), and 24 (average of 1.14 per media outlet or 48%) are older than 45, which means that there are almost none between the ages of 30 and 45.

On average in Serbia, 1.3 journalists per surveyed media are under the age of 30 (40%), and 1.5 are older than 45 (48%). However, when we exclude from the calculation the editorial department of the site of the Slovak national minority, *Hlas l'udu*, where 13 of the 15 employees are over 45 and none are under 30, it follows that editorial sections have an average of 2.82 of journalists and editors, that those under the age of 30 are an average of 1.33 (46%) and older than 45 are 1.19 (41%). When it comes to experience, an average of 1.07 journalists and editors at the surveyed media outlets in Serbia have been engaged in journalism for less than five years, while 1.31 have been dealing with it for longer than 15 years. Again, if we exclude *Hlas l'udu*, the av-

erage number of journalists and editors with experience exceeding 15 years is precisely 1.

In Croatia, an average of 1.67 journalists and editors at the surveyed media outlets have less than five years of journalistic experience, while 1.1 have more than 15 years of experience.

TRAINING

Respondents estimated in the following way the needs of their editorial departments for training in specific journalistic skills:

Journalistic skills	SERBIA	CROATIA
Investigative journalism	4.38	4.09
Analytical Journalism	4.21	3.71
Digital Journalism	4.15	4.00
Media ethics	3.90	3.57



In addition to this, five respondents from Serbia emphasised in their comments the need for training in video journalism, or the recording and editing of video material. The surveyed media outlets were also asked to assess the need for training related to some specific areas of reporting:

Areas of reporting	SERBIA	CROATIA
Political and legal system	4.13	3.19
Economics	3.92	3.04
Crime	3.69	3.04
Communal problems	3.64	2.95

It should be noted that in chapter **XII Content production**, when they were asked to assess the most significant challenges in the production of content, respondents in Serbia placed a lack of training of journalists, whether professional or technical, at the bottom of the list of problems, while at the top we find a lack of money and lack of co-workers.

OTHER STAFF

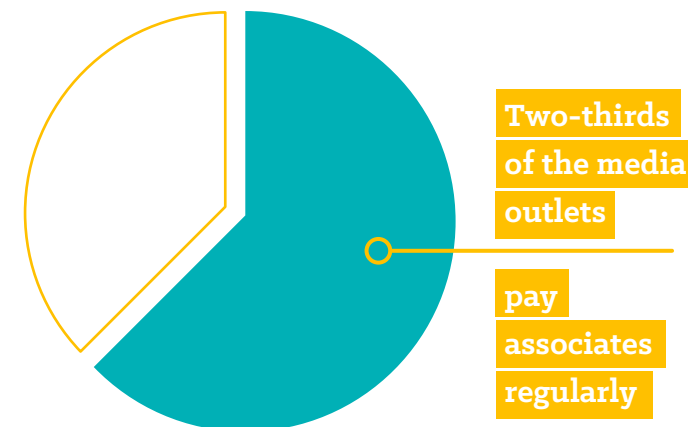
When it comes to other creative staff (photographers, designers, illustrators, etc.), the surveyed media outlets in Serbia permanently engage an average of 1.23 such persons. The average number of such permanently engaged associates in Croatia is 1.47, with eight of the surveyed media outlets (38%) stating that they did not establish that type of permanent cooperation.

When it comes to technical, administrative and other support staff, in Serbia an average of one person is permanently engaged per media outlet, while in Croatia that average is 1.1.

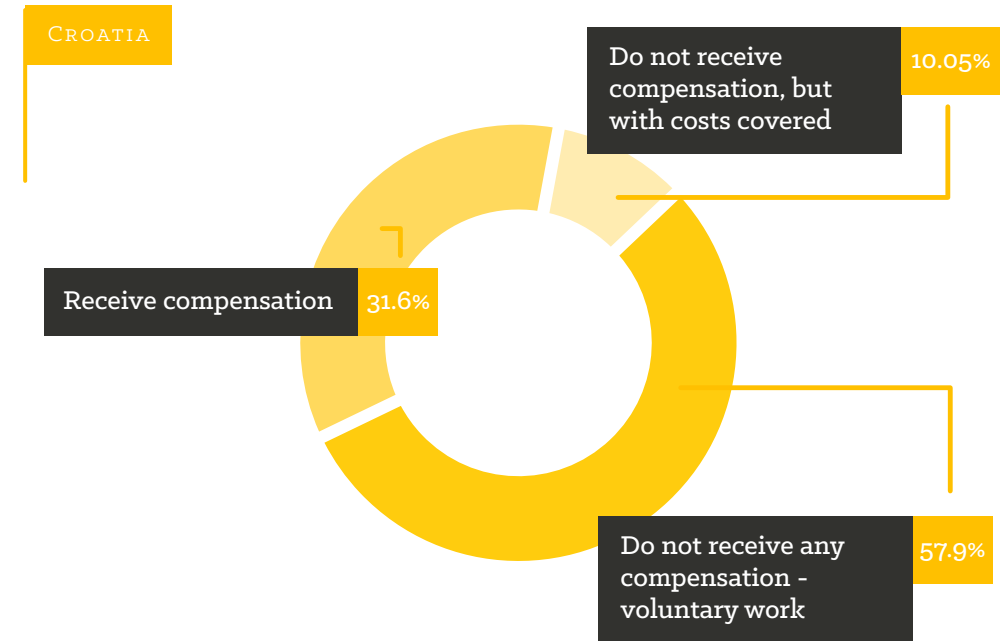
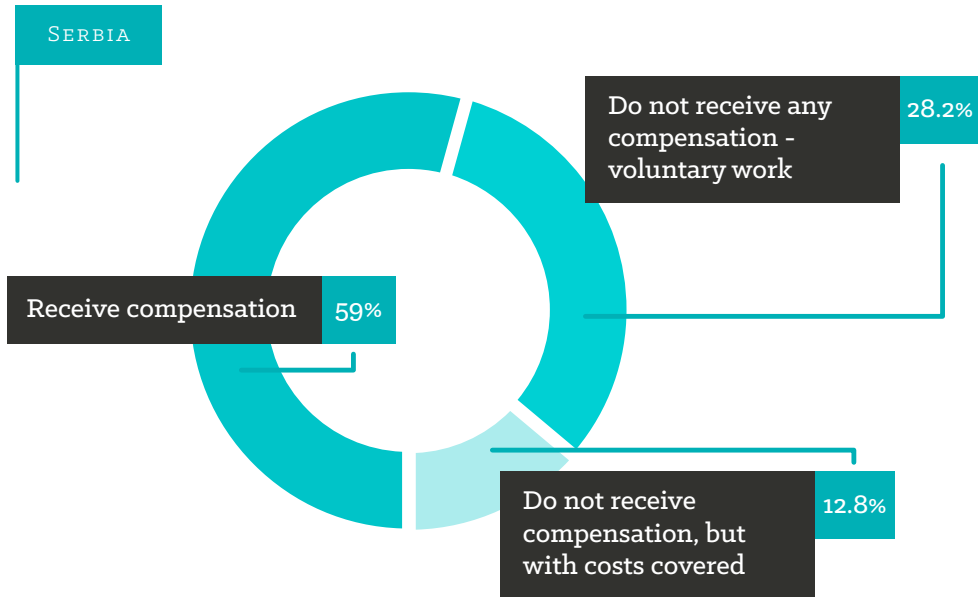


FEES

Two-thirds of the media outlets in both Croatia and Serbia stated that remuneration for the work of permanently engaged associates is paid regularly (66.7% in Serbia, 73.7% Croatia), while for others that is not the case.



FEES (CONTINUED)



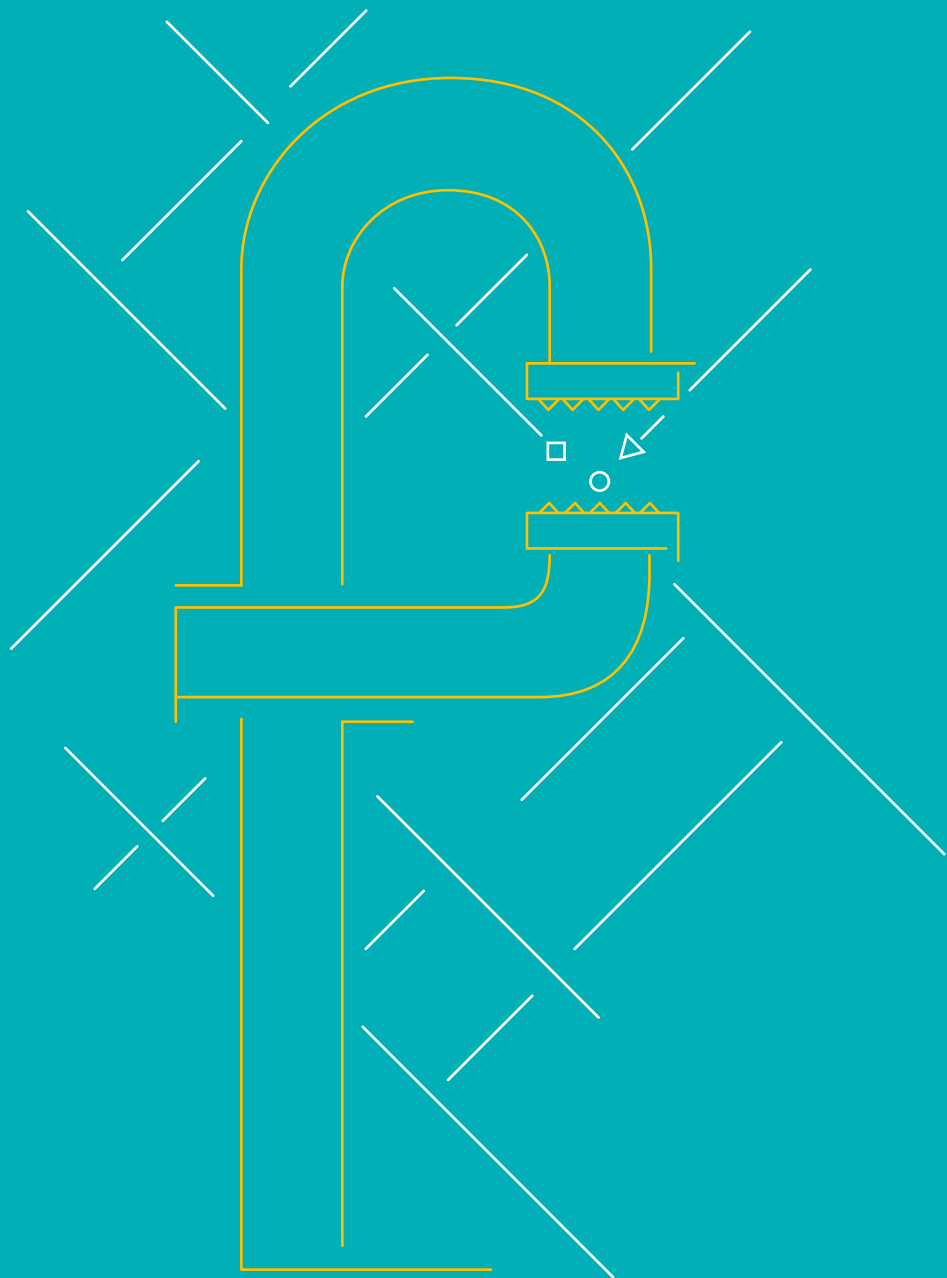
OCCASIONAL REMUNERATION

“Permanent associates volunteer, but also occasionally receive remuneration when money is available. Three young associates have more than five years of service, as they have been there since high school. On the whole,

the motive for volunteers is to gain work experience.”

(Zvonko Damnjanović, chief editor of Media Centre Bor, Serbia)





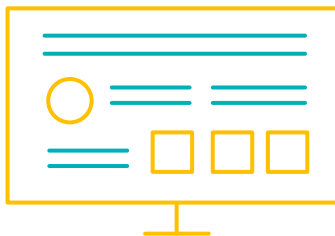
Technical Data
on Website >

Average rating of the
importance of the topic:
Serbia: 4.56; rank – 1
Croatia: 3.33; rank – 4

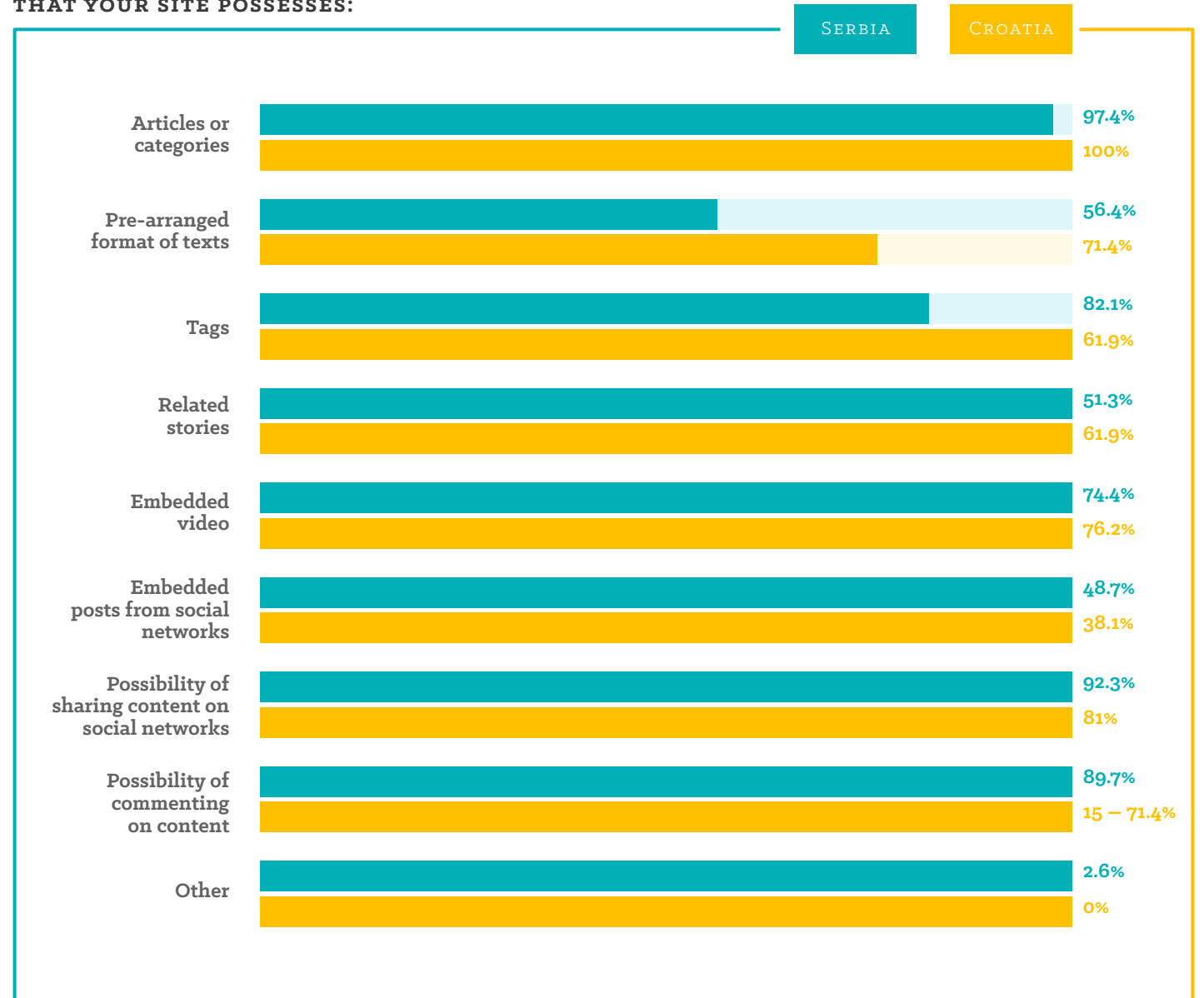
CMS

As is to be expected, the internet media in our sample, both from Croatia and Serbia, most commonly use CMS WordPress (Croatia – 11 or 52.4%, Serbia – 24 or 61.5%). The second most represented is Joomla (Croatia – 19%, Serbia – 15.4%). Five sites in each country (Croatia – 23.8%, Serbia – 15.4%) use a CMS designed solely for their needs.

Among the four sites in Serbia that use some of the other “pre-built” CMS’s, it is interesting to note the *Kolubarske* site from Valjevo which uses free CMS Newscoop, developed specifically for the needs of news websites.



SELECT THE FUNCTIONALITY THAT YOUR SITE POSSESSES:

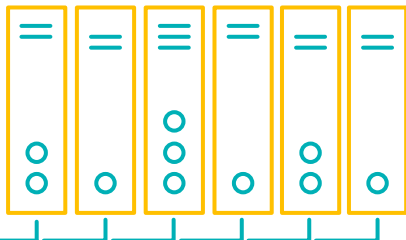


HOSTING

Almost two-fifths of respondents in Serbia (39.5%) host their sites with foreign hosting providers. The most common is Sweden's Loopia (6 sites), via its local representative in Serbia. Belgrade providers' sites are hosted by 12 media (the most common is DreamWeb from Belgrade), while the rest chose local hosting providers.

Among providers of hosting services in Croatia, the most common is Avalon from Đurđevac (4 portals or 20%).

The average annual cost of hosting is 200 euros in Croatia and 183 euros in Serbia, where the most is paid by *Južne vesti* (Niš, Serbia), which state that they have a Managed Virtual Private Server and it costs them \$1,500 annually.



Internet media in Serbia expressed a high degree of satisfaction with their hosting providers, giving them an average rating of 4.51. However, six of the surveyed media in Serbia say that from a technical aspect they are most in need of “better and stronger” hosting. In Croatia, the average satisfaction rating for hosting is actually slightly lower – 4.23.

POSTING CONTENT

Content on site is posted almost exclusively by editors and journalists (in 95.3% of cases in Croatia, 92.3% in Serbia), while only one media in Croatia and three in Serbia (4.8% and 7.7%) state that this is done by a webmaster.

When it comes to choosing and preparing photo and video content, in Croatia that is done significantly more often by specialised persons (19% of cases) than in Serbia (5.3%). Outgoing links are a rarity on the internet media in Serbia and Croatia. Respondents usually state that they do not have such links at all, or that they have a maximum of

one per post, and that is mostly a link to the original site when it comes to republished content. Only some media state that they have an average of two to three links per published post.

USER EXPERIENCE

Five respondents from Serbia and two from Croatia state that their users' most common complaints in a technical sense are that the site is slow to work or has a small load speed.

Five of the surveyed media from Serbia and three from Croatia say that users most frequently mention bad site displays on mobile devices, or the inability of the screen to adjust to different resolutions. Most of the media outlets that answered this question (Croatia 15 or 75%; Serbia 32 or 84.2%) stated that their website is tailored to display different resolutions on screen.

One site in Serbia states that the most signif-

icant remark of users was the poor functioning of their android applications, while one notes a lack of iOS apps (they already have an android app).

In Croatia, eight sites (42.1%) indicated that they have a mobile application, while of the 11 respondents who do not have one, less than half (5) say that they plan to develop one.

In Serbia, 15 of the surveyed media have an app (38.5%). However, most of those that do not have one state that they plan its development (17 of 24 sites). Among the comments, two sites indicate that they require help with this task.



ANALYTICS

While all respondents say that they use some analytical tools to track the flow of users' movements, and Google Analytics is most often cited (82.1% in Serbia and 65% in Croatia), the question is how deep they delve into analytical results.

Thus Saša Trifunović, chief editor of the site *Ist Media* (Bor, Serbia), states that he monitors analytics on Facebook much more because he finds Google Analytics too complicated for certain categories. His fellow citizen of Bor, Zvonko Damjanović (*Media Centar Bor*), however, says that when they see a topic is read "they add another text if they have the material".

In Croatia they relatively frequently use tools within their own CMS (20%), while one portal (Internet radio) says that it does not use any tools for analytics.

MAINTENANCE AND DEVELOPMENT

In 29% of cases in Croatia and 31% in Serbia, technical maintenance is handled by a competent person who is employed or engaged permanently by the publisher. In Croatia 24% of respondents, and in Serbia 26%, say that they do not have professional assistance and that they fend for themselves, while in 47% of cases in Croatia and 43% in Serbia they engage external experts.

A special staff member in charge of site development is engaged by 23 of the surveyed sites in Serbia (60.5%) and 12 (63.2%) in Croatia. Some 27 of them (69.2%) in Serbia and 13 (65%) in Croatia have a technical development plan.

In contacts with three of the surveyed media in Croatia that responded by stating that they have a development plan, we found that in two cases there is no existing written plan with precisely determined obligations and deadlines, nor a cost estimate.

Media Centar Bor (Bor, Serbia) states that it does not have a development plan because that depends on finances. For the same reason it is not developing a mobile application, even though it is a computer centre. Almost all of the surveyed media have features or categories (in Croatia 100%) and the possibility of sharing content on social networks. The fewest of them in both countries have the possibility of embedding posts from social networks (Croatia – 38.1%; Serbia – 48.7%) and displaying related stories (Croatia – 61.9%; Serbia – 51.3%).

There is a striking difference in the prevalence of the opportunity for users to comment on content. Some 89.7% of those surveyed in Serbia provide this possibility, while in Croatia only 71.4% do so.

More than half of them (57.9% in Serbia and 55.6% in Croatia) confirm that they plan to introduce new functionality in the near future, while answers are very different when it comes to the question of which kind.

Six respondents from Serbia (and only one from Croatia) note in their comments that they need programming assistance to develop their site, while three (Croatia – 1) state that they need a web designer.

Seven of the surveyed media in Serbia and one in Croatia see the most significant assistance in this area in free training or consultancy support.

SOFTWARE COMPANIES AS PUBLISHERS

During in-depth interviews in both countries it was found that in many cases the founders of internet media are professional programmers and software companies, which greatly reduces the need for external technical assistance and enables continuous development.

Thus the publisher of *Osijek News* (Osijek, Croatia) is programming company *Moja Akcija*. In Serbia, at *Media Centar Bor*, they state that the activities of their publisher, Computer Centre Bor, include the production of sites for third parties.

Draženko Požarić, editor and owner of portal *Parentium* (Poreč, Croatia), completed the

Faculty of Electrical Engineering and is the creator of his own CMS:

“All of my own ideas I can technically implement myself and I very often change the program and design.”

Čedo Živković, owner of the site *Zlatar Info* (Nova Varoš, Serbia), who is also an electrical engineer, states that the site was created as his degree dissertation work.





Internet Security >

Average rating of the
importance of the topic:
Serbia: 3.95; rank – 9
Croatia: 3.19; rank – 7/8



In Serbia, 18 of the surveyed sites (46.2%) had been victims of some form of attack from the internet. Five respondents specified that these had been DDOS attacks, while two cited website defacement attacks. In Croatia, nine had been exposed to some form of attack (43%), one of which specified that it was a case of “SQL inject” attacks.

From the responses of local portals in Croatia, it can be concluded on the whole that this kind of threat to their security does not represent a serious threat and that they are technically mature enough to protect themselves.

Several of the surveyed sites in Serbia (5) state that they were attacked by “Albanian hackers”, but did not specify what kind of attacks these were, except in one case when website defacement was mentioned. Attacks from Russia and Ukraine were also mentioned among the responses.

FREQUENCY

Only a few respondents specified when and how often these attacks took place. Judging by their responses, hacker attacks on local internet media are a one-off occurrence, or they occur several times over the course of a few years. In Croatia, the response to the question on the frequency of attacks varies from “three times in twelve years” to “up to ten times a month”.

ROLE OF HOSTING PROVIDER

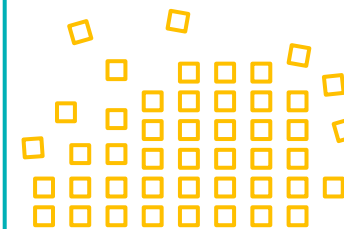
Media Centar Bor (Bor, Serbia) disabled comments on the site a year ago, as they received a large number of DDOS attacks from Russia and Kosovo.

“We had 100, 200 such emails per day, but since comments were disabled that has reduced. The hosting provider therefore received a rating of 4,” explains chief editor Zvonko Damnjanović.

At the *Grad Subotica* site (Subotica, Serbia) they say that they left their Latvian service provider, which did not manage to cope with attacks coming from Ukraine, and switched to German Alotech.

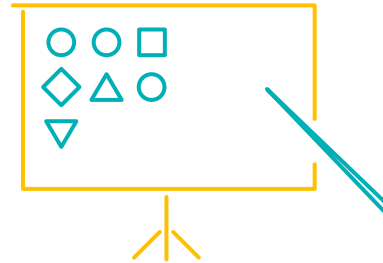
ROLE OF STATE BODIES

Only one attacked site in Serbia has ever reported this incident to the police, and even that one never received any feedback information regarding the results of the investigation. Of the nine portals in Croatia that are considered to have been subjected to attacks, five reported such attacks to the police, but they also did not receive any kind of feedback on the results of the investigation.



TRAINING

In Serbia, 21 media outlets (53.8%) and 10 in Croatia (48%) state that someone from their team went through some kind of training in the field of internet security.



SERBIA

WENT THROUGH SOME KIND OF TRAINING

53.8%

CROATIA

WENT THROUGH SOME KIND OF TRAINING

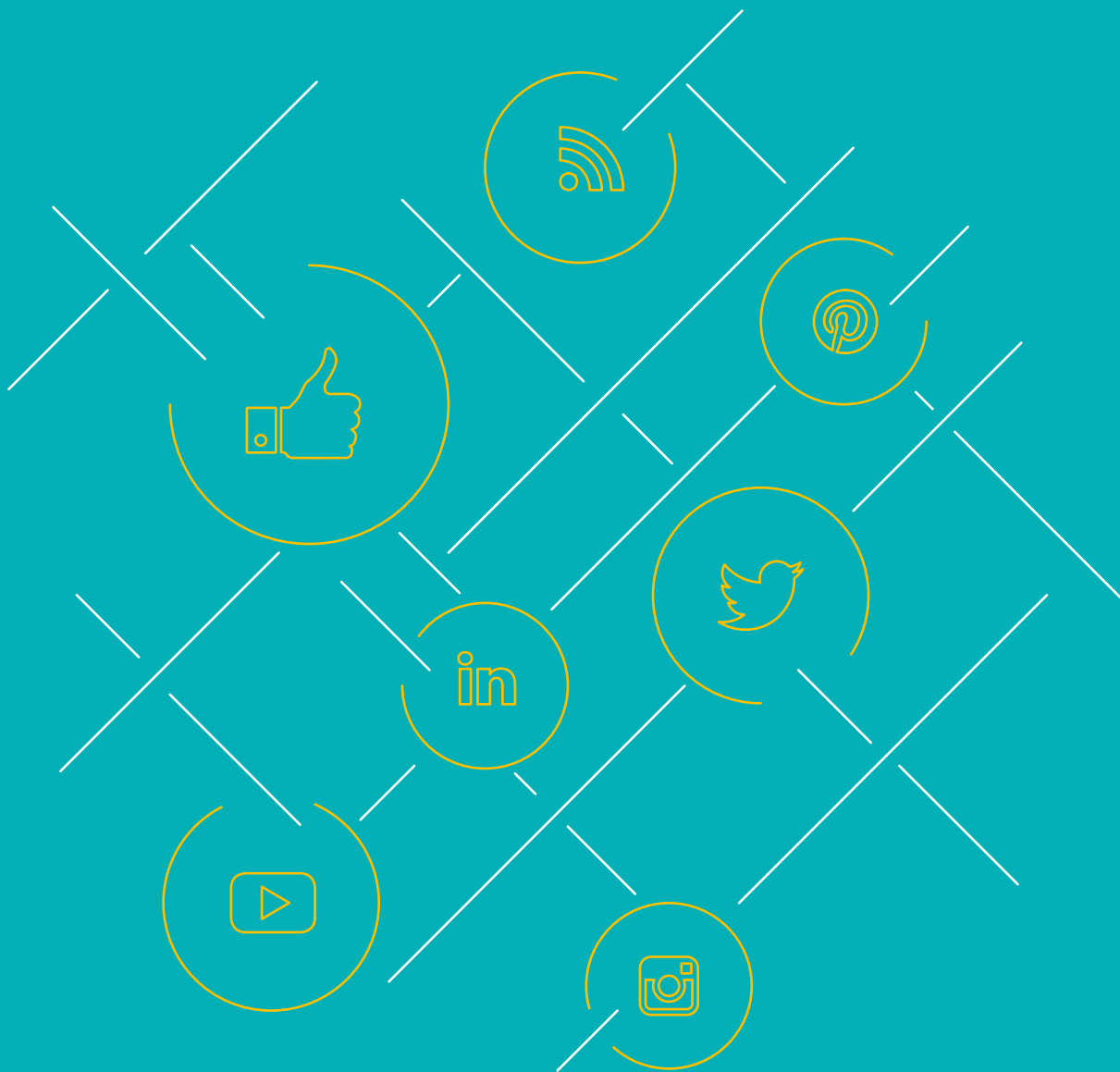
48%

OVERLY ADVANCED TRAINING



Saša Trifunović, chief editor of the site *Ist Media* (Bor, Serbia) said that he had gone through training given by an expert NGO, but that it was too advanced for his level of expertise.

“That’s why I am now unable to apply this knowledge. But I sometimes hear useful things from programmer friends,” says Trifunović.



XI

Social Networks >

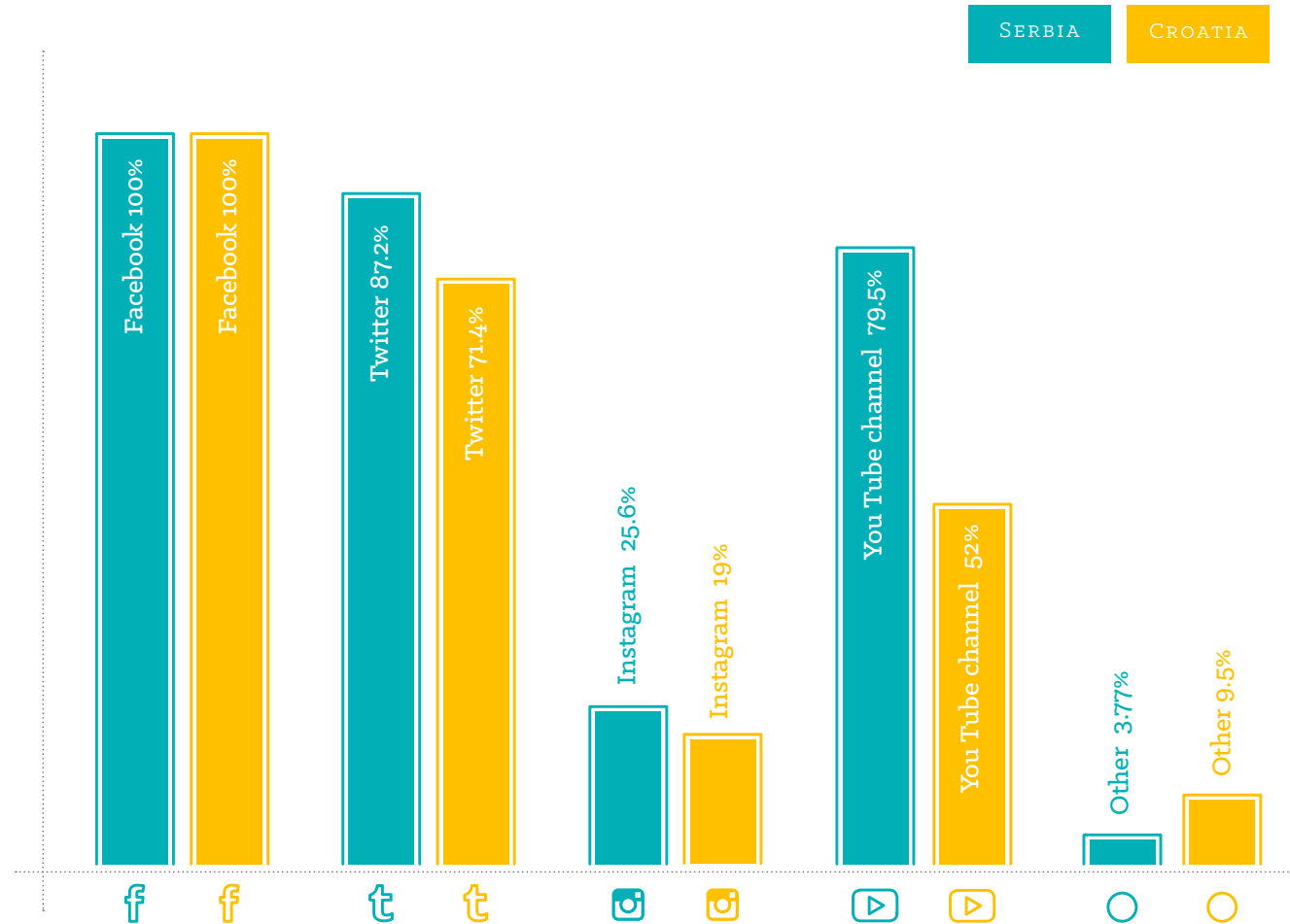
Average rating of the
importance of the topic:
Serbia: 3.97; rank – 8
Croatia: 3.38; rank –3

All the surveyed media outlets in Croatia and Serbia have their own Facebook page. The second most common network is Twitter, on which 15 portals in Croatia (71%) and 34 (87%) in Serbia have an account.

In third place is YouTube, where channels are held by 11 portals in Croatia (52%) and 31 (80%) in Serbia. Instagram accounts are slightly less common (19% in Croatia, 26% in Serbia), while Google+ is used by only two surveyed media outlets in Serbia and one in Croatia. One surveyed media outlet in Croatia also uses Flickr.



DOES YOUR MEDIA HAVE AN ACCOUNT ON SOCIAL NETWORKS AND, IF SO, WHICH?



FACEBOOK

Facebook pages of local internet media in Serbia have an average of 9,145 likes (maximum of 137,000, minimum of 209). According to respondents, media publish an average of 6.54 posts per day on their FB pages.

The average number of FB likes of surveyed portals in Croatia was 11,848 (maximum of 37,000, minimum of 364). Portals publish an average of 10.5 articles per day on Facebook.

TWITTER

Twitter accounts of the surveyed media in Serbia are followed by an average of 805 people (maximum of 9,962, minimum of 22). The average daily number of posts on this network is almost the same – 6.5.



The number of Twitter followers of surveyed portals in Croatia averaged 438. Portals who declared that they use Twitter publish an average of 7.2 articles per day on this network.

YOUTUBE

The surveyed media outlets have an average of 326 followers each on YouTube (maximum of 2,000, minimum of 5). They publish an average of 3.54 video clips per week.

On their YouTube channels the surveyed Croatian media outlets have an average of 506 followers and they publish 0.78 video clips per week.



COMBINED APPROACH

“Our Facebook and Twitter accounts are linked. We publish the most from the page of Zlatar Info, but we also have a Zlatar fest page, where we publish news related to tourism and the local summer festival. We sometimes also share from our personal profiles, but rarely, when we think that would interest people. There is also a closed FB group, where local boys from Nova Varoš lead discussions, and I post there more.”

(Čedo Živković, Zlatar info,
Nova Varoš, Serbia)



PAID PROMOTIONS

A far higher percentage of media in Croatia pay for promotions on social networks (67% of them) than in Serbia (20.5%).

Only four portals in Croatia responded to the question of how much money they set aside for that purpose, and among them the average is 130 euros.

The average monthly amount spent for this purpose in Serbia is highest at *Južne vesti* from Niš (“100 to 350 euros, depending on the needs”), while amongst others the average is 19 euros per month. Four respondents note that they do not have money for this purpose.

Saša Trifunović (*Ist Media*, Bor, Serbia) said that they avoid busting political stories in order for it not to appear as though they are favouring someone.

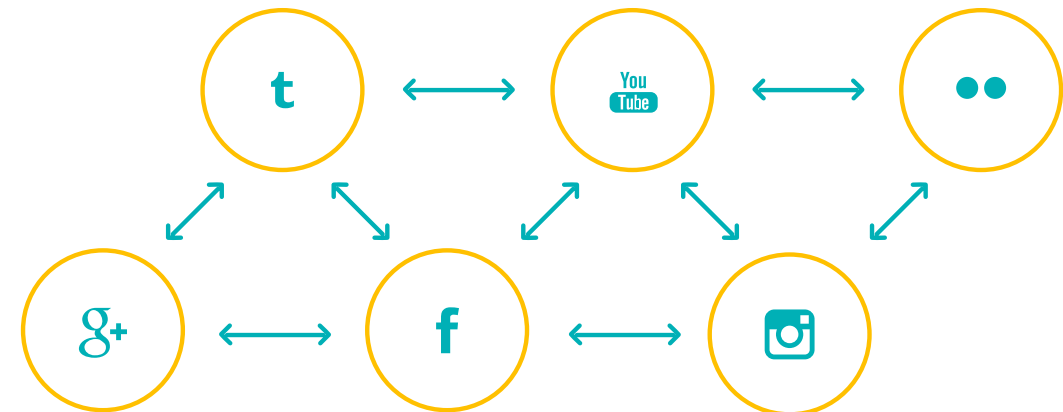
COMMUNITY MANAGEMENT

Content on social networks is most frequently posted by editors and journalists, in 54% of cases in Serbia, while in 36% of cases it is posted exclusively by editors. Only 7.7% of sites have a specific person responsible for community management.

The surveyed internet media in Croatia do not have community managers. Content is posted on social networks by “editors” in 47.6% of cases. In 42.9% of cases it is done by “editors and journalists”, while in the remaining 9.5% of cases by “journalists” only. Moderation of comments on social networks is carried out by 52.6% of media outlets in Serbia and 67% in Croatia.

Saša Trifunović (Serbia) explains that they respond to FB comments if they are directly addressed and that they never delete comments on the site’s FB page.

Six of the surveyed media outlets in Serbia (15.4%) and one in Croatia state that they need a community manager. Eight of the surveyed media outlets in Serbia and two in Croatia say that their associates require training in this field.





XII

Content
Production >

Average rating of the
importance of the topic:
Serbia: 4.36; rank – 3
Croatia: 3.48; rank – 2



TARGET GROUP

Of the 34 media outlets in Serbia that responded to the question of which target group they address, 17 of them responded that they have no defined target audience, or that they target all citizens who live on the territory they cover or who are interested in news from that territory.

Among them were two minority media who noted that they target all members of their national community, but there were also those who defined age frames, albeit frames that are so broad as to actually include everyone (“age 16 to 75” or “from 7 to 77”). When we also take into account the five media outlets that did not answer this question, it turns out that 56% of the surveyed media outlets in Serbia have no clearly defined target groups. One of the respondents explained why this is so in their response, stating: “The population in our town that is interested in local issues and also uses the internet is too small to apply additional selection”.

Six of the 13 media outlets in Croatia that provided answers to this question defined their target group in the following general way: “Roma”, “All inhabitants of the region we cover”, “18+”. Seven of the surveyed media outlets spoke exclusively about the age of their readers, in which can be noted a preference towards a somewhat older audience than in Serbia (“middle-aged people”, “aged 30 and over”). Two media outlets combined the aforementioned criteria of age and place of residence with education (“educated”, “better educated”).

However, some media in Serbia responded with greater precision. On the whole, they cited only age frames (6), or the age of the target group in combination with education (4).



The most common is the general description “young”, but also among those that noted a specific intended audience the prevailing responses were that they address the population between the ages of 18 and 35. Only two media stand out in this aspect: one which wrote that the age range of its target audience is from the ages of 18 to 50, and a second which raised its lower age limit to 25.

Of the four media outlets in this group that also mentioned the level of education of their desired audience, three say that they target a medium and highly educated audience, while one limited itself to a college-educated population.

To this group should be added two media outlets that headed in the opposite direction and, thus, stated only what is shown by statistics about their audience. Both responded by stating that their visitors are usually aged between 18 and 45.



Five media outlets described their target group in a specific way. They address the following audiences:

- “The Roma community and decision-makers, but also partly the majority community”
- “Young people, women, nature lovers and environmental activists”
- “Civic-minded people”
- “The expert public, the NGO sector, the media public, students”
- “The target group includes those who are sick of tabloids and bad journalism”

REPORTING TOPICS

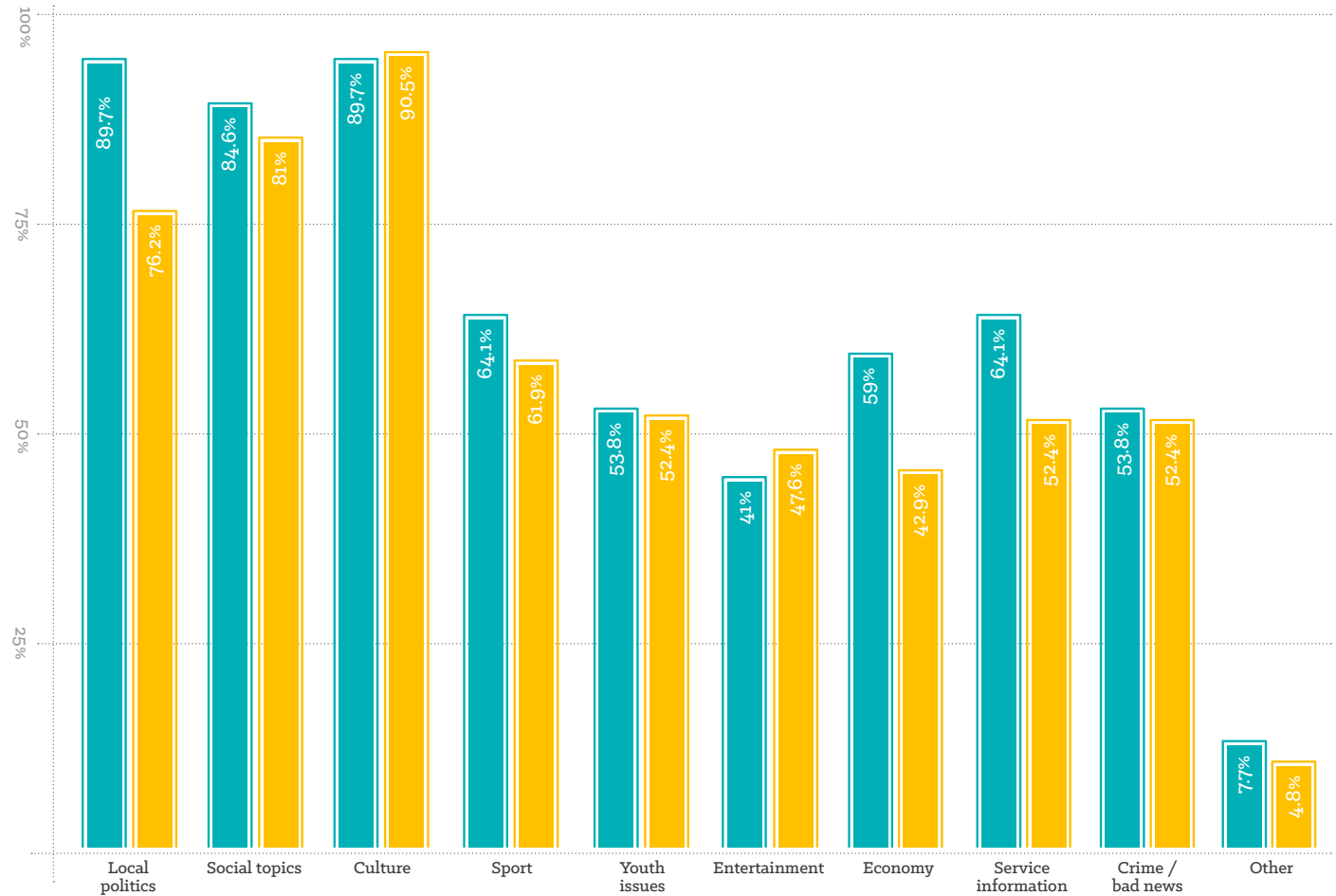
Almost all of the surveyed media outlets in both countries report on cultural events and local political and social issues, while among the least-represented topics are entertainment, youth problems and crime. However, in Croatia the least represented topic is the economy, which is in the middle of the table in Serbia (see Table 1)

WHICH TOPICS DO YOU DEAL WITH MOST OFTEN?

SERBIA

CROATIA

Table 1



Čedo Živković, chief editor of the site *Zlatar Info* (Nova Varoš, Serbia), says that in his small town there is not much crime, which is why they rarely cover this topic.

The frequency of certain topics in the letters of a small number of correspondents who also are often not paid, often depends on the interests and preferences of the journalists themselves. Thus, in the editorial section of the *Grad Subotica* site (Subotica, Serbia) they say that there are many potential topics in their city, but not in areas that interest them.

Project financing also impacts on the structure of topics, thus at *Media Centar Bor* (Bor, Serbia) they explain that some topics are covered only for the duration of a project they have received.

Nine portals in Croatia (44%) stated that they deal the most with 7 to 9 of the mentioned topics, while seven (34%) are reduced to four or fewer topics.

IMPROPER EDITING

As many as 65.8% of the surveyed media in Serbia (62% in Croatia) state that their texts are subjected to copy editing, but only 13.8% have professional proofreaders (10% in Croatia). This means that in both countries proofreading is performed by unskilled people for 52% of the media, while more than a third of the texts are not proofread at all. The problem is a lack of money to pay professionals, which is cited by even those of the surveyed media outlets that are financially the strongest.

Proofreading is usually done using the “four eyes” method, or the practice of journalists checking each other’s texts. Another popular tool is typing a dubious phrase or concept into an internet browser.

Some editors have professional friends who they occasionally call for assistance. At *Južne vesti* (Niš, Serbia) they explain that they asked the professor of grammar at the faculty in Niš and her students to analyse the accuracy of grammar in a sample of a hundred of their articles.



NUMBER OF NEWS ITEMS AND AUTHORS' CONTRIBUTIONS

The surveyed media in Serbia publish an average of 32 news items from their own production weekly (maximum of 120, minimum of 1). The average number of their own longer authors' texts or features (analysis, comments, reports) is six (maximum of 30, minimum of 0).

The surveyed portals in Croatia publish an average of about 40.5 news items from their own production per week (maximum of 200, minimum of 3), while the average number of longer authors' texts is slightly more than nine per week (maximum of 50, minimum of 0).

If these figures are correct, they indicate the heavy workload of journalists from local internet media, because one permanently engaged journalist/editor produces an average of 17 news items per week in Croatia and 10 in Serbia, as well as four longer authors' features in Croatia and two in Serbia.

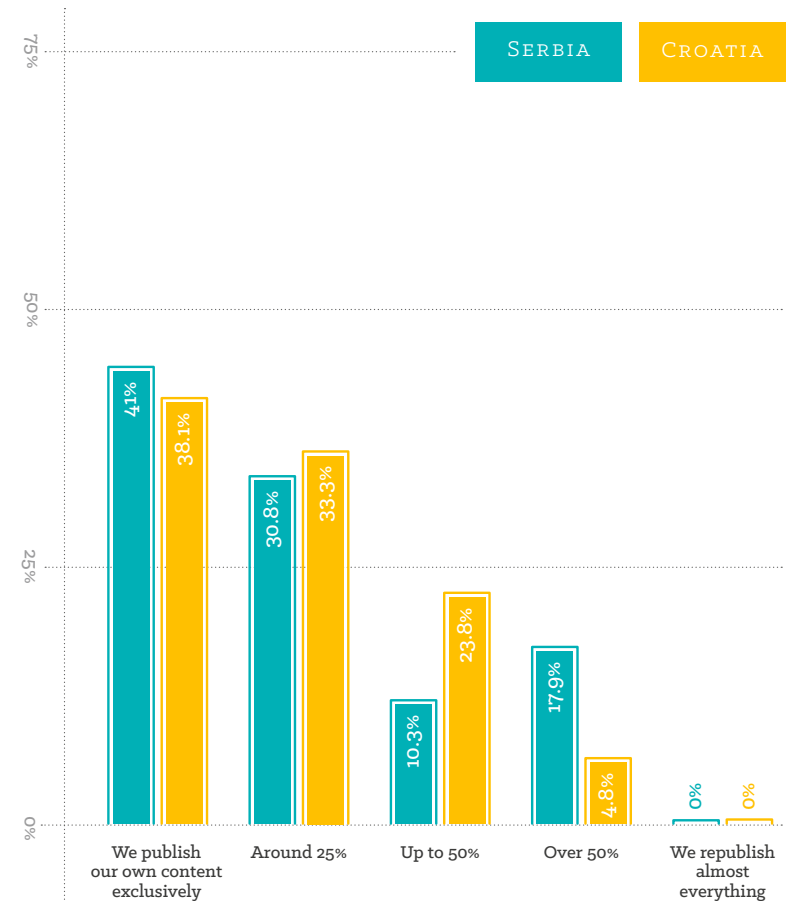
At *Media Centar Bor* (Bor, Serbia) they said that they publish a small number of articles because their contributors are mainly volunteers ("Only one journalist receives a salary, while one is a freelancer"), so they cannot force them to write.

"Of those two or three at a press conference, one writes and two don't, but rather just correct the text," laments Zvonko Damnjanović, chief editor of this site.

Media outlets in Croatia to a lesser extent republish articles published by other media outlets. Some 41% of the surveyed media in Serbia (38% in Croatia) exclusively publish content that they produce themselves, while 18% of them republish more than half of all content (4.8% in Croatia). (See Table 2)

WHAT PERCENTAGE OF ARTICLES/FEATURES THAT YOU PUBLISH ON YOUR SITE ARE TAKEN FROM OTHER SITES?

Table 2



MULTIMEDIA

When it comes to multimedia content, all of the surveyed media outlets have only photographs. Some 38% in Croatia and 33% in Serbia said that they only publish photos that they shoot themselves, while 38% in Croatia and 49% in Serbia said that the photos were “predominantly” theirs. In Croatia there are no media that exclusively reuse photographs belonging to others, while in Serbia there are three such media outlets (7.7%).

Video clips are published by all surveyed media in Croatia, while four sites in Serbia do not have them at all. In Croatia, 38% of the surveyed media always record their own video clips (51% in Serbia), and 15% each in both countries only publish videos recorded by others.

Audio recordings are the least represented. In Serbia as much as 36% of the media do not have them at all (4.8% in Croatia), while the same percentage record them for them-

selves (Croatia - 48%). Some 19% of the media in Croatia and 8% in Serbia only publish the audio recordings of others.

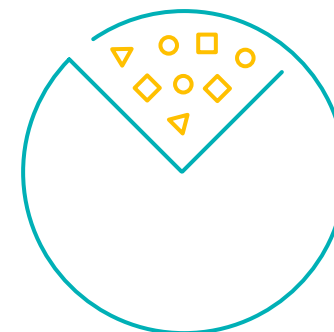
Graphics in Serbia are not published by 18% of surveyed sites (4.8% in Croatia), 28% of them publish only those specifically created for them (Croatia - 48%), while 8% only republish others' (Croatia - 14%).

Illustrations are not published by 15% of surveyed media outlets in Serbia (Croatian - 4.8%), 21% (Croatia - 19%) exclusively republish others', while 18% publish only those produced especially for them (38% in Croatia). As the most important need that concerns the production of content, 12 media outlets in Serbia and five in Croatia stress the lack of proper equipment for the production of multimedia content, while five respondents in Serbia and four in Croatia cite a lack of training for this type of production.

CHALLENGES

Surveyed media in both countries see a lack of money and a lack of staff as the biggest challenge in the production of content. As seen in **Chapter VIII Data on employees and associates**, our respondents explain a lack of sources of finance as being largely responsible for the lack of contributors.

Only then comes the problem of the attitude of local holders of political power towards media outlets, primarily through the closed nature of institutions in both countries, but in Serbia also through political pressure.



INSTITUTIONS AND BUSINESSES HIDE EVERYTHING



“It is not only that I cannot get to information, but rather I don’t even know what is happening. Official institutions, businesses and other entities hide everything from ‘certain’ media. That problem has a significant impact on the content and I have no way to resolve it.”

(Marko Čuljat, editor and owner of *Licke novine*, Gospić, Croatia)

The least important challenges are cited as the lack of training of associates, be that technical or professional, and ethical dilemmas. Copyright issues are at the very bottom of the list in Croatia.

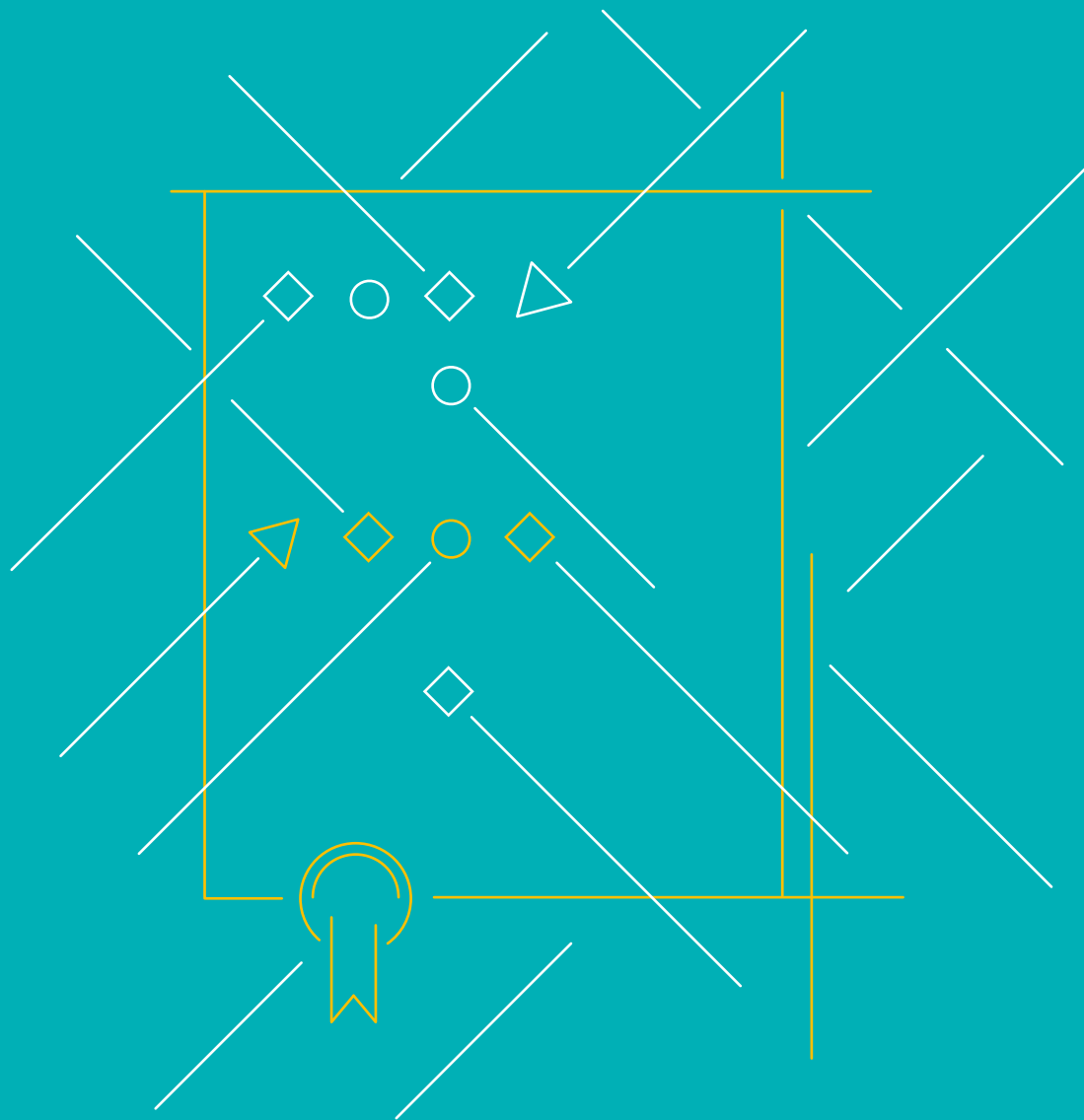
Challenges	SERBIA	CROATIA
Search for news	3.26	3.19
Content selection	3.05	2.71
Lack of training of journalists	2.72	2.48
Lack of technical training	2.59	2.48
Copyright issues	3.10	2.43
Ethical dilemmas	2.77	2.43
Political pressures	3.46	2.48
Lack of money	4.59	4.09
Lack of contributors	4.38	4.38
Closed nature of institutions	3.87	3.52

SHARING REPORTING STANDARDS



At *Južne vesti* they say that they drafted standards for news at the beginning of the year. They determined the appearance of leads, paragraphs and how proper names and numbers should be written.

“We established these standards on the basis of our own assessments, and they are general. We also sent our book of standards to the *Novi Bečej* portal,” says chief editor of *Južne vesti* Predrag Blagojević.



XIII

Copyright
Issues >

Average rating of the
importance of the topic:
Serbia: 4.18; rank - 6
Croatia: 2.90; rank -10



In the previous chapter we saw that the republishing of others' articles is relatively common among the surveyed media outlets in Serbia. Despite this, only one of the surveyed media in Serbia noted that it had once been sued for illegal use of someone else's content, but even in this case a conviction was not forthcoming.

At *Južne vesti* they complain that some institutions, like theaters, sometimes send photos as if they were owned by the theatre, only to be contacted by the photograph afterwards and learn that he is the owner.

"The worst of all is that they could sue us and win in court," says Predrag Blagojević, editor of *Južne vesti*.



In Croatia the situation is somewhat different, with five portals noting that they were sued for content that they republished (24%). One was also convicted for illegally republishing content.

NO ONE GOES AFTER "WILD" PORTALS STEALING CONTENT

"In Osijek there are a large number of unregistered, 'wild' portals, which appear and disappear with great dynamics, and their 'editorial policy' is based on the theft of content. We have never sued them, among other reasons because of the inertia of the judicial system."

(Mihael Šilac, *Osijek News*,
Osijek, Croatia)



Although the media outlets that participated in in-depth interviews often complained that their photographs were taken without being asked, the surveyed media stated that they themselves had never filed a lawsuit for copyright infringement.

Judging by the in-depth interviews, the reason for this situation is the existence of an agreement, express or implied, with friendly media outlets and local correspondents of national media.

Natalija Jakovljević Ivanić from the site *Magločistač* (Subotica, Serbia) said that, for example, she does not need to seek permission from the site *Autonomija* because they work with them and they have an agreement whereby permission does not need to be sought. And on the *Grad Subotica* website, from the same city, they say that they know most local journalists, so republishing content is not a problem.

RULES OF REPUBLISHING

Some 62% of surveyed media in Serbia and 82% in Croatia said that they have defined conditions for republishing content from their site.

Chief editor of the site *Ist Media* (Bor, Serbia), Saša Trifunović, explains that their rules on republishing are based on the model of *Južne vesti*:

“I consulted with Peđa Blagojević and we even gave a little more freedom than is given by *Južne vesti*. For instance, they have a limit of 150 characters, while I specified 350, since I realised that this represents two paragraphs –in one paragraph you cannot even introduce someone to a story.”



SERBIA

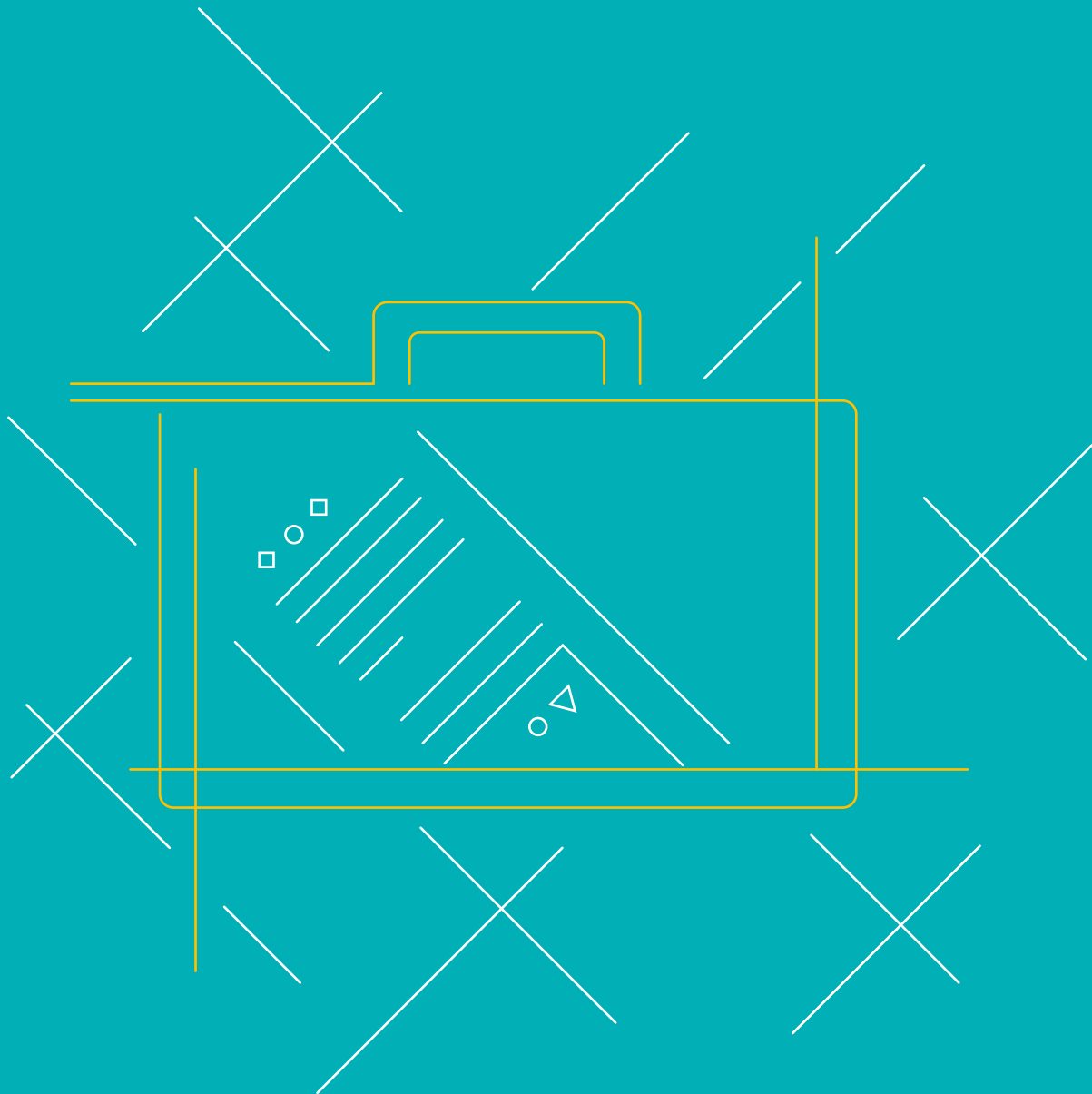
HAVE DEFINED CONDITIONS FOR REPUBLISHING CONTENT FROM THEIR SITE.

62%

CROATIA

HAVE DEFINED CONDITIONS FOR REPUBLISHING CONTENT FROM THEIR SITE.

82%



XIV

Business
Data >

Average rating of the
importance of the topic:
Serbia: 4.05; rank - 7
Croatia: 3.19; rank - 7/8



From our survey it is clear that local online media in Croatia, although they often point out the unfavourable economic situation, are in a much better financial situation than those in Serbia.

Asked whether they operated with a profit in the last fiscal year, 58% of the surveyed media in Croatia, but only 36% in Serbia, answered positively. In Serbia, 28% of those surveyed stated that they had broke even with their operations, while in Croatia that figure was 19%. As many as 13% of local online media in Serbia admit that they operated at a loss, while in Croatia there is only one such outlet (4.8%).

This question was not answered, or indications were given that they do not operate within a business setting, by 10% of the surveyed media in Croatia and 23% in Serbia. We asked respondents whether they have large debts (in excess of 1,000 euros). The majority of respondents (Croatia - 85%, Serbia - 87%) stated that they have no debts.

Of the remaining media in Serbia, 8% are indebted to state institution or bodies, while 2.6% (one media outlet) are indebted to a commercial bank. In Croatia, the only media outlet that reported debts owes money to its business partners (4.8%).

REVENUE STRUCTURE

The surveyed media outlets in Serbia are characterised by having a dominant source of income, one that contributes to their budget with more than 50%. There are 26 such media outlets (67%), while the most media, 14 of them, are dependent primarily on public funds (36%).

The second most common are media outlets that are mainly maintained by commercial revenue from the media itself and other revenue from publishing (18%), and, as such, they provide, for example, press clipping services, computer maintenance, consulting or have profitable publishing activities.

Two media outlets are predominantly funded by projects, from private and other non-state funds.

In Croatia, a dominant source of income exists in a slightly smaller percentage, but that still accounts for more than half of the surveyed media - 11 or 52%. In this, in seven media outlets that predominant income (38%) comes from commercial sources, primarily from advertising, while in one case it also comes from sponsorship.

Only three Croatian media outlets (15%) are financed mainly by public funds, while over 75% of the surveyed media do not have this type of income at all. In Croatia there is almost no project financing from private sources, which 85% of the surveyed media outlets do not have.

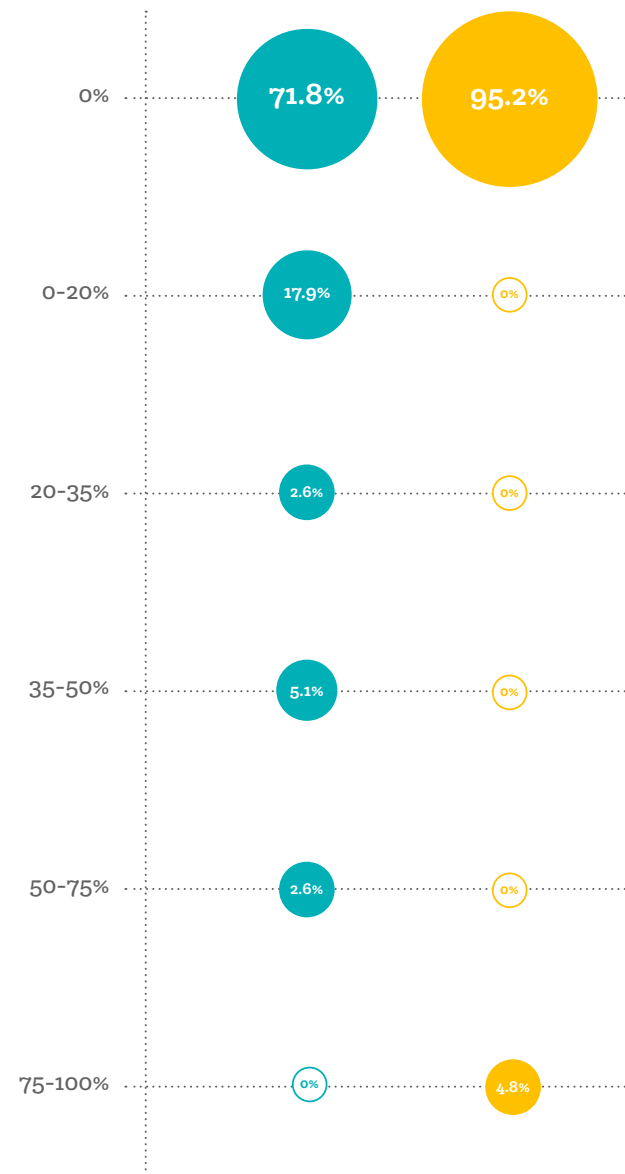
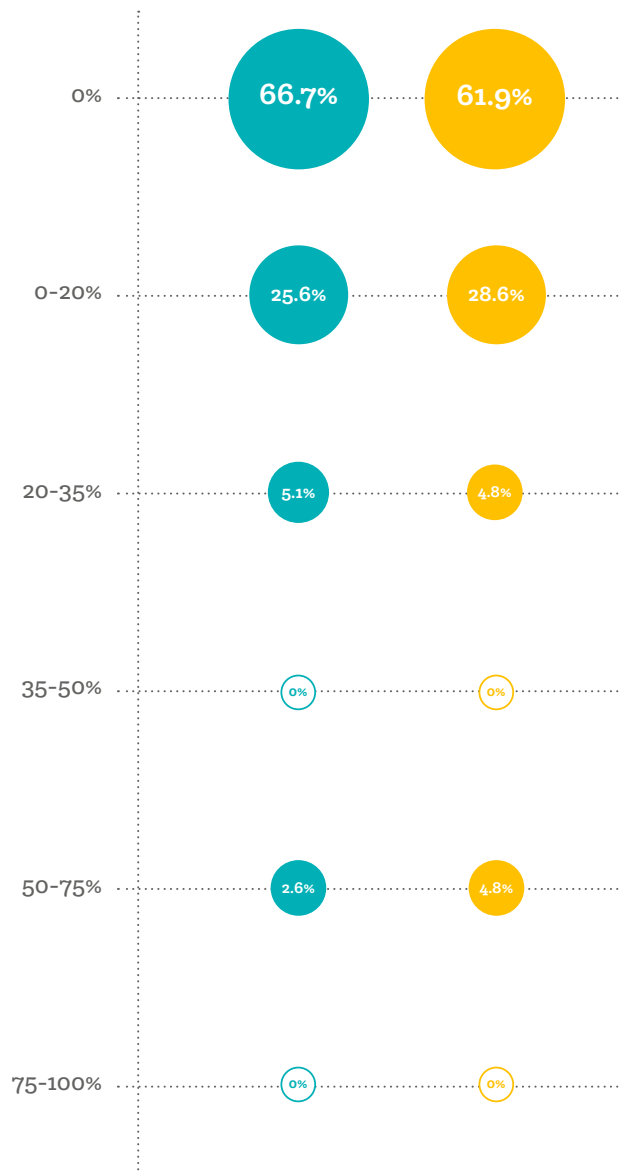
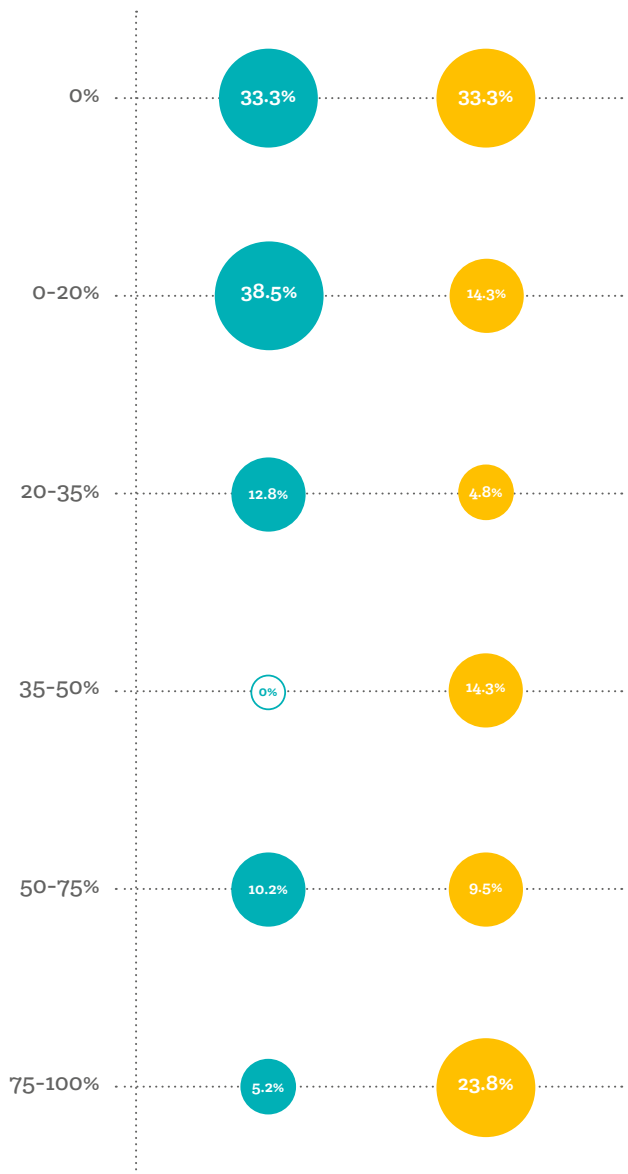
It is striking that donations of readers, including crowdfunding, represented an almost completely untapped potential in online media in both countries.

REVENUE STRUCTURE - COMPARATIVE OF SERBIA AND CROATIA

Advertising income:

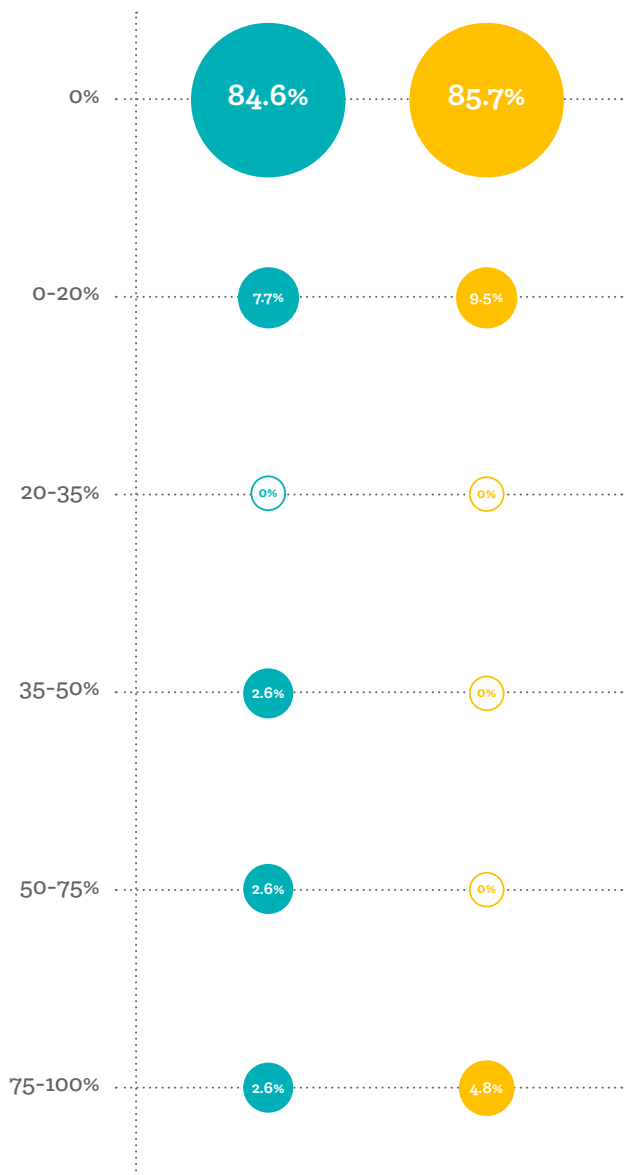
Sponsorship income:

Income from calls for proposals – national:

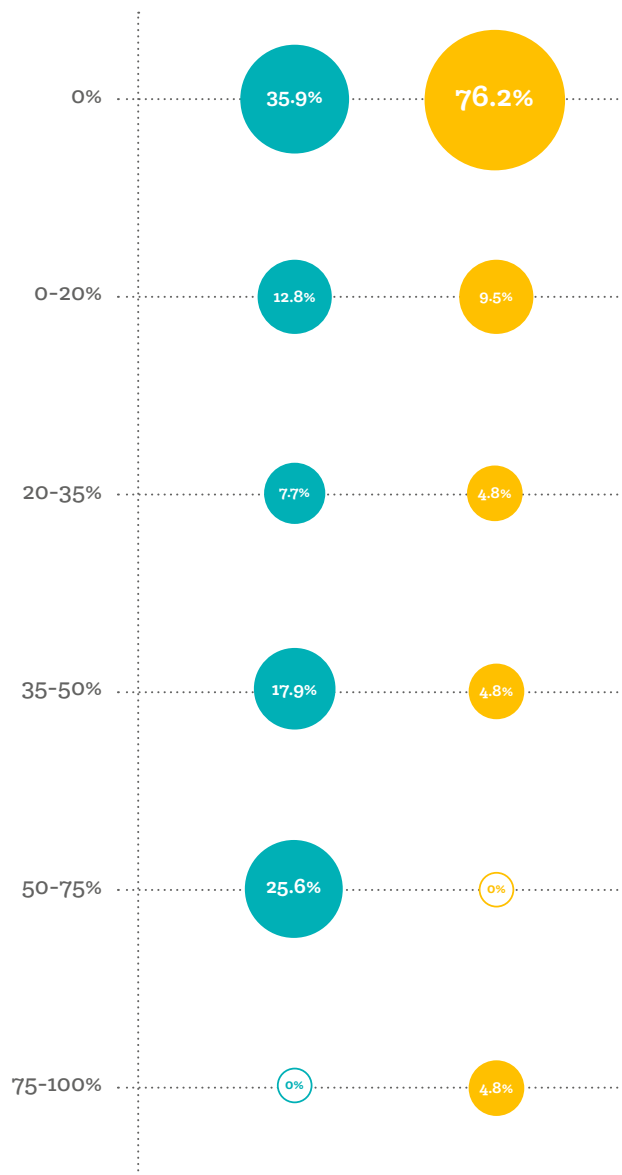


REVENUE STRUCTURE - COMPARATIVE OF SERBIA AND CROATIA (CONT.)

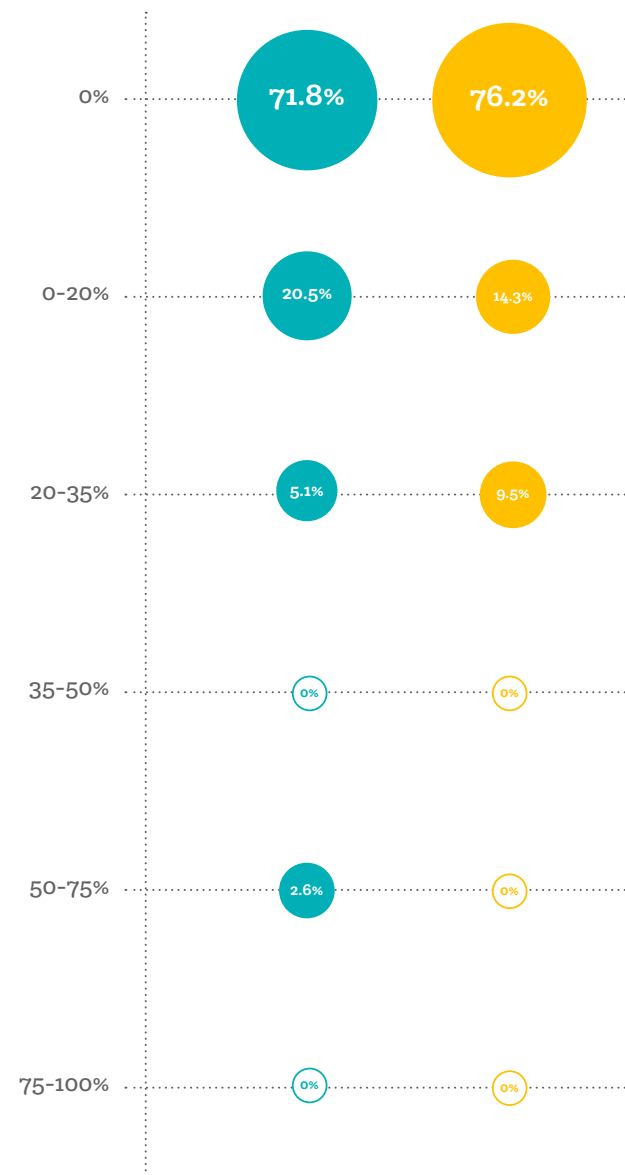
Income from calls for proposals – sub-national:



Income from calls for proposals – city/municipality:



Other financing from public funds:

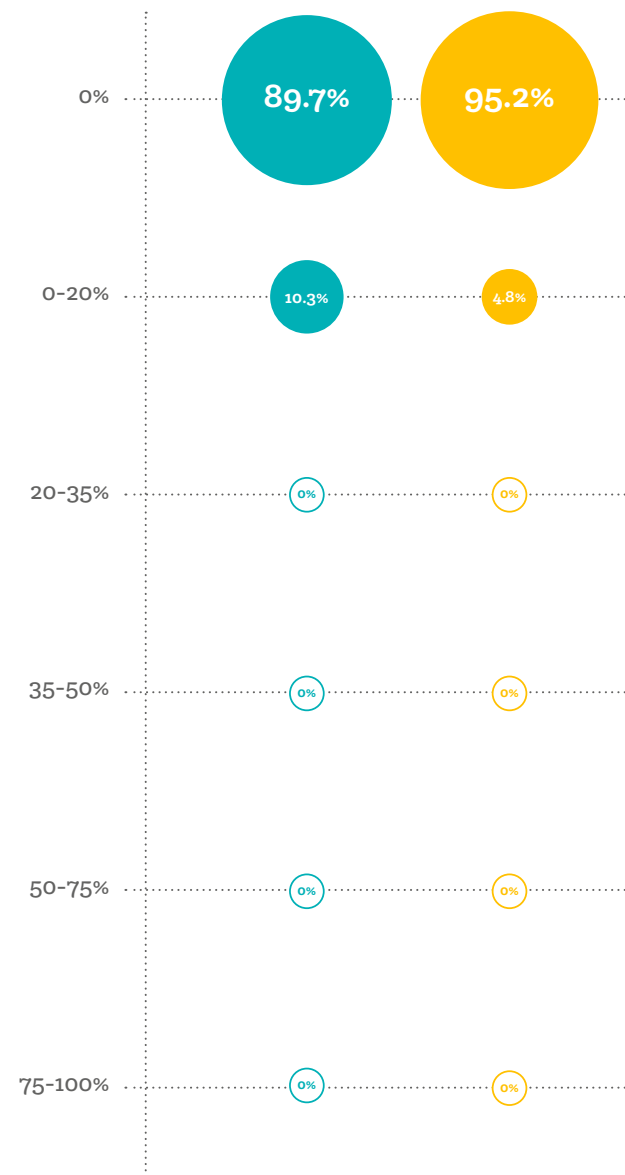
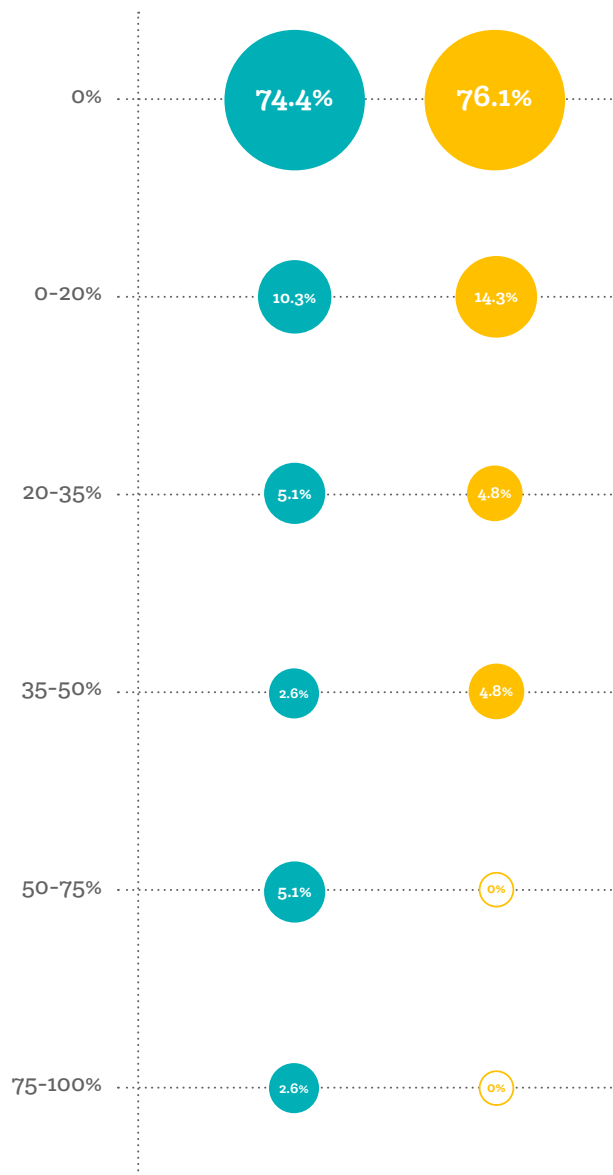
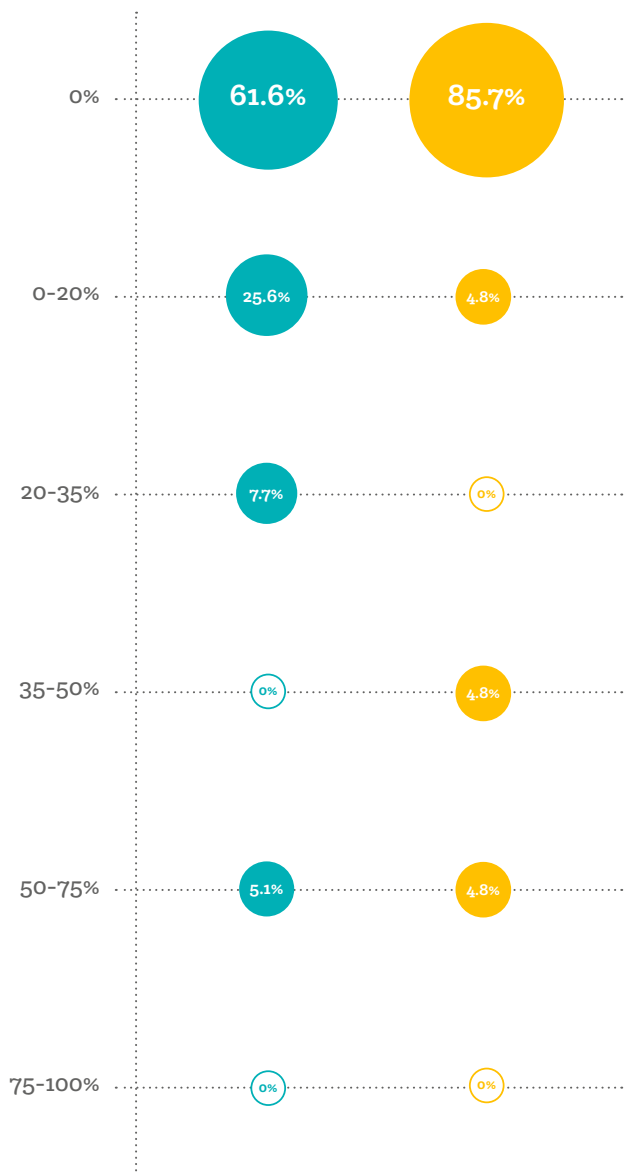


REVENUE STRUCTURE - COMPARATIVE OF SERBIA AND CROATIA (CONT.)

Other project-based funding – foreign/domestic:

Funding from other funds of the company:

Funding from voluntary contributions / crowdfunding

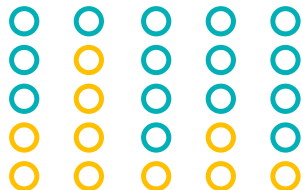


STATE ASSISTANCE TO MEDIA

It is evident that respondents in both countries are fairly dissatisfied with the current way of allocating money to the media from the public budget.

Asked to express their satisfaction with a grade from 1 to 5 (with “one – 1” representing the worst score), they gave the current system of budget co-financing for media projects an average grade of 1.61 in Serbia and 1.8 in Croatia. Nobody gave the top grade, while only one media outlet in each country gave a grade of 4.

In Serbia, as many as 20 media outlets gave a grade of 1 for the way in which the state helps to finance media outlets. In Croatia, the most common grade is 2, as declared by eight of the surveyed media outlets.



PUBLIC FUNDS DO NOT PROVIDE FOR MEDIA SUSTAINABILITY



“This kind of project system is limited in terms of time because it can be seen that the state is exiting the media scene. Municipalities and the state have both drastically reduced the funds for financing the media via projects, compared to what had previously been allocated. That cannot ensure the sustainability of these media outlets.”

(Zvonko Damnjanović, *Media Centar Bor*, Bor, Serbia)

1. SERBIA

The media outlets that participated in in-depth interviews were almost unanimous in condemning the current system of public financing of the media.

Saša Trifunović (*Ist Media*, Bor, Serbia) said that the local governments exert pressure on commissions, thus most resources are given to local media that were public outlets prior to the recent privatisation.

The *Grad Subotica* website (Subotica, Serbia) applied for budgetary co-financing at both local and national level, but their applications were unsuccessful. “We officially have no state owned media, while unofficially they are all state media. There everything is solved through direct personal contact. I know that I should call someone in order to get funds, but we will not do that,” says chief editor of this site Mladen Prijić.

At *Južne vesti* (Niš, Serbia), which received funds through both local and national public calls for proposals, they say that they probably will not apply after the recent decision whereby the minister or the promoter can change the proposal of the commission, which is not in accordance with applicable law.

“I am absolutely not satisfied with the way funds are allocated. It is non-transparent, there is almost no good side,” says Predrag Blagojević, chief editor of *Južne vesti*.

The chief editors of *Južne vesti* and the *Grad Subotica* site agree in their opinion that the financing of media from public funds should be banned entirely.

The only respondent who thinks that the system of project-based co-financing of the media should be given a chance is Zvonko Damnjanović from *Media Centar Bor* (Bor, Serbia). He gave a grade of “3”, among other reasons, because his media outlet was not paid in full the funds allocated at last year’s

call for proposals by the municipality, but also because of other faults that he is aware of.

However, Damnjanović, who was a member of the working body that evaluated the writing of projects in several municipalities, noticed a major improvement.

“From that: ‘Give us money, we’ll do it, I swear’, just a few years ago we reached the stage that they know well to write a serious, more professional project,” says our interlocutor.

He stresses that there is a lack of preparation with the organiser of the calls for proposals, because clear competition rules need to be set regarding precisely what it wants to finance, in contrast to the international competition in which this media participated.



2. CROATIA

Given that tenders for the project financing of the media which are not backed by the state or local government are extremely rare, the responses of the surveyed media outlets regarding the process of preparing project documentation related almost exclusively to calls for financing from public funds. Thus, 13 portals (62%) stated that they “do not apply for grants”. Among the remaining eight that do apply (38%), in seven cases (88%) projects are written by one of the employees with relevant experience, while in one case (12%) that job is done for the portal by a paid professional.

Some 15 portals responded when asked about their reasons for not applying to calls for proposals (though 13 of them previously stated that they “do not apply to grants”). Of these 15, the majority (nine, or 60%) say that they lack information regarding calls, two portals (13%) explain that they do not apply

because they do not have the knowhow to write projects, and one each (7%) state that they “do not know the procedure”, “think that they do not meet the criteria”, or that they “do not need it”.

SURVIVAL AT STAKE

“Gospić local authorities decided to halt the funding of the portal from public funds, which in previous years amounted to around 1,500-2,000 euros annually. When the very weak reaction of the economic sector is added to that, I am considering closing the portal after 15 years of its existence.”

(Marko Čuljat, editor and owner of *Ličke novine*, Gospić, Croatia)

“”

NON-STATE PROJECT FINANCING

Among the two surveyed media outlets from Serbia which said that they are primarily (over 50%) funded from projects submitted by private donors is *Južne vesti* from Niš. *Južne vesti*, due to its range, impact and criticality, but also its financial stability, is considered by many as being the most successful local media outlet in Serbia.

Its projects are written by one employee, who is also a member of the management board. He is an expert who has his own consulting agency and vast experience.

“From the beginning we had a very good position with donors and it is rare that donors refuse us. They increasingly call us themselves and ask how they can help. They obviously need someone outside Belgrade who can meet the goals, who has references, who has a young editorial department... And that is useful for everyone,” says Predrag Blagojević.

The project documentation for participation in public calls for proposals (regardless of whether that relates calls by of the public authorities or private donors) in more than three-quarters of cases is written by someone among the employees in media outlets. In 56% of cases that is someone who the respondents consider as having the knowledge and experience needed for the job, while in 21% of cases that is done by employees without knowledge and experience in that field. Zvonko Damnjanović, editor of *Media Centar Bor*, explains how his media outlet has frequently participated in projects via membership in an association of local media outlets, Local Press.

“Although now there is far less of that, because they also have increasingly fewer grants. Donors have retreated and ‘stopped a little,’” states Damnjanović.



He highlights that Local Press helped them a lot by organising training for the writing of projects. Projects at the *Media Centar* are written by the employee who has gone through training there and is proficient in the English language.

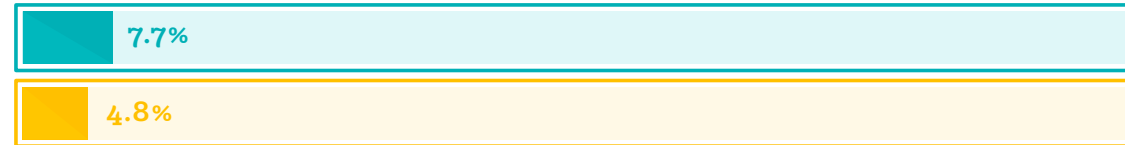
Only two media outlets (5%) responded by stating that projects are written by paid professionals outside the media outlet.

COMMERCIAL REVENUE SOURCES

1. CROATIA

Eighteen portals (86%) offer the possibility of advertising on their site, while three (14%) have no such possibility. Of those three, one explains it as being due to the absence of advertising as a result of belonging to the non-profit sector, one emphasises the temporary nature of such a situation, while the third without explanation says that it “has no advertising”.

Written by a paid professional with proven project writing knowhow:



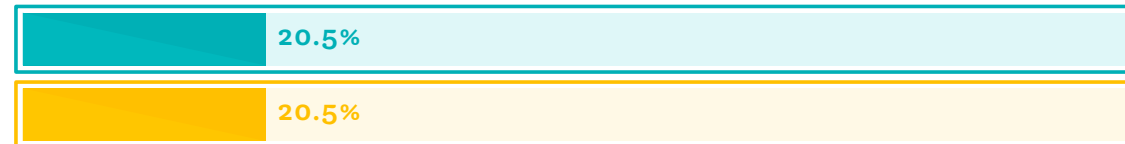
Written by a paid individual whose experience is not known:



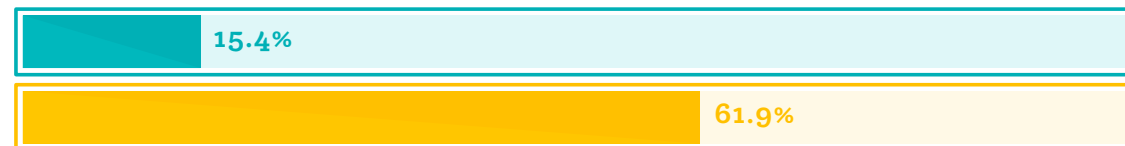
Written by an employee with project writing knowhow:



Written by an employee with no project writing experience:



We do not apply for funding tenders:





Among the 18 portals that offer the possibility of advertising, 17 (95%) envisage that as being through paid banners, 15 (84%) with paid articles and nine (50%) with ads via Google.

Draženko Požarić, editor and owner of the portal *Parentium* (Poreč, Croatia), said that he does not contact companies at all in order to sell advertising space, because they initiate contact themselves in sufficient numbers. “We went through a major crisis during which we also had tax debts, but now we plan to hire another two associates (so we will have three employees), to technically upgrade the portal and powerfully enter into audio and AV technology,” notes Požarić. Expansion thanks to advertising revenues also announced at the newsroom of the portal *Osijek News* from Osijek.

“The portal pays for itself through advertising and sponsored articles. We have everything ready to launch, in autumn, a national portal that will deal with ‘lighter’ issues and with the Slavonia-Baranja (county) regional portal,

for which the newsroom of *Osijek News* will be the central place for all three,” says Mihael Šilac, editor and owner of this website.

2. SERBIA

While at *Media Centar Bor* they complain that they find it increasingly tougher to come by ads, at *Južne vesti* they are convinced that this is because of “people who still think that it is better to advertise in traditional media and who do not understand what advertising based on the number of displays means.”

“Our economy is unfortunately fairly weak, the market is small; we cannot expect major advertisers. If we looked at this job from the perspective of profitability, this site would not exist,” say the editorial staff of the *Grad Subotica* website, which is exclusively funded by advertising revenue.


At *Južne vesti* they also complain about the politically motivated abuse of state bodies in terms of pressure on advertisers, because *Južne vesti* is critically orientated.

TAX INSPECTORS CHECKED OUR ADVERTISERS TOO

“”

“Tax inspectors come to us and seek only outgoing invoices, and after a week we are called by three to four advertisers who say that inspectors checked their finances and issued fines against them. In doing so they also let them know that they came because of Južne vesti. We did not write about that, because we thought that in doing so we would scare other clients.”

(Predrag Blagojević,
Južne vesti, Niš Serbia)



Advertising on the surveyed media sites is most commonly envisaged in the form of paid banners (85% of cases). Apart from that, 44% provide the possibility of paid articles, and 38% offer Google ads. One media outlet (2.6%) stated that advertising is possible with them via the networks ETarget and AdNow. Smaller media outlets do not have a person or service responsible for marketing, but rather they offer marketing opportunities to their business partners and friends. Advertising agencies usually contact them on their own initiative and offer the advertisements of their clients.

Thus, at *Južne vesti* they say that 90% of their advertisements come via agencies, while direct sales are at the level of statistical errors. Among the media outlets with which we conducted in-depth interviews there exists a significant difference in perceiving the advertising of clients on their sites through paid texts.

While *Media Centar Bor* is strongly opposed to such advertising, and *Južne vesti* permits this option only with a clear indication that it is paid content, the *Grad Subotica* portal does not mark such articles and also readily agrees to promote them via its social media accounts.

STRUCTURE OF EXPENDITURE

By far the largest expense for respondents in Serbia are salaries and fees for employees and freelance correspondents. Among 46% of the surveyed media outlets this cost “eats” more than half of the total budget, while in 5% of cases it accounts for more than three quarters of the budget. Some 18% of the surveyed media do not spend anything on associates. In terms of responses to the question of what they need in terms of material conditions, money for paying salaries and freelance fees is the second most important material need, after new equipment.

The next most significant expenditures, on which 13% of the surveyed media spend more than half of their budget, are the costs of site hosting, maintenance and development (8% of the surveyed media outlets spent more than three-quarters of their budget on this) and the cost of purchasing equipment (more than three-quarters of the budget among 5% of respondents). Some 36% of respondents do not spend anything on equipment.

There is evident stratification in Croatia among portals that do not spend anything on salaries and fees (33% of media) and those on that allocate 50-75% of total expenditures for this purpose (43% of media).

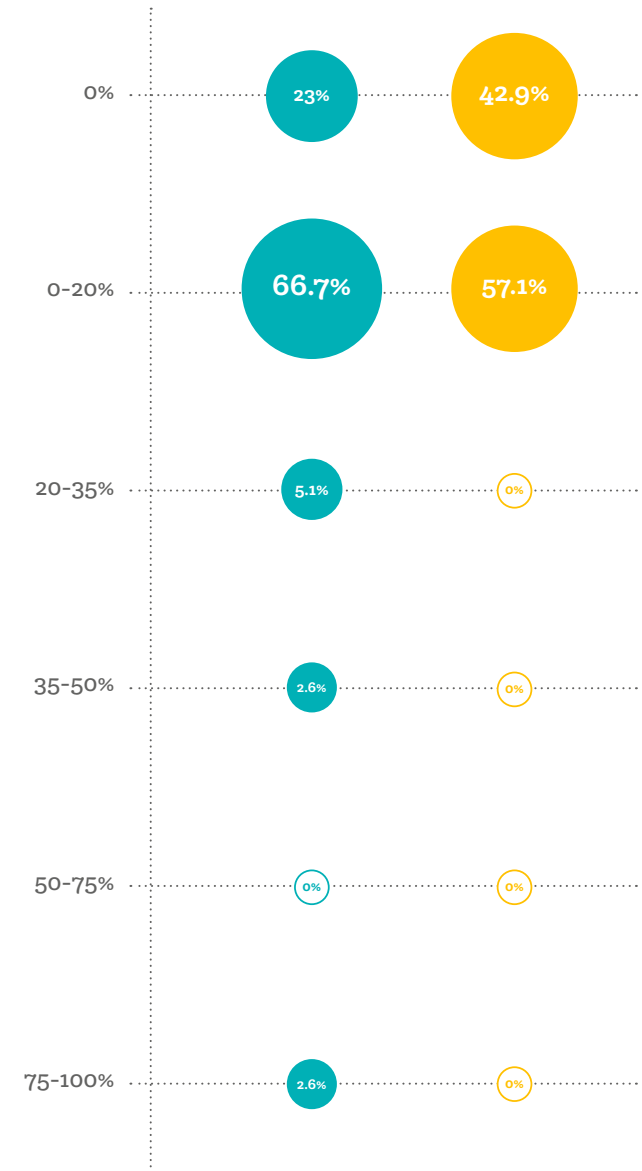
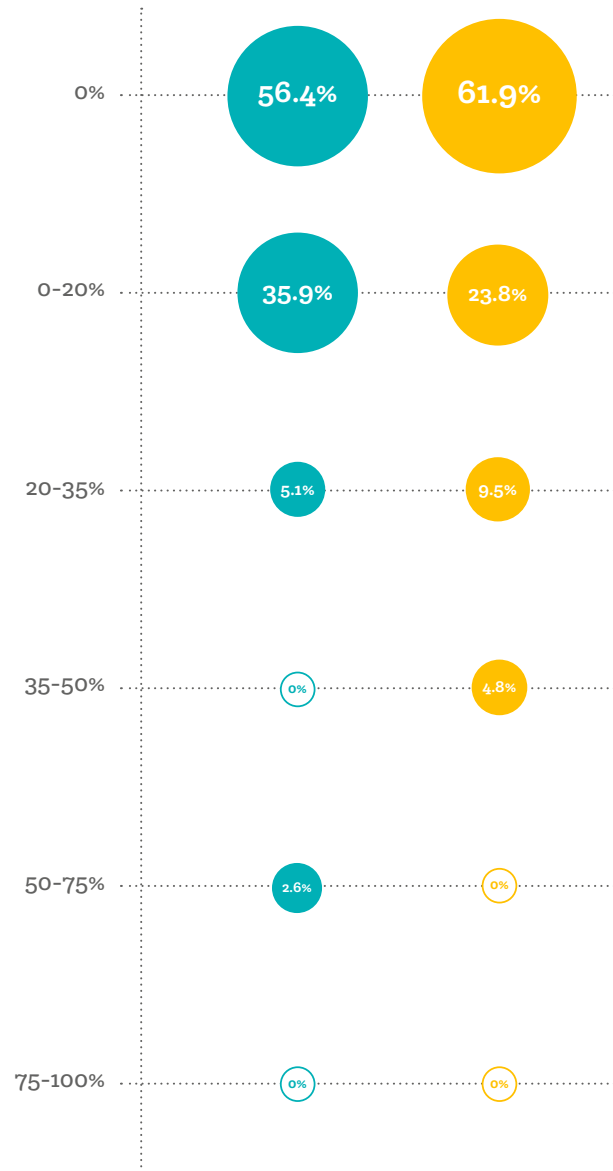
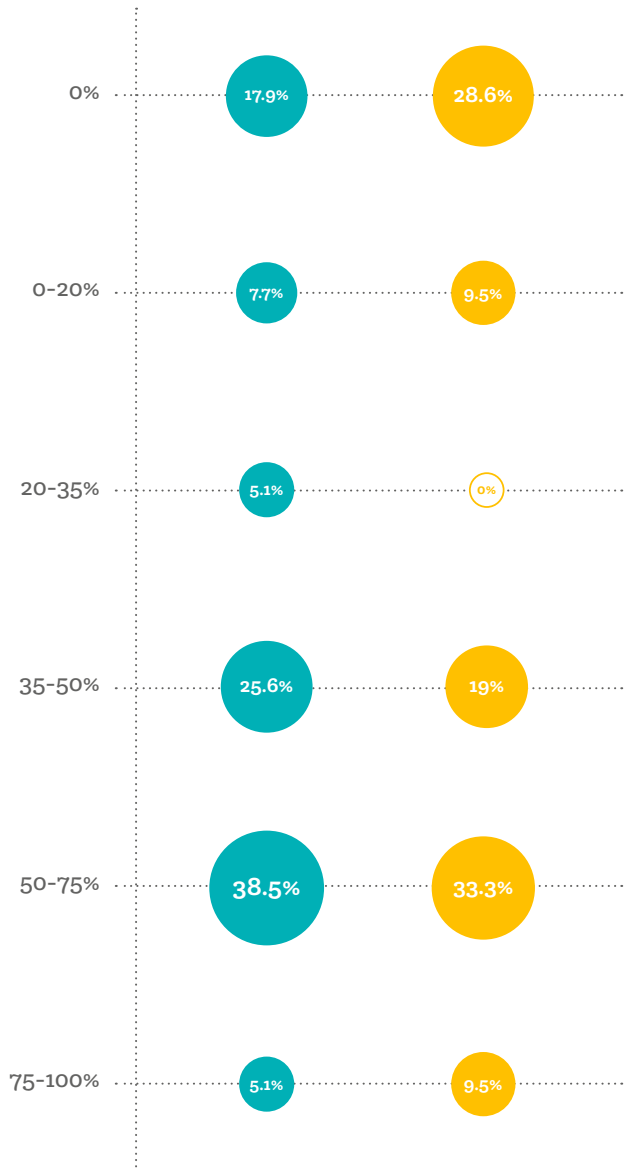
Among other expenses, the large part of allocations is spent on taxes and fees, hosting and support, purchases of equipment, accounting and similar services.

STRUCTURE OF EXPENDITURE - COMPARATIVE OF SERBIA AND CROATIA

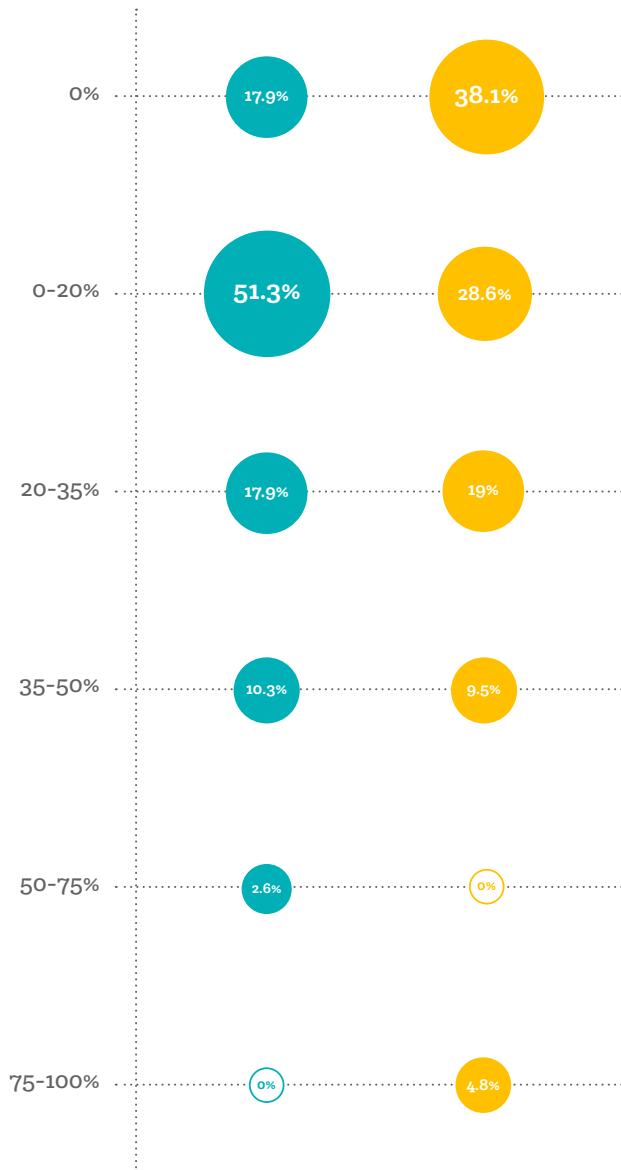
Salaries/fees of employees and associates

Rent of business premises

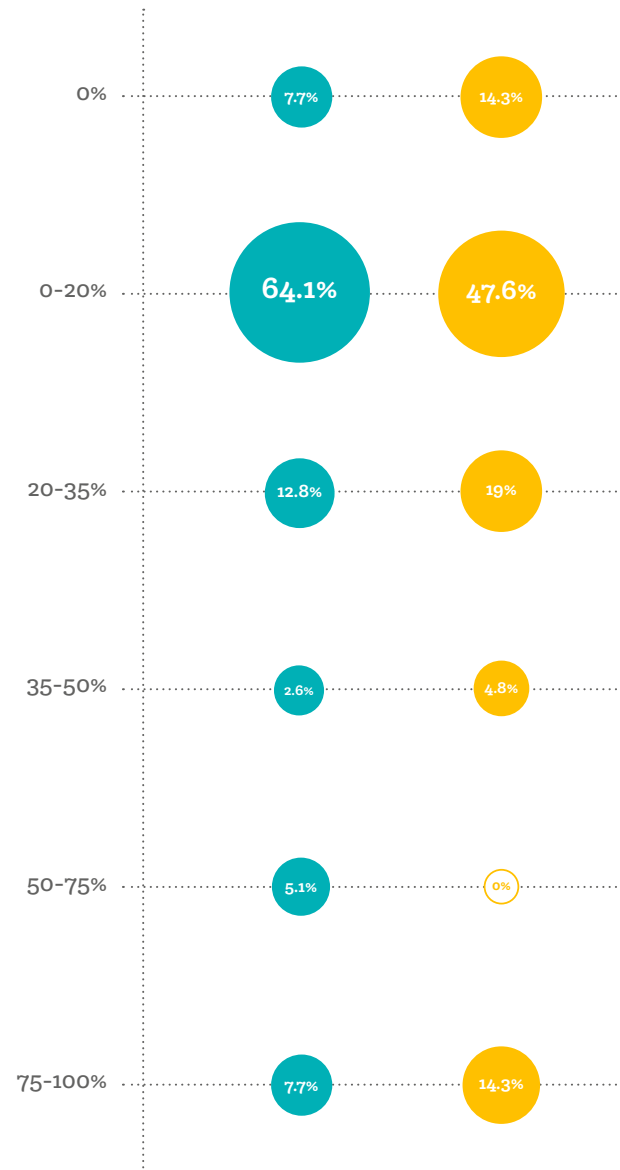
Expenses of overheads/utilities



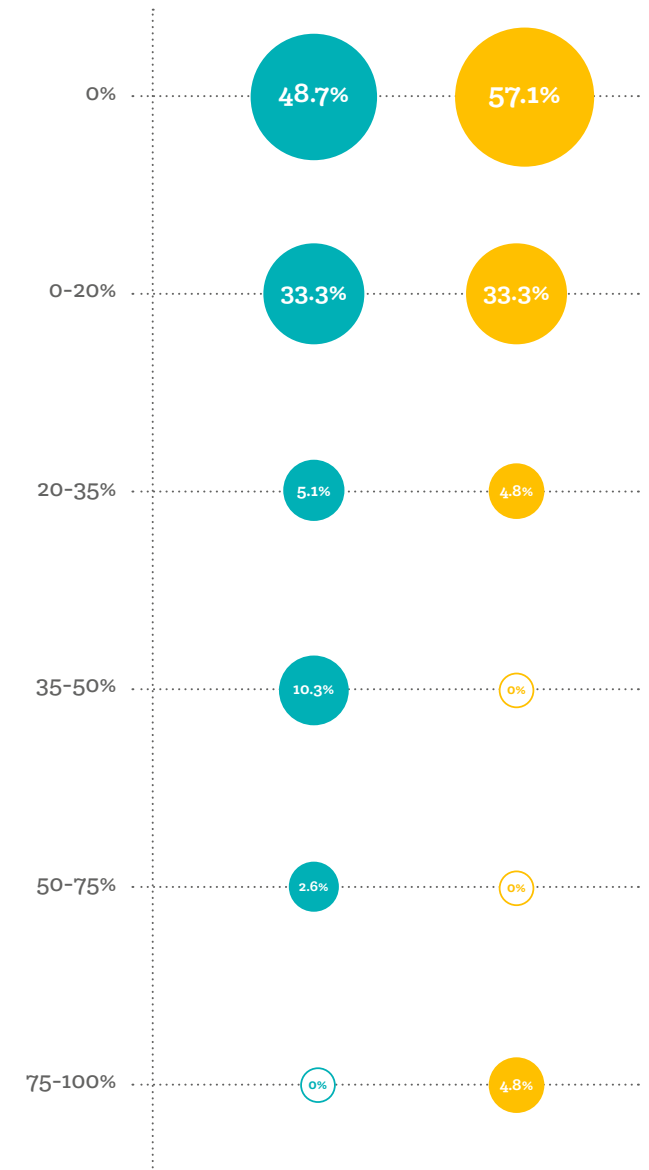
Taxes and charges



Costs of site hosting, maintenance and development



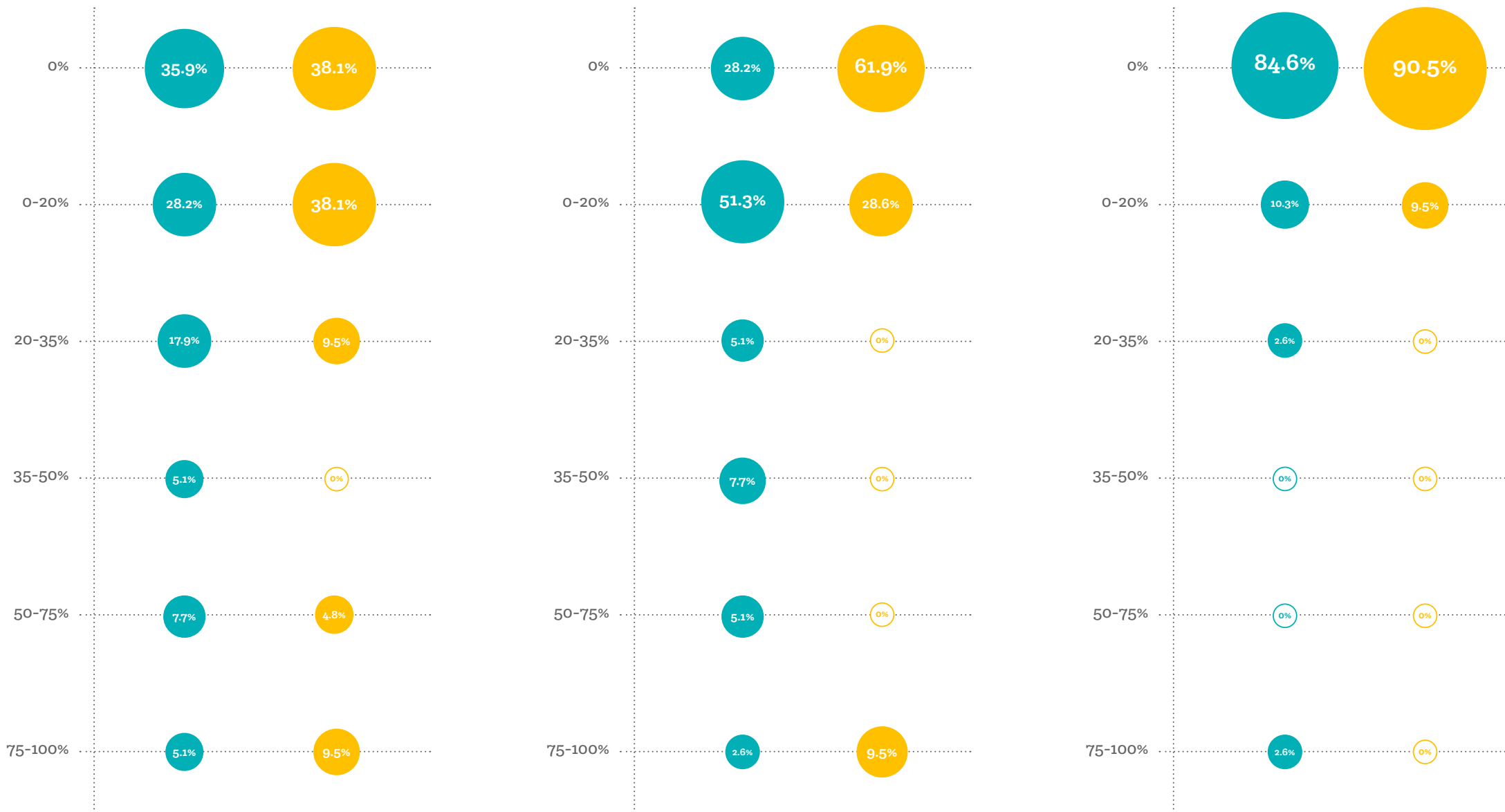
Business travel costs



Equipment purchases

Equipment maintenance

Equipment hiring



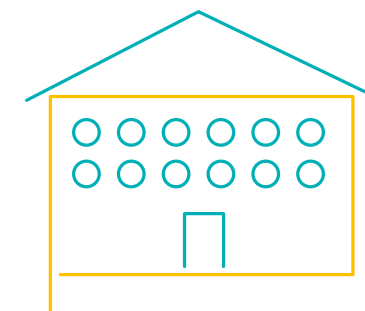
STRUCTURE OF EXPENDITURE - COMPARATIVE OF SERBIA AND CROATIA (CONT.)



BUSINESS PREMISES

As many as 41% of the surveyed media portals in Serbia operate in the private houses and apartments of members of the editorial team, while 36% of them rent premises. Business premises are owned by 13% of them, while 10% work in premises given to them to use free of charge.

In Croatia, precisely a third of portals work in premises that they own, while another 14% each work from premises provided free of charge, and private houses/apartments of members of the editorial team. The remaining 33% work out of rented premises, while one respondent did not specify.



YOUR EDITORIAL DEPARTMENT WORKS IN:

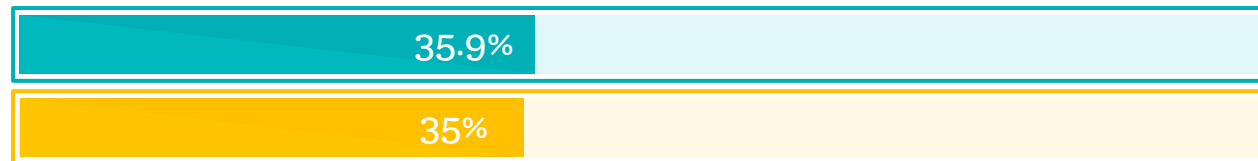
SERBIA

CROATIA

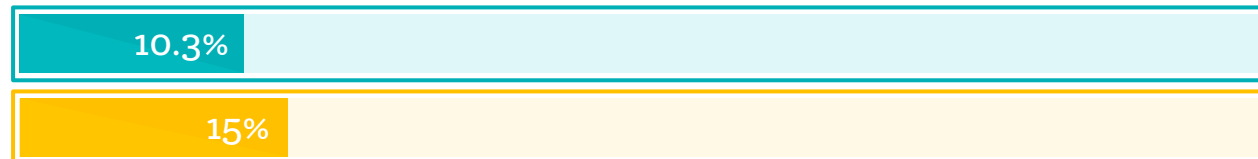
Business premises that it owns:



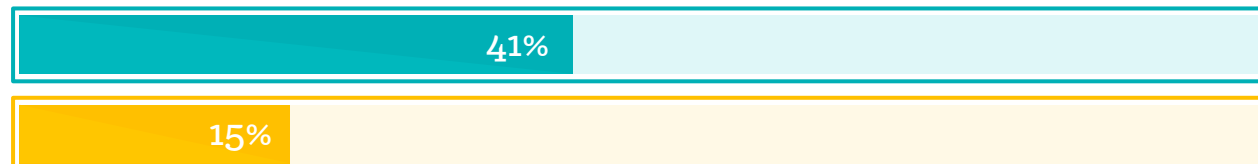
Rented business premises:



Business premises acquired for usage free of charge:

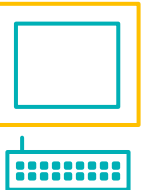


Private houses and apartments of members of the editorial board:

**EQUIPMENT**

The editorial departments of local online media in Serbia possess an average of 5.13 computers, while their average age is 4.85 years. Surveyed portals in Croatia own an average of 4.2 computers, with an average age of 3.9 years.

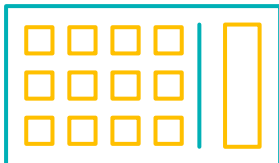
Of the remaining equipment, in Serbia this are mostly photo and video cameras, which are owned by 74% of media outlets (36% with one each, and 36% with more), followed by smart mobile devices, which are owned by 67% of the surveyed media outlets. Printers and scanners owned by 64% of respondents, while 56% have dictaphones. Motor vehicles are owned the least and are possessed by 36% of the surveyed online media outlets. Photo and video cameras, as well as printers and scanners, are owned by 82% of respondents in Croatia. Dictaphones are owned by just under 76% of portals, while 61% have smartphones. Here cars are also the least



common possession – at 48%. Asked what they would need in terms of materials for their work, 27 of 31 media outlets in Serbia, and 9 of 12 respondents in Croatia who responded to this question state that they need new, better or lacking equipment.

ACCOUNTING

Professional accountants perform book-keeping services for 77% of the surveyed media outlets in Croatia and 80% of respondents in Serbia, while 15% of them (Serbia – 13%) state they are not carrying out accounting because they are not obliged to do so. The remainder, with varying degrees of success, manage on their own.



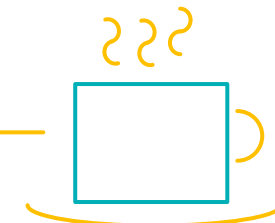
T-SHIRTS, MUGS AND ROOMS FOR RENT

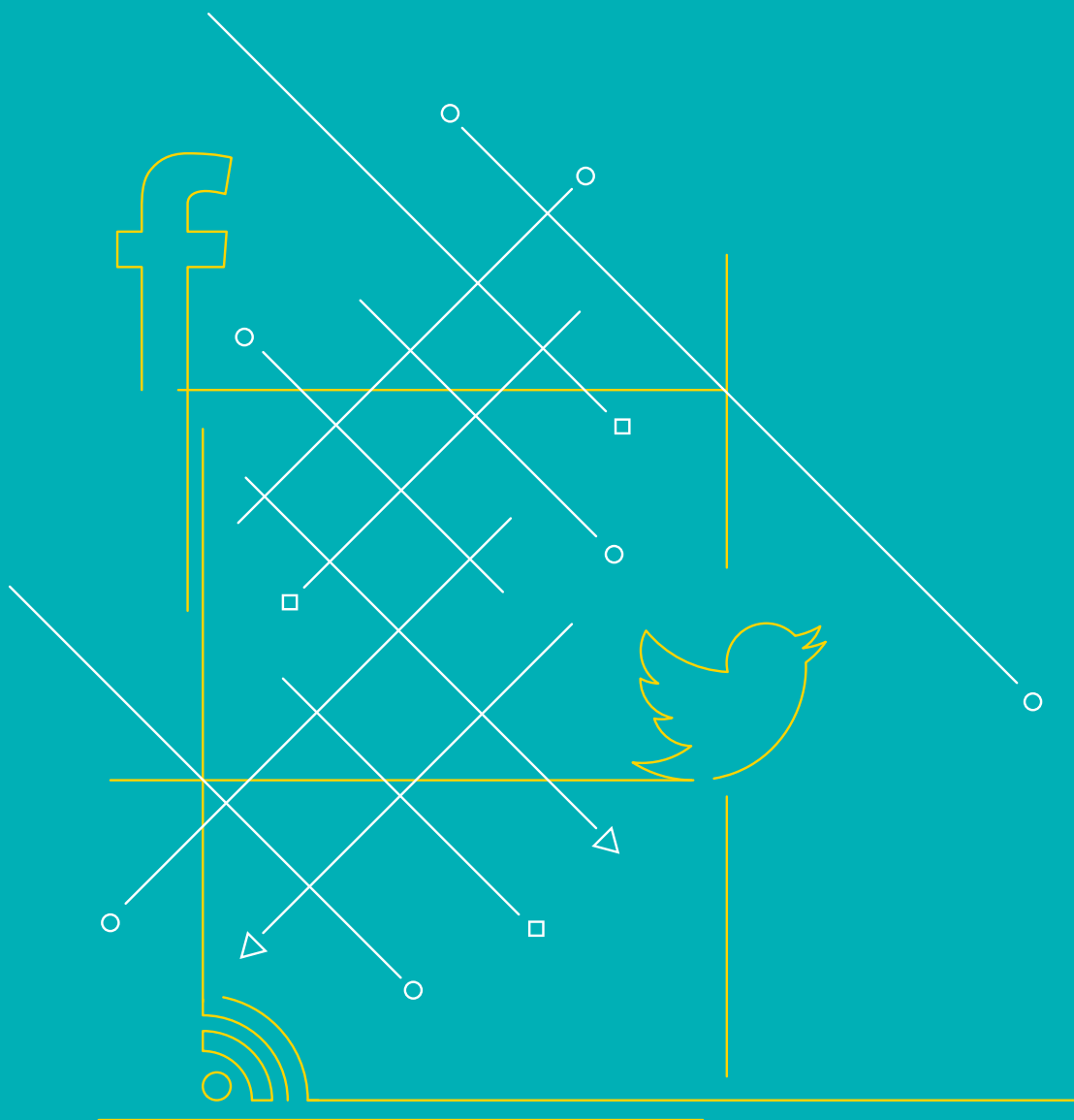
There are ideas on how media outlets can make use of their sites in a commercial way beyond classic advertising. Predrag Blagojević, chief editor of *Južne vesti*, says that they want to come up with a way to turn towards the public, to citizens, to sell them t-shirts, mugs, try crowdfunding etc.

Čedo Živković from the site *Zlatar Info* (Nova Varoš, Serbia) seeks sources of commercial revenue primarily in the tourist potentials of the municipality of Nova Varoš.

He plans, once the site is officially registered and able to operate, to offer owners of private accommodation advertising in the context of a business directory on their website “Accommodation on Zlatar”.

Ana Marković, chief editor of *Info zona* (Split, Croatia), confided to us that the association that is their publisher opened a cafe a month ago, which it intends to use to finance part of its activities.





XV

Promotion and Networking >

Average rating of the
importance of the topic:
Serbia: 4.05; rank - 7
Croatia: 3.29; rank - 5



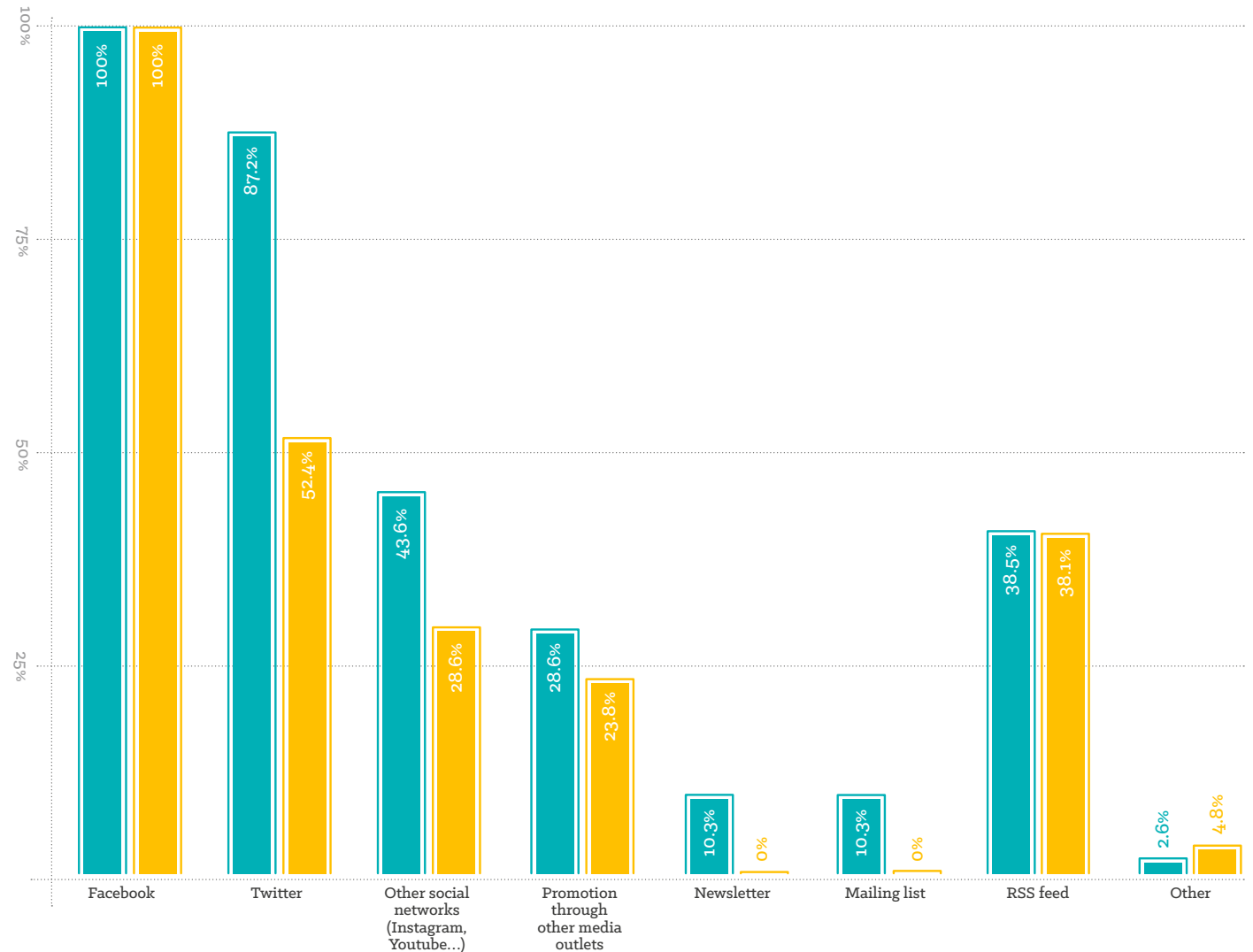
The surveyed media outlets mostly promote their stories via social networks. They all share their stories on Facebook. In Serbia, all those who have Twitter accounts also promote their texts via this social network, while in Croatia this way of using Twitter is a little less common. Media in both countries also use other social networks on which they have accounts for this purpose, but not as regularly.

Beyond social networks, the most common tool for promotions is the RSS feed. A somewhat rarer practice is sending press releases and/or links to other, friendly media, which then inform the public about the publication of a story on the internet. The rarest, fairly neglected promotional resources are newsletters and mailing lists.

WHAT TOOLS DO YOU USE TO PROMOTE YOUR CONTENT?

SERBIA

CROATIA



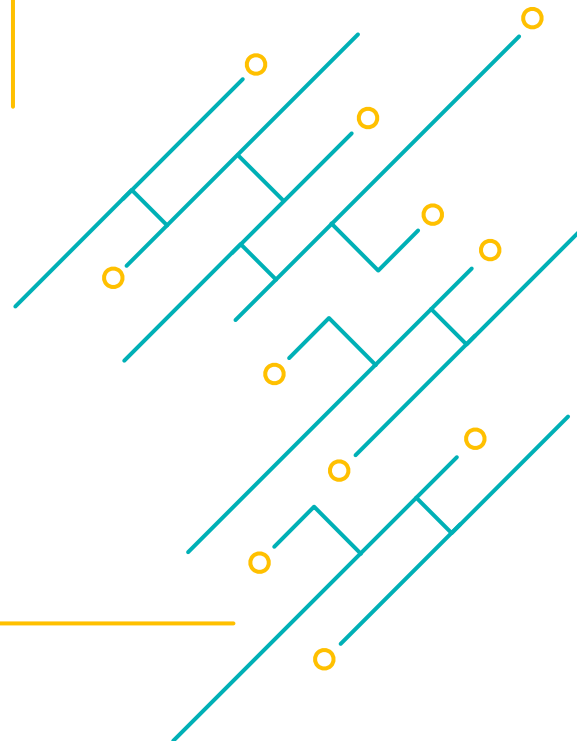
COOPERATION ON PROMOTIONS WITH OTHER MEDIA

About half of the surveyed internet media in Serbia have an agreement with other internet media on the exchange of banners (51%), or on the regular exchange of content (49%). Some 15% of respondents have agreements with broadcast media about guest appearances on their shows to promote newly published stories.

This practice is considerably rarer in Croatia. Only 14% of portals have an agreement with other media on the exchange of banners, agreements on the regular exchange of content have been established by 24% of portals, while only one portal (4.8%) has an agreement with a broadcast media company on regular guest appearances.

CORRESPONDENCE RELATIONS WITH OTHER MEDIA

Some 51% of the surveyed media in Serbia have agreements with media from other domains on the exchange of raw information, or some kind of correspondence relationship, while 18% of them have the same kind of relationship with media from other countries.

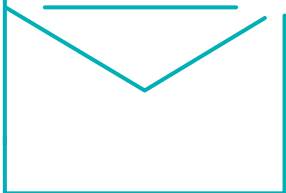


COOPERATION WITH NATIONAL AND FOREIGN MEDIA

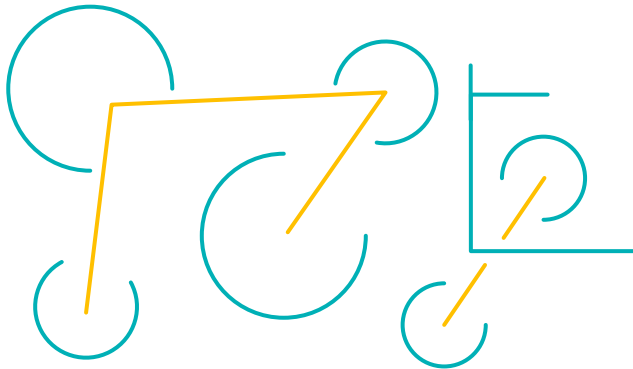
“We have agreed cooperation with national media companies B92 and N1. By mail we agreed the obligations of the parties. Among foreign companies, we work with internet media from Bosnia-Herzegovina and Macedonia. This cooperation is rare and is not officially agreed – rather we made a friendly agreement, as we know each other.”

(Predrag Blagojević, *Južne Vesti*,
Niš, Serbia)

“”



In Croatia, only 14% of portals have arrangements with media from other cities on the exchange of information, while 5% have agreements with media from other countries.



NEEDS IN THIS AREA

In their comments, 18 of the surveyed media companies in Serbia stated that needs exist in this area. One of them considers that they need free training, one states that they need a special person to deal with PR, while a third says that they need help in compiling a newsletter.

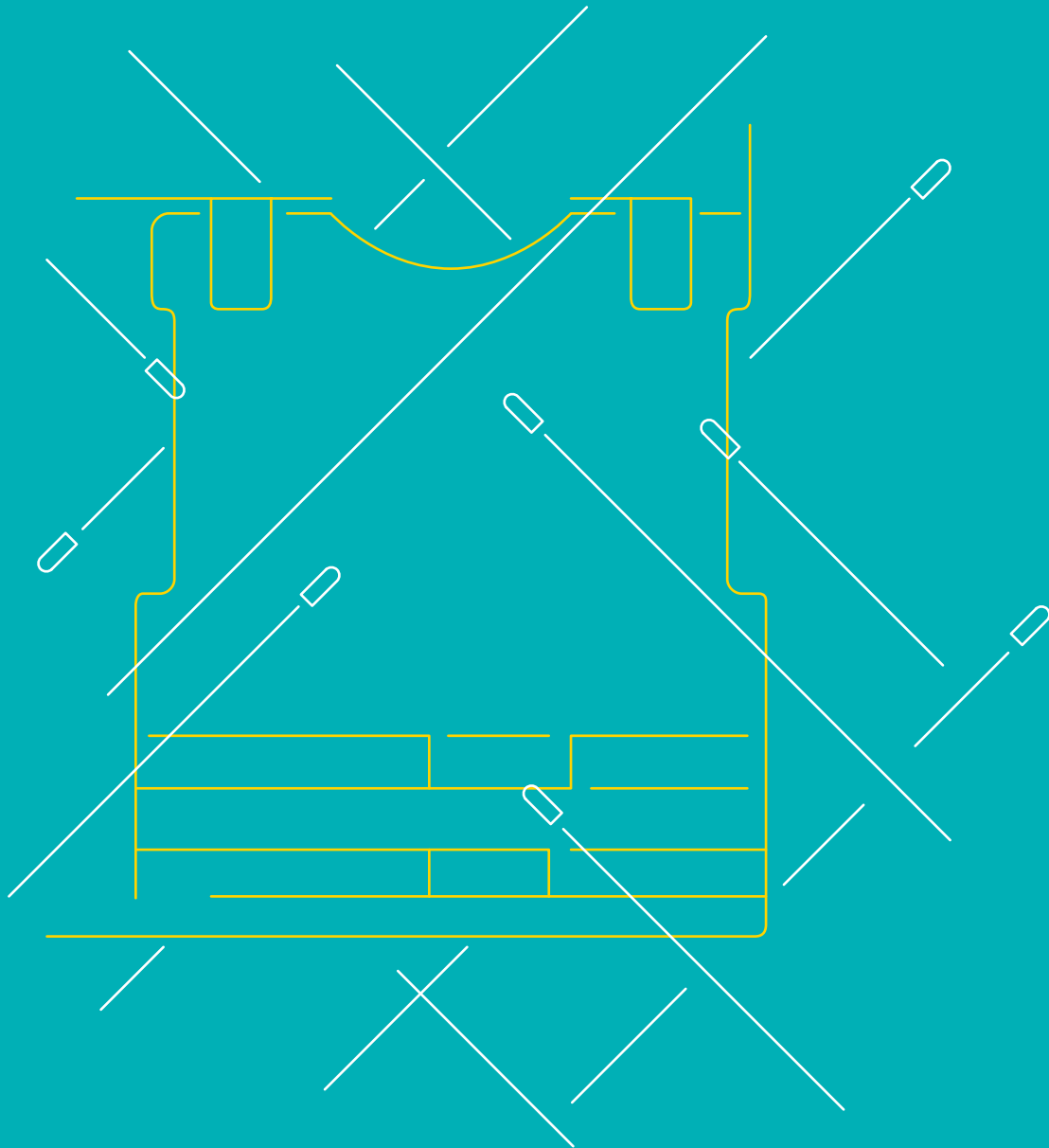
All others emphasise the need to immediately establish cooperation with other media companies. Among them only one is interested exclusively in cooperation for the purpose of promotions, while the other 14 want promotion and exchange of content and information.

Of these, four media outlets are interested in cooperation with media from abroad, two with media companies that target the Serbian diaspora, one media company of a national minority is interested in cooperation with media companies from their mother country, while one media outlet from the border area wants cooperation with media from Bulgaria and Romania through joint cross-border projects.

In the comments, there is an emphasis on the difficulty of finding suitable partners, while it was also proposed that direct meetings be organised with representatives of media companies interested in cooperation.

In Croatia, a much smaller number of respondents commented on this matter, and from interviews with the editors and owners of portals we learned that they do not believe that investing their energy in networking with other media companies would pay off in terms of content and visibility.





XVI

General
Security >

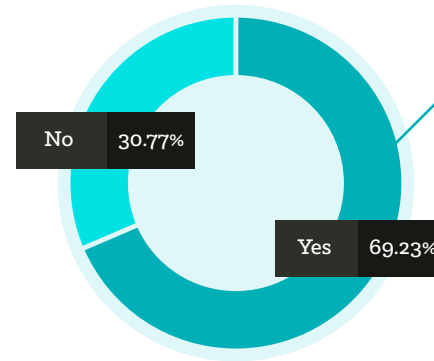
Average rating of the
importance of the topic:
Serbia: 3.90; rank - 10
Croatia: 2.95; rank - 9

Some 64% of sites in Serbia and 57% in Croatia reported that their journalists or media outlet had been the victims of some form of threat to their security. Particularly concerning is the fact that 51% of the surveyed media outlets in Serbia and 48% in Croatia claim to have been subjected to threats and/or pressure from the local authorities.

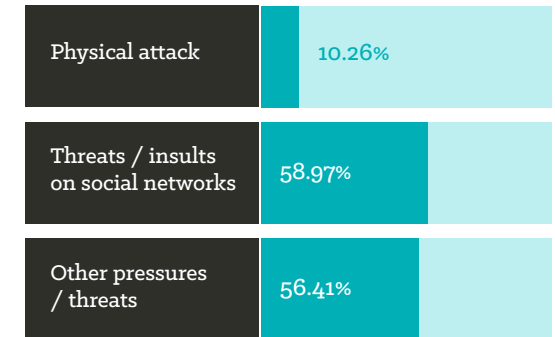
The most common threats or insults in Serbia were made via social networks, which were experienced by 59% of the surveyed media outlets (Croatia – 43%). Journalists perceive such threats much more seriously if they also contain their personal data, addresses, phone numbers, which happens much more frequently at the local level than at the national level.

SERBIA

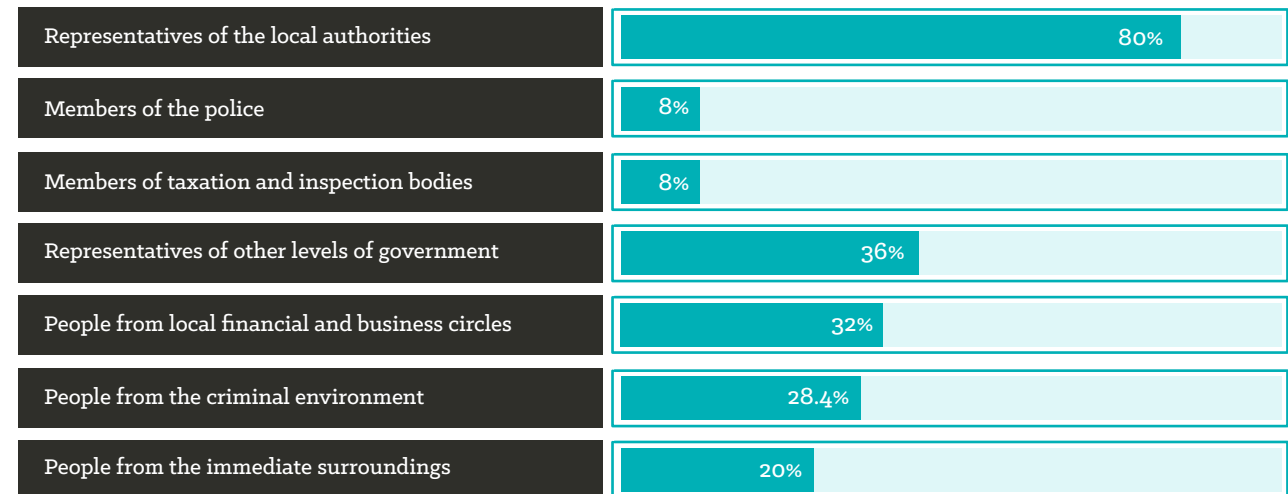
HAVE ANY OF YOUR ASSOCIATES BEEN SUBJECTED TO THREATS, INSULTS OR ATTACKS AS A RESULT OF THEIR WORK AT YOUR MEDIA OUTLET?



IF YES, WAS THEIR SECURITY THREATENED, WHAT TYPE OF THREAT OCCURRED?



SOURCES OF PRESSURE/THREATS



Comments most commonly emphasise the need for respect of the law and a timely and more dedicated response from the police and the prosecution service, as well as greater efficiency in the work of the courts.



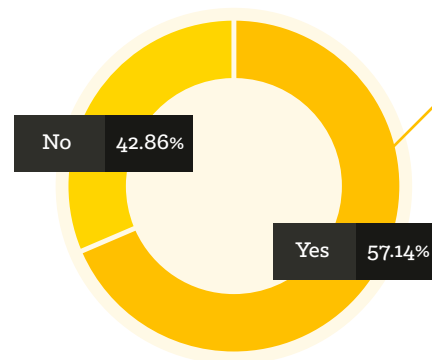
They also refer to a need for education in this area, legal protection and better cooperation with local authorities.

“We barely succeeded in convincing an associate in Prokuplje to report to the police very explicit telephone threats from a local politician. Two years later we were informed by the prosecution that they had failed to prove that the threats from this telephone number were sent by that particular politician, because someone could have taken his phone.”

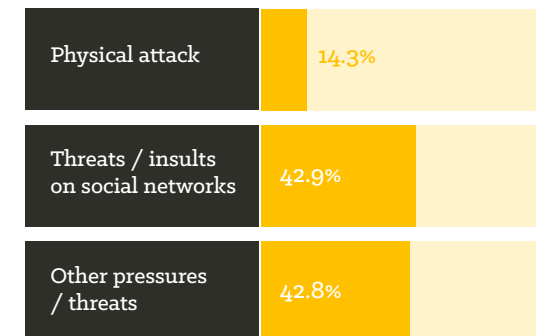
(Predrag Blagojević, *Južne vesti*, Niš, Serbia)

CROATIA

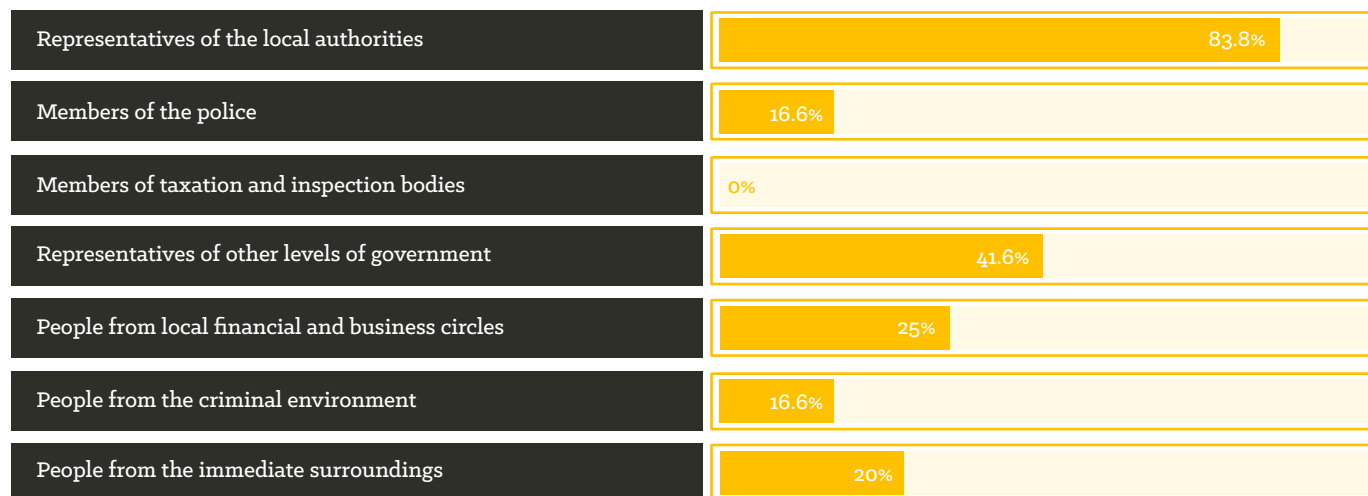
HAVE ANY OF YOUR ASSOCIATES BEEN SUBJECTED TO THREATS, INSULTS OR ATTACKS AS A RESULT OF THEIR WORK AT YOUR MEDIA OUTLET?



IF YES, WAS THEIR SECURITY THREATENED, WHAT TYPE OF THREAT OCCURRED?



SOURCES OF PRESSURE/THREATS



Despite all of this, the small number of responses among the surveyed portals on questions regarding needs in the field of general security, as well as the fact that the respondents gave a low assessment of the importance of this topic, shows that security issues do not represent a serious problem for most local portals in both countries.

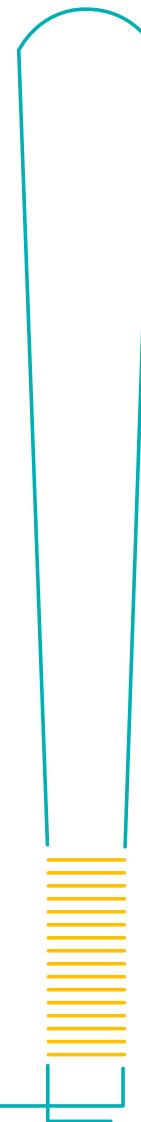


NATIONAL TOPICS ARE SOMETIMES EASIER TO WRITE ABOUT

“”

“Journalists are sometimes afraid to sign their articles, finding it much easier to decide to write about a topic that is taking place at the national level than at the local level, as such texts result in a much more intense reaction from the environment.”

(Ana Marković, chief editor of *Info zona*, Split, Croatia)



Conclusion

The position of local media outlets, the conditions under which they operate and the perception of the importance of those conditions by the publishers and editors themselves, in Serbia and Croatia, are marked by certain similarities and differences. Among some of the most significant similarities, we would primarily note a fact that relates to the profile of the media; most of the surveyed portals in Croatia and Serbia identify themselves as “a site that regularly publishes news, information and other content, principally its own production, on the basis of decisions taken by the chief editor or editorial board”. In both countries, local portals are marked by a low number of persons regularly engaged in work on the sites, which on average moves within a range of five to six people. On average, only half of that number accounts for permanently employed or engaged associates who perform journalistic (editorial) work. In both countries, there is still a relatively high number of portals that function as a “One-Man Band”.

Finish

XVI

Chapter >

Croatia and Serbia also share similar indicators that relate to the experiences of the journalists and editors of local portals. In both countries, there is a sharp divide between those with less than five years of experience and those with experience lasting for more than 15 years. In Serbia, and especially in Croatia, there is a relatively high number of portals whose editors began amassing their journalistic experience in the role of editor of the internet portal. In both countries, editors without experience don't think that they need help in their work and in mastering journalistic skills and techniques: the need for editorial training was rated, in both Croatia and Serbia, the second lowest average among all the types of trainings offered within the survey answers.

Apart from the aforementioned, local portals in the two countries share a common characteristic of large workloads of journalists. The surveyed media portals in both countries see the biggest challenge to the production of media content in a lack of money and lack of contributors. It is also evident that respondents in both Serbia and Croatia are dissatisfied with the way funds are allocated for the media from the public budget. Respondents in Serbia are somewhat more critical in evaluating ways of distributing money in their country, and 20 respondents gave the lowest rating to the way in which the Republic of Serbia supports the media financially.

A disturbing similarity between the situation in the two countries can also be found in the high exposure to various forms of violence against journalists. Over half of the portals reported that journalists or outlets had been the victims of some form of threat to their security, with Serbia having a slight lead. The majority of the portals that experienced threats in both Serbia and Croatia stated that they had experienced those threats at the hands of representatives of local authorities, while journalists of 14% of the surveyed media outlets in Croatia and 10% in Serbia have been victims of physical attacks.

Among the most significant identified differences between the situation for local portals in Serbia and Croatia, we would primarily emphasise the much better financial situation of those in Croatia, although they also often highlight their unfavourable economic situation.

A characteristic of the surveyed media in Serbia is that a large part of them (67%) have a dominant source of revenue, which contributes more than 50% to their budget. In Croatia, a dominant source of income exists in a slightly smaller percentage, but still accounts for more than half of those surveyed. Unlike Serbia, where most of those surveyed depend primarily on public funds, in Croatia revenue coming from commercial sources is increasingly dominant.

In both Croatia and Serbia, local portals link their unsatisfactory financial situation to the local surroundings. The difference between the two countries is evident in the fact that in Serbia the focus is placed on the small number and financial powerlessness of local advertisers, as well as their lack of understanding for the significance of the online sphere, while in Croatia the source of the problem is more often placed in inadequate funding by the local community, where answers focus on incentives, donations, grants and material assistance.

Apart from these important differences belonging to the business environment, local portals in Croatia and Serbia also differ in terms of some features related to their professional and personnel composition. It is notable, for example, that the chief editors of Croatian portals, with an average of over 24 years of journalistic experience, are considerably more experienced than their counterparts in Serbia, where the average total journalistic and editorial experience is 15 years.

The most significant differences observed are, thus, related primarily to business opportunities and the impact of external circumstances on them. They are probably largely a consequence of public media policies that are implemented in Serbia and Croatia. In Serbia, the Strategy for the Development of the Public Information

System has been in effect since 2011, and with the amending of media legislation in 2014, the basic mechanism for budgetary financing of media content has been systemically defined. Our survey data show that this system has generally not enabled local portals to have favourable working conditions, and that this is probably why it has a low rating among their editors and publishers.

In Croatia there is no existing strategic document that would determine the policy of public informing, while models for the budgetary funding of the media are often introduced, changed and cancelled following changes in the political arena. Local portals are, thus, mostly excluded from systemic public funding, which is why they are slightly more dependent on the commercial sector than their counterparts in Serbia.

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