

# #ReForMediaMKD

## PROGRAMME DIVERSITY OF THE MOST INFLUENTIAL TV-CHANNELS IN MACEDONIA, CROATIA AND SLOVENIA

Skopje, 2017



PROGRAMME DIVERSITY OF THE MOST INFLUENTIAL TV-CHANNELS IN  
MACEDONIA, CROATIA AND SLOVENIA



Publisher: Macedonian Institute for Media

For the publisher: Biljana Petkovska, Director

Authors: Vesna Nikodinoska, Marina Tuneva and Slavco Milenkovski

Expert Reviewer: Brankica Petkovic, Peace Institute, Ljubljana, Slovenia

Translator: Martina Kimovska

Design and print: Vinsent Graphics

This analysis is prepared in frames of the project #ReForMediaMKD – Citizens, CSOs and Institutions Reforming Media in Macedonia, which is implemented by the Macedonian Institute for Media and the Peace Institute in Ljubljana. The Project is financed by the European Union.

The project is funded by the European Union.



The contents of this document is sole responsibility of the Macedonian Institute for Media and can in no way be taken to reflect the views of the European Union.

# COMPARATIVE ANALYSIS OF THE COMMERCIAL TERRESTRIAL TV-CHANNELS ON NATIONAL LEVEL

## PROGRAMME DIVERSITY OF THE MOST INFLUENTIAL TV-CHANNELS IN MACEDONIA, CROATIA AND SLOVENIA

*Authors: Vesna Nikodinoska, Marina Tuneva and Slavco Milenkovski*

### 1. INTRODUCTION

The largest commercial terrestrial TV-channels on national level in Macedonia continue to represent a dominant source of information for the audience; hence, they continue to exert the greatest influence on the public opinion. Therefore, on one hand, it imposes expectations that the programme they offer to the viewers should reflect quality and diversity of content, and at the same time, it should set high standards for practitioners working in TV-channels, but on the other hand, they should promote democratic values and professional principles,<sup>1</sup> so as to advance the development of the broadcasting industry. The quality of the media content is not an obligation explicitly regulated by law; however, the national commercial TV-channels, as the most viewed and the most influential, are expected to show a sense of social responsibility and work for the public interest, since they themselves are users of public resources.

Under free market conditions, the competition with quality content should serve as additional stimulation to the rivalry in the broadcasting area and as “bait” for attracting advertisers. That is in accordance with the goals contained in the media regulation aimed at promoting media development, such as, introducing the incentives for independent production, creative work, educational and scientific opus, fostering of cultural identity, encouragement of competition in the audio-visual sphere, as well as the development of the economy.<sup>2</sup>

The programme content of the major commercial TV-channels with national coverage in Macedonia, TV Sitel, TV Kanal 5, TV Alsat-M, TV Telma and TV Alfa, is dominated by entertaining and news content, which generally complies with the mainly entertaining and general format according to which they have received their broadcasting licenses. Some of them are by far the most viewed by the audience and they lead multiple times in comparison to the audience share of the remaining TV-channels. According to the Draft -Strategy for Broadcasting Sector, drafted by the regulatory body in 2012, as part of that format, “they can create their programme scheme with no restrictions whatsoever, and make editorial decisions about its implementation”.<sup>3</sup> However, “terrestrial TV-channels broadcasting at the national level offer a very similar programme with predominantly entertaining content, among which the ‘light’ entertainment’(TV serials and soap operas), prevail”.<sup>4</sup> This conclusion of the former Broadcasting Council<sup>5</sup> given in 2012 is entirely valid even today. In the past few years, on most of the TV-channels, the audience has been

<sup>1</sup> Law on Audio and Audiovisual Media Services, 2013, Art. 61.

<sup>2</sup> Ibid., Art. 2.

<sup>3</sup> BC, Draft-Strategy for the Development of the Broadcasting Activity in the Republic of Macedonia 2013-2017, BC, Skopje, 2012. Available at: <http://avmu.mk/images/stories/Predlog-Strategija-i-Akciski-plan.pdf>. Pg. 26.

<sup>4</sup> BC, Draft-Strategy for the Development of the Broadcasting Activity in the Republic of Macedonia 2013-2017, BC, Skopje, 2012. Available at: <http://avmu.mk/images/stories/Predlog-Strategija-i-Akciski-plan.pdf>. Pg. 26.

<sup>5</sup> According to the new Law on Audio and Audiovisual Media Services (2013) the Broadcasting Council is transformed into an Agency for Audio and Audiovisual Media Services.

watching a pretty monotonous and unattractive programme offer, which does not differ substantially from one channel the other (with rare exceptions). Actually, there is no programme or channel that stands out for its quality, originality and diversity in the genres. The programme schemes of the most viewed TV-channels predominantly “revolves” around series produced in Turkey, as well as entertainment and music shows produced in Serbia, broadcasted in prime time. There is absence of television trivia and game show franchises, or in-house produced quizzes, as the quality of the domestic production is pretty low and it is usually not broadcasted during prime time. This invasion of trivial entertaining content ousts all attempts of other TV-channels trying to offer something different.

In order to get a complete picture of the program diversity of the TV channels, it is necessary to analyze the news programmes as an integral part of the television offer. Through the news programmes, among other, the TV-channels exert their influence and gain the trust of the audience. The news programme is the foundation for determining the level of journalistic professionalism of the commercial TV-channels in Macedonia, and simultaneously, it reflects their political orientation.

There is no commercial TV channel in Macedonia with a predominantly general, educational or specialized format, which can have an educational, informative or an entertaining function.<sup>6</sup> However, analyses of the Agency for Audio and Audiovisual Media Services have demonstrated that there is room for “the entry of a new TV channel that could offer a programme concept with different programme content”<sup>7</sup> compared to the already broadcasted programmes. The television offer is limited when it comes to diverse documentaries and educational programmes. The concern expressed in the 2012 Draft-Strategy drafted by the regulatory body that “there is a lack of domestically produced programs, first and foremost, feature films/TV series and programmes for children; and that the programs which meet the educational function have been reduced to a minimum”,<sup>8</sup> is still relevant, even five years since the adoption of this document.

But, what should that new TV-channel offer, what could be different in terms of the format and quality of what the Macedonian audience has been watching on their TV-sets in the past ten years? Or rather, what should the existing TV channels incorporate in their broadcasting programme to increase the quality and originality, and at the same time meet the commercial and public interest of the audience? Has the overwhelming Serbian, Turkish and Indian production truly met the requirements of the audience, or is it that the audience actually “has nothing else to watch”?<sup>9</sup>

The goal of this analysis is to make a comparative overview of the programme schemes, including news editions of the commercial terrestrial TV-channels on national level in Macedonia, Croatia and Slovenia. Croatia and Slovenia were selected for comparison because of the diversity of the programme offer that some of the TV channels have in these countries. The most influential TV channels in Slovenia, such as POP TV and Kanal A, and Nova TV and RTL in Croatia, have the highest ratings and viewership, create innovative and quality programme content, many of which are domestic production programmes.

This text complements the analysis on “The ownership and financial models of the most influential TV-channels in Macedonia, Croatia and Slovenia”, and they are both a part of the project “#ReForMediaMKD – Citizens, CSOs and Institutions Reforming Media in Macedonia”. The research, which was conducted in the period between October 2016 and March 2017, used secondary data obtained from relevant sources in all three countries. In addition to that, research, analyses, reports and other publications of relevant

<sup>6</sup> The television programme services can have a: 1) general format (the programme meets all three media functions or have a predominantly a generally educational format, a generally informative format or a generally entertaining format) and 2) specialized format (an educational function, an informative function, or an entertaining function).

<sup>7</sup> AAVMS, *Studija za utvrđivanje na opravdanosta za objavivanje javen konkurs za dodelivanje dozvola za televizijsko emitovanje na drzavno nivo*, AAVMS, Skopje, 2016. Available at: [http://avmu.mk/images/Studija\\_za\\_utvrđivanje\\_na\\_opravdanosta\\_za\\_javen\\_konkurs\\_\\_04.11.2016.pdf](http://avmu.mk/images/Studija_za_utvrđivanje_na_opravdanosta_za_javen_konkurs__04.11.2016.pdf). Pg. 54.

<sup>8</sup> BC, *Draft-Strategy for the Development of the Broadcasting Activity in the Republic of Macedonia 2013-2017*, BC, Skopje, 2012. Available at: <http://avmu.mk/images/stories/Predlog-Strategija-i-Akciski-plan.pdf>. Pg.7.

<sup>9</sup> Pavlovska, J., „Pomina vremeto na Sheherezada i Ali Riza“, *Utrinski vesnik* daily, 21 June 2012. Available at: <http://www.utrinski.mk/default.asp?ItemID=648E3422D13FF4499DE19A7F63A003CE&commentID=481943&pLikeVote=0>.

national and European media organizations were consulted. Interviews were conducted with media experts and representatives of the television industry in Macedonia (3), Croatia (4) and Slovenia (2). Data were collected also from relevant institutions, regulatory bodies, ministries, research agencies and media in all three countries.

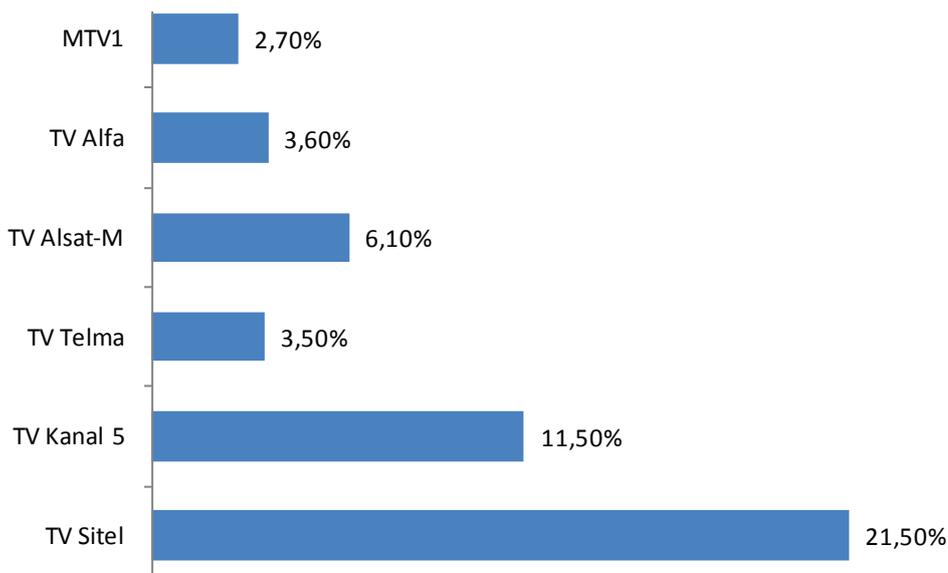
## 2. MACEDONIA: MONOTONOUS AND UNATTRACTIVE PROGRAMME OFFER

Most of the commercial terrestrial TV-channels on national level in Macedonia have similar broadcasting programme schemes, in which **the most popular content** are the soap operas, mostly produced in Turkey and the entertainment music shows produced in Serbia. The most common explanation that the people working in the TV-industry give with respect to this “invasion” of Turkish series and Serbian entertainment shows are a cheap way of attracting the audience, and that they boost ratings, i.e. keep the ratings of the media on a steady level.

*“The financial standing of the commercial terrestrial TV-channels on national level in the country is unfavourable because of their considerable number and the fact that they are fighting for the same audience and the same budget... In that respect, it is difficult to achieve the quality expected from a national TV channel, which does not justify the almost identical broadcasting programmes schemes, especially during prime time, and even less in some cases in the news reports. Therefore, other than in the context of the number of the TV-channels, we cannot speak about pluralism among the TV-channels. There are certain exceptions from the general rule and some TV-channels offer specialized programmes for specific target groups/.../ which is commendable. However, in general, the level of creativity is pretty much low”,* is the evaluation of Bisera Anastasijević, former director of TV Alsat-M and expert on issues related to the media market.<sup>10</sup>

After shutting down TV A1 in 2011, TV Sitel assumed primacy and became the TV channel with the highest ratings, with an audience share of 21.5%, followed by TV Kanal 5, with almost twice as less of an audience share 11.5% and TV Alsat-M with 6.1%. The difference in the ratings of TV Alfa and TV Telma could be represented in decimals.

**Chart 1: Audience share and ratings of the commercial terrestrial TV-channels on national level in Macedonia in the last quarter of 2016**



Source: Nielsen Audience Measurement Macedonia

<sup>10</sup> Interview with Bisera Anastasijević, former director of TV-Alsat M and expert on issues related to the media market, 8 February 2017.

The research showed that, in a period of one week of media monitoring in 2016, the entertainment programme dominated the five TV-channels with 62%, among which the most represented were the feature films/TV series, the music programme and the entertaining – informative programme. Educational programme was dominated by the documentary genre, the documentary-entertaining and the educationally-entertaining programme had 20% share in the programmes of the five TV-channels. The news programme share was 18%, mostly the news reports/central TV news editions and current affairs programmes.<sup>11</sup>

TV Sitel completely dominated on the list of the **10 most viewed programmes** of the commercial terrestrial TV-channels on national level in Macedonia in the last quarter of 2016. In addition to the four most viewed Turkish series, next on the top 10 list was the game show “Se ili nešto” (“Deal or No Deal”), an adapted foreign game show franchise, followed by the lottery TV draw “Novo Loto”, the animated comedy series “Ednooki”, and the central TV news edition “Dnevnik 1” as last on the list, all broadcasted on TV Sitel.

Despite the efforts of certain TV-channels to broadcast feature films/TV series from the latest foreign production, in the last quarter of 2016, among the ten most viewed programmes were the feature films Rambo 2 (1985) and Rambo 3 (1988).

**Table1: 10 most viewed programmes on the commercial terrestrial TV channels on national level in Macedonia in the last quarter of 2016**

Media	Programme/show	AMR %
TV Sitel	1. Series: “Paramparche” (Paramparca) (15.11.2016)	21.2%
	2. Series: “Ubavata selanka” (Guzel Koylu) (06.11.2016)	19.9%
	3. Series: “Crnata roza” (Karagul) (15.11.2016)	19.7%
	4. Series: “Zaboravi ako mozheš” (Unutulmaz) (20.11.2016)	19.5%
	5. Film: Rambo 3 (29.10.2016)	18.1%
	6. Quiz: “Se ili nešto”(Deal or No Deal) (30.11.2016)	16.0%
	7. Lottery TV draw : “Novo Loto” (05.11.2016)	15.9%
	8. Film: Rambo 2 (23.10.2016)	15.2%
	9. Animated comedy series: “Ednooki” (05.11.2016)	15.1%
	10. News programme: Dnevnik 1 (11.12.2016)	14.4%

Source: Nielsen Audience Measurement Macedonia

In the period when this research was conducted, the most popular programmes on TV Sitel were the Turkish series, and on TV Kanal 5 one Turkish series and an entertainment programme produced in Serbia, respectively. All top five most viewed programmes on TV Telma have an informative character, and TV Alfa had the greatest diversity on the top five list of most viewed programmes in the last quarter of 2016.

Similar to TV Sitel, the Turkish series in combination with the central and evening news editions, and not to forget the quiz show “Srekjni lugje” dominated the prime time on TV Kanal 5. In addition to the Turkish series “Ukraden zivot” (“O Hayat Benim”) which was the most viewed on Kanal 5 in the last quarter of 2016, the other popular programme was the Serbian Music Show “Dzvezdite na Grand” (“Zvezde Granda”), which aired on weekends. Almost identical was the programme offer of TV Alfa, where the prime time was

<sup>11</sup> AAVMS, *Studija za utvrđivanje na opravdanosta za objavuvanje javen konkurs za dodeluvanje dozvola za televizisko emituvanje na drzavno nivo*, AAVMS, Skopje, 2016. Available at: [http://avmu.mk/images/Studija\\_za\\_utvrđivanje\\_na\\_opravdanosta\\_za\\_javen\\_konkurs\\_04.11.2016.pdf](http://avmu.mk/images/Studija_za_utvrđivanje_na_opravdanosta_za_javen_konkurs_04.11.2016.pdf). Pg.18.

dominated by several series after the central news edition at 17.30. The Macedonian version of the popular TV show “Pekolna kujna” (“Hell’s Kitchen”) and the entertainment show “Backstage” were aired after 22.00.

The most viewed programmes on TV Alfa were the central news editions, the Serbian feature film “Ivkova slava”, the quiz show “Krug na znaenje”, the Turkish series “Raneto srce” (“Fatih Harbiye”), and the TV Alfa in-house production, i.e. the series “Komšiski prikazni”.

TV Alsat-M, which is the only commercial terrestrial TV channel broadcasting in Macedonian and Albanian, is not lagging behind with the quantity of soap operas, mostly Turkish. However, this TV channel partially stands out of the usual “scheme”, therefore, two news editions and the debate programme “Patotkon...” (“Rruga drejt...”) were among the top five programmes on the top five list of most viewed programmes.

TV Telma, as the only one not broadcasting series produced in Turkey, stands out in the segment of commercial terrestrial TV-channels on national level. This television introduced certain novelties in the programme by introducing the debate show “Top Tema”, which has been aired every working day. In this way, they tried to fill the gap created by the lack of debates, and by presenting opposing views and positions they tried to overcome this long-standing problem in the media sphere in Macedonia. In the last quarter of 2016, all top five programmes of this TV-channel had an informative character (news editions and debate shows).

**Table 2: Top five programmes on the five commercial terrestrial TV channels on national level in Macedonia in the last quarter of 2016**

	TV Sitel	TV Kanal 5	TV Telma	TV Alsat-M	TV Alfa
Top viewed programmes in the last quarter of 2016	"Paramparche" (Paramparca) (Turkish series) (15.11.2016)"	"Ukraden zhivot" (O Hayat Benim) (Turkish series) (12.10.2016)"	"Top tema (31.10.2016)"	"News edition in Albanian at 19.00 (13.12.2016)"	"News edition at 17.30 (30.10.2016)"
	"Ustavata selanka" (Guzel Koylu) (Turkish series) (06.11.2016)"	"Dzvezdite na Grand" (Zvezde Granda) (entertainment programme, Serbian production) (24.12.2016)"	"Parlamentarni izbori – otvoreno (Parliamentary elections – open) (election day reporting) (11.12.2016)"	"Me fal" (Turkish series) (22.12.2016)"	"Ivkova slava" (Serbian film) (31.12.2016)"
	"Crnata rozga" (Karagul) (Turkish series) (15.11.2016)"	"News edition at 15.00 (25.12.2016)"	"News edition at 15.00 (21.12.2016)"	"Fete te lidhura" (Turkish series) (22.12.2016)"	"Krug na znaenje (quiz show) (08.12.2016)"
	"Zaboravi ako možeš" (Unutulmaz) (Turkish series) (20.11.2016)"	"Dzvezdite na Grand – Special" (Zvezde Granda – Special) (entertainment programme, Serbian production) (13.11.2016)"	"Top tema na vaša strana" ("Top tema on your side") (debate programme) (30.11.2016)"	"News edition at 16.00 (15.11.2016)"	"Raneto srce" (Fatih Harbiye) (Turkish series) (08.12.2016)"
	"Rambo 3 (Film) (29.10.2016)"	"Zevzekmanija" (entertainment programme, domestic production) (26.11.2016)"	"News edition at 18.30 (12.12.2016)"	"Patot kon... (Ruga drejt...) (debate programme) (30.11.2016)"	"Komšiski prikazni" (domestic production series) (13.11.2016)"

Source: Nielsen Audience Measurement Macedonia

## 2.1 Scarce domestic production vs. "invasion" of turkish series

The wave of Turkish series started with TV A1, by broadcasting the extremely popular "1001 nokj" ("Bin bir gece"), however, with the closing of TV A1 in 2011, TV Sitel и TV Kanal 5 only took over the "recipe" for success when it comes to attracting viewers. The "inventiveness" of the programme directors goes so far as to place the latest details about the series in the ticker tape of the running programme. The TV-channels compete among each other even by airing some of the most popular series in prime time during the broadcasting of the news editions on their competition TV-channels.

"Could the Turkish production make as many series as the Macedonian TV-channels (predominantly Sitel and Kanal 5) could manage to 'squeeze' into their programme scheme? Actually, the more appropriate question would be, could the day last so long as to view all the Turkish series that enter each other's peak period in the evening rush hour slot?",<sup>12</sup> asks Jasminka Pavlovska in her 2012 commentary in Utrinski vesnik daily. Although the text this quote has been taken from suggested that the viewers had been swamped with Turkish series, five years later, one gets the impression that the broadcasting programmes schemes of the most viewed TV-channels have hardly "evolved" a single step in the direction of the Serbian music and entertainment shows, mostly produced by Grand or Pink. The ratings data contradicts the claim that the Turkish series are long past their prime.

<sup>12</sup> Pavlovska, J., "Pomina vremeto na Sheherezada i Ali Riza", Utrinski vesnik daily, 21 June 2012. Available at: <http://www.utrinski.mk/default.asp?ItemID=648E3422D13FF4499DE19A7F63A003CE&commentID=481943&pLikeVote=0>.

*“/.../ The quality [of the programme offer] has been declining in the past few years since the closing of A1 in 2011, which showed different types of programmes, many of which were domestic productions, franchise shows, such as, “Koj saka da bide milioner” (“Who wants to be a Millionaire”), “Trkalo na srejkata” (“Wheel of Fortune”), “Idol” /.../ The next step should have been the feature film/TV series production, however, that idea was never realized. In the meantime, in the path of least resistance and with the shortage of financial, logistic and production capacities, the other national TV channels leaned towards competing which of them would air the best Turkish series. TV A1 was the first to start with the dubbing of the series and we are fighting the same fight, it seems as if we are still stuck in that period of 10 years ago,”* said Darko Peruševski, former programme director of the now closed TV A1.<sup>13</sup>

Moreover, in the research conducted for the purpose and at the request of the Agency for Audio and Audiovisual Media Services for determining the justification for advertising an open competition for awarding a license to TV channel on national level, more than half of the subjects included in the research (54%) were happy with the what the domestic TV programmes had to offer, and only 14% were not happy.<sup>14</sup> However, 86% of the subjects included in the research believed that the TV-channels should enrich their programme content, starting with the domestic production, feature films/TV series, educational and informative programmes, and the audience was overwhelmed with political programmes and TV series.<sup>15</sup>

The same research demonstrated that there is room for opening a new commercial TV channel which would predominantly have a generally educational or specialized format, and which would enhance the current programme offer/broadcasting programme and accommodate the requirements of the audience. Such an attempt was already performed with the opening of TV Alfa which, at the beginning in 2008, had ambitions to offer a different programme concept, with higher technical, personnel and programme standards,<sup>16</sup> however, later on it moulded into the pretty unified programme “scheme”, as the other commercial terrestrial TV-channels on national level.

According to the same research the TV industry in Macedonia is characterized as a market with a high concentration, saturated by the large number of TV-channels, where the dominant share is held by five televisions.<sup>17</sup> On one hand, the opening of a new TV channel does not go in favour of the “rationalization of the number of TV-channels”, which might result in an improved economic standing of the media subjects on the market, and their improved qualitative performance. But, on the other hand, the entry of a new TV channel on the market offering new and original medial product, opens opportunities for a possible qualitative progress in comparison to the current television offer.

**The domestic production** has a long and tedious history with the national commercial TV-channels in Macedonia. They neither have sufficient financial, production and managerial capacities, nor do they have the interest for domestic production. In addition, the quality of what is already produced is pretty low. Still, the mechanism for co-financing the production of the domestic feature films/TV series or documentaries by the state introduced in 2014,<sup>18</sup> did not contribute to the increase in the quality of the domestic programme, taking into consideration the fact that several TV-channels produced versions of the popular Macedonian folk tales (“Makedonski narodni prikazni”) with the explanation that they were the cheapest to produce. *“/.../Not only are the financial resources insufficient to cover the cost of a high-quality production, they are insufficient period. Therefore the results, with a few noble exceptions, were (not) evident. /.../ Finally, this neither encouraged, nor did it help the domestic production, and the prime time remained designated for the foreign programme...”*, is the opinion of Anastasijević.<sup>19</sup>

<sup>13</sup> Interview with Darko Peruševski, former Programme Director of the now-a-days closed TV A1, 1 February 2017, Skopje.

<sup>14</sup> AAVMS, *Studija za utvrđivanje na opravdanosta za objavuvanje javen konkurs za dodeluvanje dozvola za televizisko emituvanje na drzavno nivo*, AAVMS, Skopje, 2016. Available at: [http://avmu.mk/images/Studija\\_za\\_utvrđivanje\\_na\\_opravdanosta\\_za\\_javen\\_konkurs\\_\\_04.11.2016.pdf](http://avmu.mk/images/Studija_za_utvrđivanje_na_opravdanosta_za_javen_konkurs__04.11.2016.pdf). Pg. 68.

<sup>15</sup> Ibid. Pg. 72

<sup>16</sup> Pavlovska, J., “TV Alfa startuva so nova novinarska generacija“, Utrinski vesnik daily, 2 June 2008. Available at: <http://www.utrinski.mk/?ItemID=4B2DBB0CA095D04C9A9A4FDB9DCC1EF8>.

<sup>17</sup> Ibid.

<sup>18</sup> In 2014, with the amendment to the Law (2013) submitted by the Government, the TV-channels were provided with the opportunity for funding the domestic documentary and feature film production in the amount of 50 percent of the total costs.

<sup>19</sup> Interview with Bisera Anastasijević, former Director of TV-Alsat M and expert on issues related to the media market, 8 February 2017.

Darko Peruševski mentioned the series “Prespaf”, partially co-financed from the state budget<sup>20</sup> and broadcasted on TV Telma, as something refreshing on the air and a “certain direction to follow in the future”, even though the afore-stated series is not among the top five most viewed shows on TV Telma. “However, our TV-channels do not have the production and managerial capacity to make that move. If they had, they would have done it by now. I think that currently, with this ownership structure, there is no one to lead them forward”, adds Peruševski.<sup>21</sup>

From the domestic feature film/TV series production co-financed from the state budget, only the series “Komšiski prikazni”, which airs on TV Alfa, is among the top five. With the exception of the animated series “Ednooki” and the quiz show “Se ili nishto” (“Deal or No Deal”) broadcasted on TV Sitel, there are no other domestically produced programmes on the top ten list of most viewed programmes in the last quarter of 2016. The situation is similar with all TV-channels, where the domestic production series rarely appear among the top five viewed programmes, as is the case with the satirical show “Zevzekmanija” on TV Kanal 5.<sup>22</sup>

## 2.2. News programmes: insignificant viewership and significant bias in the news

All five commercial terrestrial TV-channels on national level in Macedonia broadcast **the news editions**, which in most cases are skilfully intertwined with the series that consecutively end and begin, during prime time. “/.../ If you want the people to watch your news edition, regardless of whether they are independent, professionally done or calibrated to the propaganda of a certain political party, you need to ‘tie them’ to the television set,”<sup>23</sup> states Zoran Dimitrievski, experienced editor, in his comment for the Media Fact Checking Service. This is the manner in which the TV-channels increase the viewership of the central news programmes broadcasted in prime time.

The news editions of the most viewed television TV Sitel is not on the top five list of the most viewed programmes in the last quarter of 2016. Still, one of the TV Sitel news editions, more specifically, the news edition Dnevnik 1 on the day of the Parliamentary elections, 11 December 2016, came in last among the ten most viewed programmes of all five TV-channels in the researched period. In contrast to all other TV-channels, the top five most viewed programmes on TV Telma in the researched period were informative: the debate programme “Top tema na vaša strana” (“Top tema on your side”), “Parlamentarni izbori – otvoreno” (“Parliamentary elections – open”) and the news edition. This is partially due to the fact that the researched period coincided with the pre-election period of the Early Parliament elections held on 11 December 2016. The news editions both on TV Alsat-M (13 December 2016) and TV Alfa (30 October 2016) came in first among the top five most viewed programmes of these TV-channels, and the news edition of TV Kanal 5 (25 December 2016) was also among the top five most viewed programmes.

Still, one must bear in mind that the viewership of the news does not always reflect the trust of the viewers. One third of the respondents fully agreed or partially agreed with the statement “when I watch the TV news. I usually trust what I see”, 28% neither agreed, nor disagreed, and most of them, 36% disagreed or fully disagreed with the statement.<sup>24</sup>

The polarization of the Macedonian society along ethnic and political lines is reflected in the news. This is indicated in the assessment by Snežana Trpevska that “the most influential TV channels, which are still the main source of information, although aware of their role in the reconciliation and democratization, represent reality mainly from the stand point of their ethnic group, serving the interests of the patrons from their political parties, thus bolding the differences and stimulating resentment”.<sup>25</sup> This conclusion underlines the widespread political and business clientelism in the media content of the most viewed TV-channels.

In the course of 2016, unbalanced approach in reporting on major political actors mainly dominated

<sup>20</sup> The series “Prespav” also received funds from the European Union.

<sup>21</sup> Interview with Darko Peruševski, former Programme Director of the now-a-days closed TV A1, 1 February 2017, Skopje.

<sup>22</sup> The ratings of the most watched programmes were made in primetime. There is a possibility for some of the domestic production programmes to appear on the most viewed lists, if the ratings referred to the total time.

<sup>23</sup> Dimitrievski, Z., “*Politicka propaganda vo pikanten programski sendvich*“, Media Fact Checking Service, 10 October 2014. Available at: <http://proverkanafakti.mk/politicka-propaganda-vo-pikanten-programski-sendvich/>.

<sup>24</sup> AAVMS, “*Istrazuvanje na mediumskata pismenost kaj vozrasnata populacija vo RM*“, AAVMS, Skopje, 2016. Available at: [http://www.avmu.mk/images/Istrazuvanje\\_na\\_mediumskata\\_pismenost\\_kaj\\_vozrasnata\\_populacija.pdf](http://www.avmu.mk/images/Istrazuvanje_na_mediumskata_pismenost_kaj_vozrasnata_populacija.pdf). Pg. 58.

<sup>25</sup> Trpevska, S., “*Ethnocentric coverage: Audiences comfy zone in Macedonia*“ in New Europe’s: Our World in 2017”,

the news reports of three national televisions.<sup>26</sup> That was particularly evident in the qualitative sense. With respect to the activities of the government and the ruling party, it was noticed that the reporting was favourable and in a positive context, while the opposition was usually presented in a negative context, or, at worst, demonized. An exception in the reporting was observed in two TV-channels that mainly had a balanced approach in reporting.<sup>27</sup> These TV-channels, mostly treated matters of public interest and had a neutral to critical reporting on the different aspects of the state institutions.<sup>28</sup>

The wiretapped conversations released by the opposition in 2015 revealed serious political influences in the news information programmes of some of the leading national TV-channels. The conclusion from the afore-stated conversations implies that the impact on the editorial policy was commonly manifested by arranged reports in the news programmes by senior government officials, especially in the pre-election period. Moreover, the conversations revealed that representatives of the government and chief TV editors and owners negotiated the manner of reporting certain events.<sup>29</sup>

### 3. CROATIA: VARIED DOMESTIC PRODUCTION, POWERFUL INFORMATIVE PROGRAMME AND A LOT OF ENTERTAINMENT

The largest commercial TV-channels in Croatia, RTL и TV Nova, are mainly focused on broadcasting feature films/TVseries and entertainment programmes, i.e. media content that attracts the advertisers, but at the same time they have very influential informative programmes. The broadcasting programme of Nova TV and RTL also includes soap operas, some of which are produced in Turkey. They also have high-quality domestic production. However, it is of crucial importance, that the two largest commercial televisions have the financial, technical and professional potential to offer different high quality content, both domestic and foreign production.

*"If you compare the programmes of the national commercial TV-channels, they are based on three main approaches - a powerful information programme, domestic TV series (telenovelas) and entertainment shows. Combined with foreign series and films, the Croatian [commercial] TV-channels have a quality programme. However, the quality of the programmes is under constant pressure to reduce the costs, which has resulted in the change of standards throughout the years,"*<sup>30</sup> says Ivan Lovreček, Deputy President of the RTL Television Management.

The projections of analysts suggest that the financial balance of some commercial TV-channels will still be maintained relatively well for a certain period of time; however, in the near future, it is likely that there would be a significant reorganization on the level of television production. *"Consequently, the revenue crisis, the decline in the employment of journalists and the added decline in the quality of content /.../ will soon transfer to the commercial televisions",*<sup>31</sup> claims Milan Živković, former media policy advisor in the Croatian Ministry of Culture.

The official data in Croatia show a significant audience share of the commercial terrestrial TV-channels that broadcast on national level. According to the Agency for Electronic Communications,<sup>32</sup> the first place in the list of the most viewed TV-channels for the last quarter of 2016 goes to Nova TV with an average audience share of 23.38%, followed by HTV 1 with 15.6%, and RTL with an audience share of 13.3% coming third. In comparison, according to the research of the agency IPSOS Puls<sup>33</sup> for 2016, Nova TV is the most viewed TV channel, followed by RTL.

<sup>26</sup> Institute for Communication Studies, "Reports from monitoring of the media content – MODEM", IKS, Skopje, 2016-2017. Available at: <http://respublica.edu.mk/modem-izvestai>.

<sup>27</sup> Institute for Communication Studies, "Reports from monitoring of the media content – MODEM", IKS, Skopje, 2016-2017. Available at: <http://respublica.edu.mk/modem-izvestai>.

<sup>28</sup> Ibid.

<sup>29</sup> Intercepted audio materials, "Bomba 4" related to the phone tapping of journalists and "Bomba 24" related to the media. Available at: <http://prizma.birn.eu.com/мк/стории/комплетен-материјал-од-сите-33-бомби-на-опозицијата>.

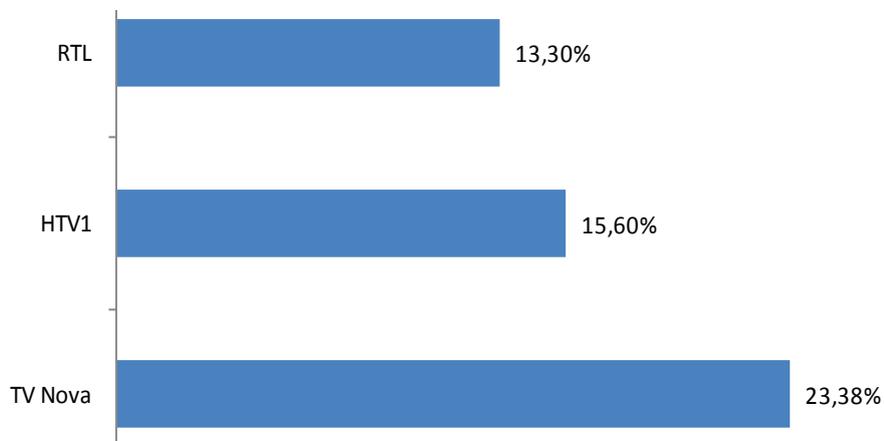
<sup>30</sup> Interview with Ivan Lovreček, Deputy President of the RTL Television Management, 13 February 2017.

<sup>31</sup> Interview with Milan Živković, former media policy advisor in the Croatian Ministry of Culture, 9 February 2017.

<sup>32</sup> The data was provided to the Agency for Electronic Media by AGB Nielsen and represent the general population of the Republic of Croatia over the age of four, and they refer to the daily audience share/ratings/viewership. Available at: <http://www.e-mediji.hr/hr/analiza-gledanosti-televizijskog-programa-u-hrvatskoj/gledanost-televizijskih-kanala-u-hrvatskoj-u-2016/>.

<sup>33</sup> The research was conducted in December 2016, on a representative sample of 1.000 people (viewers). Available at: <http://www.e-mediji.hr/hr/pruzatelj-i-medijskih-usluga/istrazivanja-i-analize/istrazivanje-pokazalo-gledatelji-zele-vise-filmova-i-dokumentaraca/>.

**Chart 2: Audience share of the commercial terrestrial TV-channels on national level in Croatia in the last quarter of 2016<sup>34</sup>**



Source: AGB Nielsen Croatia

Nova TV's entertainment show "Tvoje lice zvuči poznato" ("Your face sounds familiar"),<sup>35</sup> holds first place on the list of **the most viewed programmes of the commercial TV-channels** in the last quarter of 2016, according to the analysis published on the web-page of the Agency for Electronic Media,<sup>36</sup> which is followed by Nova TV's central news edition at 19:15. The list of the most viewed programmes in the October-December 2016 also contained the reality show "Farma",<sup>37</sup> in December, it was the Turkish drama series "Sudbina" ("Kader"), and in November, the comedy show "Lud, Zbunjen, Normalan",<sup>38</sup> all of them broadcasted on Nova TV.

<sup>34</sup> The data was provided by AGB Nielsen and represent the general population of the Republic of Croatia over the age of four.

<sup>35</sup> This is the Croatian version of the word famous reality TV show "Your face sounds familiar". The format is similar to the Dutch television series "Soundmixshow", which was broadcasted for the first time in Spain under the title "Tucamesuena" in 2011. Since then, 37 versions of the series have been produced on a global level.

<sup>36</sup> Agencija za elektronicke medije, *Analiza gledanosti televizijskog programa u Hrvatskoj*, AEM, 2016. Available at: <http://www.e-mediji.hr/hr/analiza-gledanosti-televizijskog-programa-u-hrvatskoj/>.

<sup>37</sup> "Farma" is the reality TV show from the Croatian production introduced in 2008.

<sup>38</sup> This is a Bosnian television comedy which started broadcasting in 2007. After its premiere, it started broadcasting in Serbia, Macedonia, Montenegro, Croatia and Slovenia.

**Table 3: 10 most viewed programmes on the commercial terrestrial TV channels on national level in Croatia in the last quarter of 2016**

Media	The most viewed shows in October-December 2016	AMR %
Nova TV	1. Entertainment programme: "Tvoje lice zvuči poznato" (December 2016)	19,44
	2. Nova TV central news edition (December 2016)	19,27
	3. Entertainment programme: "Tvoje lice zvuči poznato"(November 2016)	19,04
	4. Entertainment programme: "Tvoje lice zvuči poznato"(October 2016)	18,49
	5. Central news edition (Dnevnik) 19:15 (October 2016)	18,18
	6. Series: "Sudbina" (Kader) – (December 2016)	17,72
	7. Central news edition (Dnevnik) 19:15 (November 2016)	17,29
	8. Reality show:"Farma"(December 2016)	17
	9. Reality show: "Farma"(November 2016)	16,66
	10. Reality show: "Farma" (October 2016)	16,16

Source: Analysis of the audience of the TV programmes in Croatia conducted by the Agency for Electronic Communications in cooperation with AGB Nielsen

Although the most watched shows in the research period were mostly domestic production, Croatia's two largest commercial TV channels, Nova TV and RTL, also have a rich film and entertainment foreign production content in their programme offer. *"The conglomerates behind the media have the right to broadcast non-exhaustive catalogue of the most successful feature films and TV shows, therefore the programme of the national commercial TV-channels in Croatia is on a highly professional technical level,"*<sup>39</sup> explains Živković.

Since its beginnings, Nova TV based its broadcasting programme on domestic production shows, at the same time purchasing the rights to programmes and quality foreign production. The television particularly invests in the development and application of the new media and integrated communications. Actually, it works as a multimedia platform integrating television and the online operations. In addition to the Nova TV channel, Nova TV Group owns several other TV-channels (Doma TV, Nova World и Mini TV), as well as the on-line news portal ([www.dnevnik.hr](http://www.dnevnik.hr)), several thematic portals (the sports portal -[www.gol.hr](http://www.gol.hr), the lifestyle portal – [www.zadovoljna.hr](http://www.zadovoljna.hr) and [www.punkufer.hr](http://www.punkufer.hr), as well as the portal for new media and technology [www.Zimo.co](http://www.Zimo.co)), and the blogging service [www.blog.hr](http://www.blog.hr), as well as OYO – the first Internet service, enabling the viewers to watch video-on demand content ([www.webtv.novatv.hr](http://www.webtv.novatv.hr)). Nova TV has initiated domestic projects, and the documentary programme "Trage" ("Traces"), on topics related to mysterious and serious crimes that happened in Croatia.

RTL, on the other hand, pays special attention to developing mechanisms for communicating with the viewers, such as, exchanging files and certain video content with its audience. It is the only television in Croatia which integrates the concept of citizen journalism and publishes User Generated Content (UGC) in its work. *"I believe that the developing potential of the media lies first and foremost in the adaptation of all media to the new digital platforms,"*<sup>40</sup> underlines Lovreček.

<sup>39</sup> Interview with Milan Živković, former media policy advisor in the Croatian Ministry of Culture, 9 February 2017.

<sup>40</sup> Interview with Ivan Lovreček, Deputy President of the RTL Television Management, 13 February 2017.

**Table 4: Top five programs on TV Nova, Croatia, in last quarter of 2016**

	<b>Нова ТВ</b>
<b>Most viewed programmes (last quarter of 2016)</b>	“Tvoje lice zvuči poznato” (entertainment programme)
	Central news edition (informative programme)
	“Farma” (reality show)
	“Provjereno” (informative programme)

Sources: CME web-page<sup>41</sup>

According to the data provided by CME for the last quarter of 2016,<sup>42</sup> the leading programmes on the Croatian market were: the entertainment show “Tvoje lice zvuči poznato” (“Your face sounds familiar”) with 38% audience share, Central news edition (30%), while “Farma” and the informative programme “Provjereno” (“Confirmed”)<sup>43</sup> have an equal audience share (26%).

In 2016, the most viewed programme on RTL television was the Male World Handball Championship, with 21 broadcasted matches and an average audience share of 28%, while the match between Croatia and Spain reached an audience share of 55%. The show “Ljubav je na selu” was a hit in the spring and autumn season (30.1%, and 25.5%, respectfully), while the Central news edition, RTL Today (RTL Danas), had an average audience share of 20%.<sup>44</sup>

Both, Nova TV and RTL were among the national channels with the best grades, according to the “overall general impression” left on the viewers, while the public HTV service left the worst impression according to the research of the television programme viewing habits conducted for the Agency for Electronic Media.<sup>45</sup> The feature films/TV series and documentary programmes were the most preferred and evaluated as the programme content with the highest quality by most of the respondents, who at the same time stated that their least preferable content were the Turkish series and reality shows (as well as the children’s programmes, which was expected taking into consideration the population targeted in the research).<sup>46</sup>

### **3.1. Quality content under the pressure of commercialization and tabloidization**

The problems with the transition are still visible in the media field, which is reflected on the **content quality** and fulfilment of the public interest. According to Zrinjka Peruško, in Croatia “there is a general agreement that in commercial media, the undue influence of owners is a far greater risk for the independence and freedom of reporting than state influence. The general trend of ‘tabloidization’ is evident in the press and in broadcasting, a result of market pressures and increased commercialisation.”<sup>47</sup>

<sup>41</sup> CME web-page. Available at: [http://s2.q4cdn.com/384102709/files/doc\\_presentations/2017/Q4-2016-Investor-Presentation\\_final.pdf](http://s2.q4cdn.com/384102709/files/doc_presentations/2017/Q4-2016-Investor-Presentation_final.pdf). Pg. 14.

<sup>42</sup> CME, “2016 Investor Presentation”, CME, 2016. Available at: [http://s2.q4cdn.com/384102709/files/doc\\_presentations/2017/Q4-2016-Investor-Presentation\\_final.pdf](http://s2.q4cdn.com/384102709/files/doc_presentations/2017/Q4-2016-Investor-Presentation_final.pdf).

<sup>43</sup> TV magazine “Provjereno” (“Confirmed”) started broadcasting in 2007, is focused on the most important social and political matters in Croatia through investigative journalism.

<sup>44</sup> RTL, “Annual report 2016”, RTL Group, 2016. Available at: [http://www.rtlgroup.com/files/pdf2/rtl-group-annual-report-2016\\_online.pdf](http://www.rtlgroup.com/files/pdf2/rtl-group-annual-report-2016_online.pdf). Pg. 79.

<sup>45</sup> AEM, *Navike gledanja televizijskih programa*, AEM, 2016. Available at: <http://www.e-mediji.hr/hr/pruzatelji-medijskih-usluga/is-trazivanja-i-analize/istrazivanje-pokazalo-gledatelji-zele-vise-filmova-i-dokumentaraca/>.

<sup>46</sup> Ibid.

<sup>47</sup> Zrinjka Peruško, *Assessment of Media Development in Croatia*, Paris, UNESCO, 2011.

This does not comply with one of the special goals provided in the National Cultural Development Strategy of the Republic of Croatia by 2020<sup>48</sup> in the area of the media. According to this document, the commercial media should increase their public responsibility and the domestic production of content, in order to ensure sustainable financing and less dependence on market conditions, while retaining independence from the state and local authorities. Therefore, Viktorija Car recommends that “/.../ we need mechanisms for assessing the quality and diversity of the media, which is a public interest”.<sup>49</sup>

The Croatian media sphere is facing fierce criticism due to the strong influence of the **commercialization process**, which leads to an insufficient promotion of the national culture and social values by the commercial broadcasters. Consequently, the commercial media have less interest in publishing audience relevant content. “*Their goal is to increase the advertising revenue and promote the consumer culture*”, states the research conducted by Paško Bilić and Nada Švob-Đokić.<sup>50</sup>

As a result, the commercial content replaces other high-quality content. “*Nova TV and RTL broadcast soap operas which replace the quality domestic series broadcasted on HRT. For example, Nova TV is broadcasting a Turkish soap opera before its Central news edition (Dnevnik) at 19:15, and other Turkish series from 20.00. Whatever the other TV-channels broadcast at that time is destined to fail*”, believes Tena Perišin, journalist and professor of television journalism at the University of Zagreb.<sup>51</sup>

The domination of the imported programmes also creates problems for the **domestic production**, which should legally be represented with at least 20% in the daily programme, out of which at least 50% between 16.00 and 22.00 hours.<sup>52</sup> “*The Croatian filmmakers’ hope that the arrival of foreign media conglomerates on the domestic market will increase the need for their involvement unfortunately did not materialize. According to the claims of independent TV producers, it appears that the commercial television broadcasters avoid their obligation under the Law and the Directive on Audiovisual Services to order part of their programme from the independent production, by creating their own production segment, i.e. by placing their production activities in separate companies,*”<sup>53</sup> explains Živković.

### 3.2. News programmes: the news as a ground for competition between the tv-channels

In Croatia, all local and national commercial media have a legal obligation to produce news editions (Law on Electronic Media, 2013, Art. 36). According to the IREX Media Sustainability Index for 2016,<sup>54</sup> freedom of speech is assessed as near sustainable, which implies that the country has achieved progress in creating a business atmosphere that supports the independent media. The index explains that the commercial TV-channels have seen the commercial potential of news programming, recognizing the trend and investing substantial efforts in news production.

“The commercial televisions understood that investing in the production of the central evening news editions pays off; therefore, their news editions have a much larger viewership in comparison to the viewership of the public broadcasting,”<sup>55</sup> explains Živković.

The three national TV-channels – the public broadcasting service and the commercial TV-channels Nova TV and RTL – area actually competing among themselves for the

<sup>48</sup> The Republic of Croatia Ministry of Culture, Draft Proposal of the media policies of the Republic of Croatia by 2020 (Nacrt prijedloga medijske politike Republike Hrvatske do 2020 godine), RHMK, 2015. Available at: [http://www.hnd.hr/uploads/files/nacrt\\_prijedloga\\_medijske\\_politike\\_republike\\_hrvatske.pdf](http://www.hnd.hr/uploads/files/nacrt_prijedloga_medijske_politike_republike_hrvatske.pdf).

<sup>49</sup> Viktorija Car, „Searching for a Pluralistic Public Service Media“, LSE Media Policy Project, 1-2. Available at: <http://www.lse.ac.uk/media@lse/documents/MPP/Policy-Paper---Viktorija-Car.pdf>.

<sup>50</sup> Paško Bilić and Nada Švob-Đokić, “The pendulum model of Croatian media policy: Digitalisation between public interests and market competition” in European Journal of Communication 2016, Vol. 31(5) 503–518. Available at: <http://journals.sagepub.com/doi/pdf/10.1177/0267323116659976>.

<sup>51</sup> Interview with Tena Perišin, journalist and professor of television journalism at the University of Zagreb, 3 February 2017.

<sup>52</sup> Law on Electronic Media, 2009, Art. 38.

<sup>53</sup> Interview with Milan Živković, former media policy advisor in the Croatian Ministry of Culture, 9 February 2017.

<sup>54</sup> IREX, Media Sustainability Index 2016, Washington DC, 2016. Available at: <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2016-full.pdf.pdf>.

<sup>55</sup> Interview with Milan Živković, former media policy advisor in the Croatian Ministry of Culture, 9 February 2017.

audience through their central television news editions, broadcasted at the same time.<sup>56</sup>

*“In addition to the evening news edition, RTL went a step ahead with the news by making them resemble the evening show, i.e. RTL Direct hosted by renowned journalist Zoran Šprajc. The show focused on the feature story and the interview, and the host became a true anchor who comments on current events. Nova TV broadcasts the Central news edition (Dnevnik) lasting 45-50 minutes, in which the quality of some topics is higher to the ones presented in the public television,”* believes Tena Perišin, journalist and professor of television journalism at the University in Zagreb.<sup>57</sup>

Although experts, like Živković, consider that the informative and documentary genres are rarely broadcasted on the commercial TV channels, they also note some important exceptions, such as the example with Nova TV’s “Provjereno”, which is considered as popular and professional media content.<sup>58</sup>

With respect to the quality of the **informative programmes**, the assessment shows that the independent, alternative and critical discourse is hard to maintain. The Freedom House report on “Nations in Transit 2015”<sup>59</sup> reads that Croatia’s media landscape suffers from a lack of independent, quality outlets with high reporting standards. In that respect, it also reads that the private TV-channels focus on entertainment and that the quantity of their informative programmes is far lower in comparison to the public television service.

Despite the criticism, TV Nova marks a considerable viewership of their informative programme. The central news edition “Dnevnik” at 19:15 has marked high audience shares for three consecutive months (October to December 2016), placing itself on the top ten most viewed programmes in that period.

In 2016, the television received the international award for promotion, marketing and design *Promax BDA Global Excellence Award*,<sup>60</sup> i.e. the silver award for their News Programme Informational Graphics. In 2015, during the Croatian presidential elections, the TV channel introduced the pairing of the virtual system with the augmented reality broadcast, which showed to be extremely useful in presenting the data in the virtual world. They used the Stype system as the background graphics in the daily news, which to the viewers appear as though in real space.<sup>61</sup>

Their TV news applies modern graphic solutions for presenting results from the research conducted by Nova TV on the key social and economic topics.

In spite of the afore-stated, the programmes of the commercial TV-channels, especially the informative programme, face harsh criticism. *“They mostly have low quality entertainment content, while the informative programme is characterized by sensationalism. From a regulatory aspect and from the aspect of society in general, the expectations are low, having in mind that the content they present legitimizes their commercial orientation which is always accompanied by the cliché to give the viewers what they want,”* concludes Helena Popović.<sup>62</sup>

#### 4. SLOVENIA: RECORD DOMESTIC PRODUCTION OF THE MOST VIEWED TV-CHANNELS

The media experts from Slovenia, consider that the developing potential of the media is related to the economic situation in the country – if the economy grows, then production grows as well. The recovery of the media market after the 2008 economic crisis increased the quality of the media content of the TV-channels in Slovenia. The current trend that prevails in the programme offer of the commercial TV- channels in the past several years in Slovenia is producing and broadcasting own media content.

According to Tomaž Perovič, former director of news and sports in POPTV and Planet TV, the audience can be

<sup>56</sup> Ibid.

<sup>57</sup> Interview with Tena Perišin, journalist and professor of television journalism at the University of Zagreb, 3 February 2017.

<sup>58</sup> Interview with Milan Živković, former media policy advisor in the Croatian Ministry of Culture, 9 February 2017.

<sup>59</sup> Freedom House, Nations in Transit 2015, 2016. Available at: <https://freedomhouse.org/report/nations-transit/2015/croatia>.

<sup>60</sup> CME, Press release: „Nova TV wins Promax BDA Global Excellence Awards“, 20 June 2016. Available at: <http://www.cetv-net.com/company-news/press-releases/press-release-details/2016/Nova-TV-wins-PromaxBDA-Awards/default.aspx>.

<sup>61</sup> Marketing Magazin, „Ivana Galić, Nova TV: It takes considerable effort to capture viewers’ attention“, 7 June 2016. Available

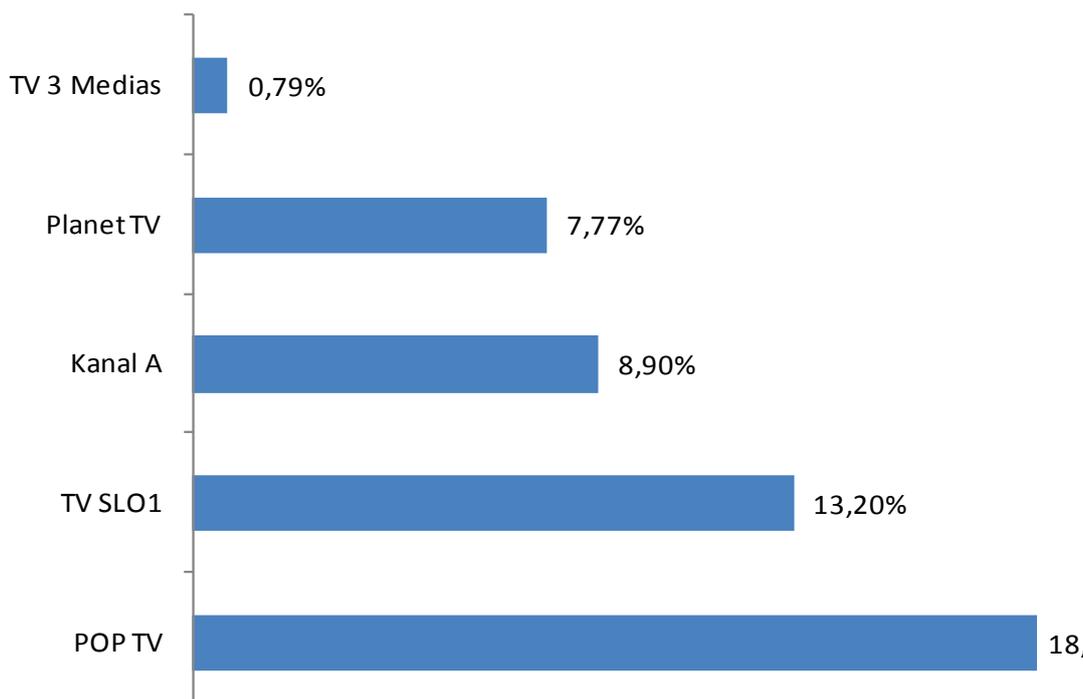
<sup>62</sup> Interview with Helena Popović, Professor at University of Zagreb, 8 February 2017.

attracted and retained only by a good programme produced in Slovenia, not by reality shows or translated series.<sup>63</sup>

„/.../In the past three years, /.../ both the private and public TV-channels have increased their own production quite significantly in comparison to the last 30-40 years. The commercial TV-channels started funding production of content and formats that were previously considered too expensive – TV series, feature films, etc. This resulted in the increase of the programme quality”, explains Perovič.

POP TV is the **most viewed commercial TV channel** in Slovenia, which, in the last quarter of 2016, had an audience share of 18.50%, compared to all other commercial TV-channels, the audience share of which is by far lower. As a comparison, the public service broadcasting company, Radiotelevizija Slovenija, had an average rating of 13.20% in the course of the entire 2016.

**Chart 3: Audience share of the commercial TV-channels on national level in Slovenia in the last quarter of 2016**



Source: AGB Nielsen Slovenia

**The most viewed programme** in Slovenia in the last quarter of 2016 was a show “Slovenija ima talent” (“Slovenija’s got talent”) which aired on POP TV with an audience share of about 60%. This show was followed by the central news edition “24 UR” (44.48%), then the entertainment show “Dan najlepših sanj” (41.46%) and the informative programme “Proverjeno” (35%). In 2015, the four best domestic production shows/programmes in Slovenia were also produced by POP TV.<sup>64</sup> Among the ten most viewed shows/programmes in the last quarter of 2016 is the evening news edition “Planet danes” on Planet TV.

<sup>63</sup> Interview with Tomaž Perovič, former director of news and sports in POP TV and Plant TV and media expert, 31 January 2017.

<sup>64</sup> Web site of CME. Available at: <http://www.cetv-net.com/operations/slovenia/pop-tv/default.aspx>.

**Table 5: 10 most viewed programmes on the national TV-channels in the last quarter of 2016**

Медиум	Programme/Show	AMR (%)
POP TV	1. Entertainment programme: "Slovenija ima talent" (16.10.2016)	27,35
	2. News programme: "24 UR" (06.11.2016)	19,21
	3. Entertainment programme: "Dan najlepših sanj" (21.11.2016)	16,20
	4. Informative programme: "Preverjeno"(20.12.2016)	13,84
	5. News programme: "24 UR vreme" (06.11.2016)	13,74
	6. Serial: "Usodno vino" (08.11.2016)	13,24
Kanal A	7. Sport: Nogomet prva liga telekom tekma: Šport - igre z žogo (15.10.2016)	12,88
Planet TV	8. Reality show: "Kmetija nov začetek"(17.12.2016)	12,34
	9. Serial: "Ena žlahtna štorija" (06.12.2016)	10,72
	10. News programme: "Večerni planet danes" (31.10.2016)	10,34

Source: AGB Nielsen Slovenia

With the launching of POP TV in mid 1990s, the public broadcasting service of TV Slovenia got a true competition. It started dominating the Slovenia media market the moment it was launched. In 2016, the television and its portal [www.24ur.com](http://www.24ur.com), received the TOP quality award in Slovenia, and for seven consecutive seasons the channel has been recognized as the most trusted brand among all TV broadcasters in the country.<sup>65</sup> The company promotes itself as the TV channel with a broadcasting programme for the general public, supported by the reality shows and entertainment programmes as their brand.

Back in 2000, the famous quiz show "Who Wants to be a Millionaire" began broadcasting on this TV-channel, which became one of the most popular shows in Slovenia. In 2004, the TV channel started broadcasting a local comedy series "Nasha mala klinika", which also aired before the Macedonian audience. In 2013, "Pro Plus" intensively started working on its domestic production, i.e. in 2015, as the company itself began to stand out, it started breaking the records in in-house production of shows/programmes reaching a high viewership, such as the franchise show "Znan obraz ima svoj glas" ("Your face sounds familiar"), "Dan najlepših sanj" ("The Perfect Wedding"), "Master Chef Slovenia" or "Gostilna išče šefa" ("Restaurant looking for a boss").<sup>66</sup>

<sup>65</sup> CME, "2016 Investor Presentation", CME. Pg. 5. Available at: [http://s2.q4cdn.com/384102709/files/doc\\_presentations/2017/Q4-2016-Investor-Presentation\\_final.pdf](http://s2.q4cdn.com/384102709/files/doc_presentations/2017/Q4-2016-Investor-Presentation_final.pdf).

<sup>66</sup> "Pro Plus" website: [http://pro-plus.si/slo/pro\\_plus/zgodovina/](http://pro-plus.si/slo/pro_plus/zgodovina/).

**Table 6: Top five programs on the four commercial TV-channels on national level in Slovenia in the last quarter of 2016**

	ПОП ТВ	Канал А	ТВ Планет	ТВ 3
The most viewed shows/programmes in Slovenia in the last quarter of 2016	„Slovenija ima talent“ (entertainment programme) (16.10.2016)	„Nogomet prva liga Telekom tekma“ (sport) (15.10.2016)	„Kmetija nov začetek“ (reality show) (17.12.2016)	„Vlogerji“ (entertainment programme) (24.12.2016)
	„24 UR“ (News programme) (6.11.2016)	Liga prvakov nogomet tekma (Sport) (1.11.2016)	„Ena žlahtna štori-ja“ (Slovenian TV Series) (6.12.2016)	„Vroč z Leo“ (entertainment programme) (5.11.2016)
	„Dan najlepših sanj“ (entertainment programme) (28.11.2016)	„Policijska akademija 2“ (film) (30.12.2016)	„Večerni planet danes“ и „Večerni planet danes vreme“ (News programme) (3.12.2016)	„Jaz in delfin“ (Film) (13.12.2016)
	„24UR Vreme“ (informative programme) (6.11.2016)	„Policijska akademija“ (Film) (30.12.2016)	„Večerni planet danes sport“ (News programme) (3.12.2016)	„Vreme napoved“ (informative programme) (15.11.2016)
	„Usodno vino“ (TV show) (8.11.2016)	„Moto GP dirka“ (Sport)(13.11.2016)	„Сам дома“ (film) (22.12.2016)	Tanja Žagar koncert ob 10 obletnici Hala Tivoli (music programme) (24.12.2016)

Source: AGB Nielsen Slovenia

**Kanal A** is the first private TV channel in Slovenia, which started working in 1991 and joined the “Pro Plus” media group in 2000. Its target audience are primarily men, however according to the format it offers news, sports, movies and entertainment shows. Kanal A is recognizable by the broadcasting of sports events such as Moto GP, the Champions League, as well as the “Big Brother Show”.<sup>67</sup>

When TS Media established **Planet TV** in 2012, its entrance on the Slovenian market was considered as possible competition that could endanger the dominance of “Pro Plus”. In 2013, the Greek media corporation “Antenna Group” bought 51% of the shares of the TV-channel. Planet TV was to be founded on three pillars: their own production, sports programmes, foreign feature films and series, and information programmes for which the TV channel hired well-known anchors, editors and hosts, some of whom transferred from the public broadcasting service.<sup>68</sup> However, in the past few years, the TV channel faced great financial and organizational problems. Thus, within

<sup>67</sup> CME website, Section: Operations: <http://www.cetv-net.com/operations/slovenia/kanal-a/default.aspx>.

<sup>68</sup> S.D., “Telekomova TV predstavlja ekipo in program”, website: <http://www.zurnal24.si>, 12 June 2012. Available at: <http://www.zurnal24.si/telekomova-tv-predstavlja-ekipo-in-program-clanek-159341>.

four years since its foundation, four management teams have been replaced.<sup>69</sup> In 2016, the company owner, TS Media, daughter-company of Telekom Slovenia, paid off the debt to the largest debtors, among which were the production houses that produced some of the most popular series and reality shows aired on this TV channel.<sup>70</sup> The same year, following the capital hike, Telekom Slovenia became the dominant shareholder in the Antenna TV SL, registered as the broadcaster of Planet TV.

In addition to the high ratings and audience share of the programmes on POP TV and Kanal A, they managed to attract quite a significant number of the TV industry professionals. *“That is a fair fight, no one is in a privileged position, they fought for it themselves, and they succeeded”, Perovič considers. According to him, Planet TV has had some great rises and falls in the past 2-3 years: “When they have their own production, then the TV channel is doing well and it manages to become second in audience share. When they do not have their production, the audience turns to POP TV or Kanal A”.*<sup>71</sup>

After the many turbulences since its establishment, today, TV channel TV 3 is oriented to the Slovenian entertainment and contact programmes/shows, “Klepet ob kavi” (“Chit-chat over coffee”), “High life”, “Kava z Gianniem” (“Coffee with Gianni”), “Moj dan” („My day“), “Vlogerji”, the latter being one of the most viewed entertainment and educational programmes for young people under the age of 25. The broadcasting programme scheme also includes Croatian, Serbian, German and Spanish series, as well as feature films.

The influence of **TV 3** is almost irrelevant among the Slovenian audience, both from the aspect of advertising and their own production, especially from the aspect of political affiliation. *“Their informative and news programme is almost non-existent, it revolves around conversations in the studio and commercial and entertainment content”,* comments Marko Milosavljević. A confirmation of this is the audience share for the last quarter of 2016, which was about 1%.

Slovenian TV-channels have a **rich domestic production**, both in quantity and quality, which is substantiated with the broadcasting programme/programme scheme and with the show/programme ratings. Slovenian production is mainly oriented to informative and entertainment programs. According to Milosavljević, to a certain extent, that is good, given the aspect of hiring Slovene producers, actors and directors. His criticism is related to the fact that *“there are not many documentaries, educational and cultural programmes. From the aspect of content diversity, it is quite poor”.*<sup>72</sup>

#### 4.1. News programmes: Innovative news with high ratings

In addition to the entertainment programmes, the list of top ten most viewed programmes in the last quarter of 2016 included POP TV’s and Planet TV’s news programmes. Even though in Slovenia, the legal framework is more liberal in the sense that there are no specific requirements for TV-channels to produce news programmes, they voluntarily produce them in order to be more influential and have better ratings, because viewers expect that from them.<sup>73</sup>

POP TV started broadcasting news since its launch in 1995, constantly redesigning them over the years so that today “24UR” is a recognizable brand. In the last quarter of 2016, this was the second most watched content among the Slovenian audience, after the entertainment programme “Slovenia’s got talent”, which speaks of the popularity of the news programmes themselves. The news programme “24UR” received the prestigious media award “Viktor” for most popular TV-programme in the country in 2009 and 2011.

One of the innovative endeavours of the editorial team of POP TV is the reporting of the 2012 presidential elections, when Perception Analytics platform was applied in the news programme. Through this platform, they followed the opinions of the Slovenian audience on the social networks to the three presidential candidates. The platform was used for the first time in Slovenia to present public opinion indicators live.<sup>74</sup>

<sup>69</sup> Svenšek, K., Hreščak, A. in Kramberger, U., Sh., “Planet TV: Telekom je odprl denarnico, televizija gre naprej”, Dnevnik, 11 September 2016. Available at: <https://www.dnevnik.si/1042750819/posel/novice/planet-tv-telekom-je-odprl-denarnico-televizija-gre-naprej>.

<sup>70</sup> Ibid.

<sup>71</sup> Interview with Tomaž Perovič, former director of news and sports in POP TV and Plant TV and media expert, 31 January 2017.

<sup>72</sup> Interview with Marko Milosavljević, professor in journalism at the Faculty of Social Sciences of the University in Ljubljana, 16 February 2017

<sup>73</sup> Ibid.

<sup>74</sup> “Pro Plus” company website: [http://pro-plus.si/eng/pro\\_plus/history/](http://pro-plus.si/eng/pro_plus/history/).

The weekly magazine “Preverjeno” (“Confirmed”), which has also been airing on POP TV since 1995, does not deal directly with political issues; it deals with social issues, and it is one of the most watched shows/programmes on this television, and also one of the ten most watched programmes/shows by the Slovenian audience in general.

The news programmes “Svet” na Kanalu A and “Planet Danes” broadcasted in the evenings on TV Planet were among the programmes with the largest share in the last quarter of 2016.

TV 3 TV channel, on the other side, does not produce ordinary news programme formats; instead, from March 2017, it started broadcasting the commentators programme “VV Factor”, hosted by a senior but controversial Slovenian TV presenter, who is presenting the news from Slovenia and abroad through his commentary and subjective approach.

**Political influences** on commercial televisions, which generally manifest themselves through the news, are not visible in POP TV and Kanal A, since the company, “Pro Plus”, which is in the hands of a foreign owner from the USA, is primarily profit oriented and it is interested in gaining better ratings and viewership, regardless of politics.

Planet TV’s news programme initially hired prominent journalist and anchors, since the TV channel was introduced as an ambitious project. When it was established in 2012, concerns were raised about legal ground for indirect ownership by the state-owned Telecom Slovenia and the alleged involvement of one of the political parties. It was connected to the potential risk of “indirect state ownership affecting the work of journalists,” to which representatives of the television station claimed that “even if there was any pressure, they would protect it with their professionalism”.<sup>75</sup>

The influence of the political and business centres of power is more visible in the public service broadcasting and the print media, where there were several cases in the past few years that influenced Slovenia’s rating on the list of Reporters Without Borders in 2017 (compared to 2013, for example),<sup>76</sup> despite the aspirations of the Ministry of Culture of Slovenia to include the country among the top 20 countries according to the development of the media sector by 2020.<sup>77</sup>

## 5. COMPARATIVE CONCLUSION ON THE PROGRAMME DIVERSITY OF THE MOST INFLUENTIAL TV CHANNELS IN MACEDONIA, CROATIA AND SLOVENIA

The data show that the most viewed TV channels in Macedonia, TV Sitel and TV Kanal 5, owe their popularity mostly to the Turkish series and the Serbian production entertainment programmes and shows. The difference in the ratings between the two TV-channels is almost double, to the extent that Sitel TV dominates the segment of commercial terrestrial TV-channels on national level. TV Telma, with all top five programmes with informative character (news editions and debate programmes) and TV Alfa, with the greatest diversity among the five most watched programs in the investigated period (news editions, Serbian feature films, quiz shows, Turkish series and domestic production series) stand out of the unified “recipe for success”. However, these two TV stations had the lowest ratings in the last quarter of 2016.

Unlike Macedonia, the Croatian Nova TV and RTL are dominated by the entertainment shows and programmes, reality shows and the news programme, which are among the ten most viewed in general and individually by television channels. Both television channels broadcast Turkish series, but they are not dominant neither in terms of quantity nor prime time schedule, as it is the case in Macedonia. The broadcasting programme scheme of Nova TV and RTL is rich with many international TV series and films, enabled by the financially powerful media conglomerates that stand behind them, which can provide a rich catalogue of world production.

<sup>75</sup> Polak, T., “Sproščena televizija celoglavih novinarjev in kredibilnih nanizank”, Dnevnik, 13 June 2012. Available at: <https://www.dnevnik.si/1042535768/magazin/aktualno/1042535768>.

<sup>76</sup> On 2017, Slovenia ranked 37, out of a total of 180 countries, on the list of Reporters Without Borders. The criticism in the media sphere referred to the threats to the reporters and journalists and the cases that have been brought to court against several reporters, as a result of the amendments in the Criminal Code, which represent threats to the freedom of information. Available at: <https://rsf.org/en/news/slovenian-justice-system-sanctions-journalists-climate-political-hostility-media>.

<sup>77</sup> Ministrstvo za kulturo, *Izhodisca za osnutekmedijskestrategije*, MK, Ljubljana, 2016. Available at: [http://www.mk.gov.si/fileadmin/mk.gov.si/pageuploads/Ministrstvo/Fotogalerija/2016/junij/MED-STRAT\\_Strategija5-2\\_26.5.2016-L.pdf](http://www.mk.gov.si/fileadmin/mk.gov.si/pageuploads/Ministrstvo/Fotogalerija/2016/junij/MED-STRAT_Strategija5-2_26.5.2016-L.pdf). Pg. 83.

On the other hand, the Turkish series are entirely absent from the list of the most watched shows in Slovenia, and the most popular are the entertainment programme, the news programmes and the domestic production. Domestic production dominates on the most viewed TV-channels. These programmes are listed among the highest on the top ten most viewed programmes on the TV-channels list in general and separately on each TV-channel.

In terms of domestic production, Macedonia is particularly lagging behind Croatia and Slovenia, where commercial TV-channels are competing for best ratings with domestic production programmes. In Macedonia, only one animated comedy series and one quiz show produced under license, aired on TV Sitel, were listed among the ten most viewed TV programmes. Speaking separately by television station, only “Zvezekmanija” on Kanal 5 and “Komšiski prikazni” on TV Alfa (which, at the same time, is supported from the budget for domestic production) were among the five most watched on the programme scheme of these TV channels.

The legal mechanism for co-financing the domestic feature film and documentary production in the past three years has not resulted in media products with exceptional quality. In addition, the representatives from the media industry see the negative sides of that subsidy mechanism, saying that because of imposed legal quotas and penalties it is more a burden than an incentive to work.<sup>78</sup>

Unlike Croatia and Slovenia, the ratings of the news programmes in Macedonia are lower compared to the other content. For example, the most viewed television TV Sitel, does not have a single news programme on the top five shows list, even though TV Sitel’s central news edition (Dnevnik) appears last on the top ten list of most watched programmes in the last quarter of 2016 (on the Elections day). On the other hand, all most watched shows on TV Telma are informative; however, in the researched period, the television station had lower ratings. The news editions and debate programmes were among the most viewed editions of TV Alsat-M, and they appear at least once on the top five most popular contents list in TV Kanal 5 and TV Alfa. In the last year, the attempts to introduce novelties in the presentation and packaging of the news editions, aimed at creating an attractive television media product have been visible among the most viewed TV-channels.

In Croatia and Slovenia, the fact that among the most popular TV programmes are the central news editions of Nova TV and POP TV, respectively, is particularly visible. The afore-stated TV-channels invest heavily in new technologies and have an attractive manner of presenting the daily news content. The Croatian RTL, which also has a large audience of the news programme, is working on innovative ways of communication with viewers and on integration of the concept of citizen journalism. At the same time, news programmes, such as the weekly magazine “Proverjeno”, also broadcasted on the Slovenian POP TV and the Croatian Nova TV are among the most popular, although they do not deal with political issues at all, but rather with social events and human stories.

The major commercial TV-channels in Croatia and Slovenia, supported by the major media companies – owned by foreign corporations - demonstrate greater independence from the political centres of power. For them, the audience share and ratings, which dictate their profits, are an “imperative”, which actually imposes the necessity to constantly offer popular and diverse content and genres; and the television station’s management team does not risk allowing political or business influences that can cost a drop in the ratings and viewership. In Macedonia, the political and business relations of the media owners with the centres of power are prominently reflected in the news editions and in profiling the overall image of the TV-channels.

Media experts in Croatia and Slovenia criticize the programme offers of the most popular TV-channels for the commercialization and tabloidization of the content, as well as for the abundance of sensationalism in the news. However, the general conclusion is that, unlike Macedonia, the news editions and other information programmes have large audiences, the TV-channels have a rich and diverse domestic production and a wide catalogue of foreign production entertainment programmes.

<sup>78</sup> Interview with Bisera Anastasijević, former Director of TV-Alsat M and expert on issues related to the media market, 8 February 2017.

## 6. CONCLUSION: HOW TO MAKE A DIVERSE, HIGH-QUALITY TELEVISION OFFER?

In Macedonia, the programme offer has been “frozen” in time for a long period, still justifying the description given by the media regulator in 2012: tedious and unattractive offer on the TV-channels.<sup>79</sup> On one hand, in the past ten years, the results have shown that popular soap operas and entertainment shows, which have been “set in stone” for years as the proven recipe for success, improve the ratings in Macedonia. On the other hand, the TV-channels that try to be different from the established and unified pattern - Turkish series, followed by news editions and reruns of Turkish series and all over again, do not attract a large audience.

Therefore, what could be the formula for successful commercial TV-channels in Macedonia, which would offer a high-quality programme and operate with profit in the interest of its viewers? Although it sounds impossible, one of the models might be the combination between the extremes: reasonable daily “dose” of quality series, quality entertainment programme and domestic production, and highly professional news releases and editions. Or, repeating what the representative of RTL, Ivan Lovreček said: „/.../ three main approaches - a powerful news programme, domestic TV series (telenovelas) and entertainment shows.“

If you want to have a highly professional commercial TV-channel, offering superior quality and state of the art programme, you need money. The economic potential of TV-channels is one of the key factors affecting the quality of the programme offer. The financial power of the media is directly dependent on the economic power of the market, which in Macedonia is highly concentrated, with too many audiovisual media. The “free market hand” has so far failed to rationalize the number of media, because the market was not left to operate freely, without influence and financial interventions by the political and business centres of power.

“Politics should maximally refrain from interfering so as to allow the market to regulate certain inherited phenomena, such as the enormously large number of media, which would lead to the economic relaxation of the ones that would survive. One such battle with fair and market conditions will foster creativity and diversity in content, on its own” said Bisera Anastasijević, former director of TV Alsat-M and an expert on issues related to the media market.<sup>80</sup>

Although the economic power of the media is crucial to create high-quality television, the following additional question imposes itself: how is it possible that, in Macedonia, the TV channel with the largest audience share and the highest profit in 2016, cannot afford more creative programme endeavours, compared to the television channel with the lowest rating, and ending the year with a loss, that still manages to purchase content from the latest world production?

The role of the regulator is to provide that the objectives stipulated in the Law on Audio and Audiovisual Media Services are achieved, and to ensure fair conditions and equal treatment to all media entities on the market. As highlighted in the 2012 Strategy, “opportunities for market entry of new entities should be open” had been applied in practice in the past five years in order to respect the principles of market liberalization. However, before awarding licenses, as stated in the Strategy, it should be established whether the applicant meets all necessary technical, economic and programming conditions, as proof that quality programme content will be offered and that its activity will contribute to increasing pluralism and quality of the programme offer. Only by consistent adherence to this commitment, which the Agency has set for itself, competition can be encouraged and contribution can be made to the development of the media market in Macedonia.

At the moment, before the adoption of the new strategy for the period 2017-2022, the conclusion is that the vision of the regulator with respect to the outlook of the media sphere in 2017 such as abundance of diverse programming content, professionally produced high quality programmes, meeting the diverse and changing tastes of the audience, programmes that are open to different political views and attitudes, informative content that is accurate and impartial, and editorial culture that is on a higher level and is

<sup>79</sup> BC, Draft-Strategy for the Development of the Broadcasting Activity in the Republic of Macedonia 2013-2017, BC, Skopje, 2012. Available at: <http://avmu.mk/images/stories/Predlog-Strategija-i-Akciski-plan.pdf>. Pg. 27.

<sup>80</sup> Interview with Bisera Anastasijević, former director of TV-Alsats M and expert on issues related to the media market, 8 February 2017.

based on respecting the professional journalistic standards and principles<sup>81</sup> has not yet been met.

## 7. RECOMMENDATIONS

1. The political and business centres of power must leave the media market in Macedonia to operate freely, without any influences or opaque financial interventions from budgetary sources in order to ensure fair competition for all media on the market. Working in fair and market conditions will in itself stimulate creativity and diversity in the media content.

2. The state should stimulate foreign investments in the media sphere by creating a favourable and competitive working environment, which will provide legal bases and their consistent implementation so as to secure the functioning of free market mechanisms, encourage transparency in the work of media entities, and provide all the mechanisms in order to ensure the independence of the regulatory body.

3. The Joint Industry Committee should be operational as soon as possible, in order for the media to gain trust in a credible system for measuring the audience share of the programme content of the media, on the basis of which they could build and develop their programme offer and strategic positioning on the market.

4. The commercial TV-channels should make efforts to create a diverse, creative and original programme offer, which will be different from the programme offers of the competing TV-channels in order to increase the quality and competitiveness of the media market. This requires a solid financial structure, highly professional staff and production and logistics facilities.

5. Following the example of Slovenia and Croatia, the commercial terrestrial TV-channels on national level should voluntarily, or through the Joint Industry Committee which should start functioning in Macedonia, publish data on the viewership and popularity of its programmes.

6. The legislator, the media regulator and other stakeholders should evaluate the effects of the support provided to the commercial terrestrial TV-channels on national level through the legal mechanism for co-financing of the domestic production.

7. State advertising and the current model to support domestic production should be abolished. Media community, relevant institutions and actors from the media industry need to open a debate about the models and mechanisms for possible support/subsidies of programs of public interest (such as mechanisms for support of pluralism in Slovenia and Croatia), in order to provide fair, transparent and meaningful allocation of resources and encouraging of quality domestic production and public-interest content.

8. The commercial terrestrial TV-channels on national level have to work on establishing mechanisms for communication with their audience, following the example of Croatia's RTL and Nova TV, so as to be able to engage the audience in shaping its programme offer, and to hear their reactions to the programme offer.

9. The media regulator should determine if the applicants for a license for television broadcasting can meet the necessary technical, economic and programming conditions, and offer quality programme content that will contribute to increasing pluralism and quality of the programme offer. The regulator should strictly monitor the fulfilment of all conditions offered during the operation of the media.

<sup>81</sup> BC, Draft-Strategy for the Development of the Broadcasting Activity in the Republic of Macedonia 2013-2017, BC, Skopje, 2012. Available at: <http://avmu.mk/images/stories/Predlog-Strategija-i-Akciski-plan.pdf>. Pg. 6.

## BIBLIOGRAPHY

AAAVMS, Studija za utvrđivanje na opravdanost za objavivanje javen konkurs za dodelivanje dozvola za televizijsko emitovanje na drzavno nivo, AAAVMS, Skopje, 2016. Available at: [http://avmu.mk/images/Studija\\_za\\_utvrđivanje\\_na\\_opravdanost\\_za\\_javen\\_konkurs\\_\\_04.11.2016.pdf](http://avmu.mk/images/Studija_za_utvrđivanje_na_opravdanost_za_javen_konkurs__04.11.2016.pdf). Accessed on: 16 November, 2016.

AAAVMS, "Istrazivanje na mediumskata pismenost kaj vozrasnata populacija vo RM", AAAVMS, Skopje, 2016. Available at: [http://www.avmu.mk/images/Istrazivanje\\_na\\_mediumskata\\_pismenost\\_kaj\\_\\_vozrasnata\\_populacija.pdf](http://www.avmu.mk/images/Istrazivanje_na_mediumskata_pismenost_kaj__vozrasnata_populacija.pdf). Accessed on: 18 November, 2016

AEM, *Navike gledanja televizijskih programa*, AEM, 2016. Available at: <http://www.e-mediji.hr/hr/pruzatelji-medijskih-usluga/istrazivanja-i-analize/istrazivanje-pokazalo-gledatelji-zele-vise-filmova-i-dokumentaraca/>. Accessed on: 27 November, 2016.

Agencija za elektronicke medije, *Analiza gledanosti televizijskog programa u Hrvatskoj*, AEM, 2016. Available at: <http://www.e-mediji.hr/hr/analiza-gledanosti-televizijskog-programa-u-hrvatskoj/>. Accessed on: 27 November, 2016.

BC, *Draft-Strategy for the Development of the Broadcasting Activity in the Republic of Macedonia 2013-2017*, BC, Skopje, 2012. Available at: <http://avmu.mk/images/stories/Predlog-Strategija-i-Akciski-plan.pdf>. Accessed on: 15 November, 2016.

CME, Press release: "Nova TV wins Promax BDA Global Excellence Awards", 20 June 2016. Available at: <http://www.cetv-net.com/company-news/press-releases/press-release-details/2016/Nova-TV-wins-PromaxBDA-Awards/default.aspx>. Accessed on: 25 November, 2016.

CME, "2016 Investor Presentation", CME. Available at: [http://s2.q4cdn.com/384102709/files/doc\\_presentations/2017/Q4-2016-Investor-Presentation\\_final.pdf](http://s2.q4cdn.com/384102709/files/doc_presentations/2017/Q4-2016-Investor-Presentation_final.pdf). Accessed on: 25 November, 2016.

Freedom House, *Nations in Transit 2015*, 2016. Available at: <https://freedomhouse.org/report/nations-transit/2015/croatia>. Accessed on: 27 November, 2016.

Institute for Communication Studies, "Reports from monitoring of the media content – MODEM", IKS, Skopje, 2016-2017. Available at: <http://respublica.edu.mk/modem-izvestai>. Accessed on: 26 November, 2016

IREX, *Media Sustainability Index 2016*, Washington DC, 2016. Available at: <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2016-full.pdf>. Accessed on: 23 November, 2016.

Law on Audio and Audiovisual Media Services, 2013, Macedonia.

Law on Electronic Media, 2009, Croatia.

Marketing Magazin, "Ivana Galic, Nova TV: It takes considerable effort to capture viewers' attention", 7 June 2016. Available at: <http://marketingmagazin.eu/2016/06/07/ivana-galic-nova-tv-takes-considerable-effort-capture-viewers-attention/>. Accessed on: 25 November, 2016.

Ministrstvo za kulturo, *Izhodisca za osnute k medijskestrategije*, MK, Ljubljana, 2016. Available at: [http://www.mk.gov.si/fileadmin/mk.gov.si/pageuploads/Ministrstvo/Fotogalerija/2016/junij/MED-STRAT\\_Strategija5-2\\_26.5.2016-L.pdf](http://www.mk.gov.si/fileadmin/mk.gov.si/pageuploads/Ministrstvo/Fotogalerija/2016/junij/MED-STRAT_Strategija5-2_26.5.2016-L.pdf). Accessed on: November 26, 2016.

Bilić, P., and Švob-Đokić, N., "The pendulum model of Croatian media policy: Digitalisation between public interests and market competition" in *European Journal of Communication* 2016, Vol. 31(5) 503–518. Available at: <http://journals.sagepub.com/doi/pdf/10.1177/0267323116659976>. Accessed on: 26 November, 2016.

Polak, T., "Sproščena televizija celoglavih novinarjev in kredibilnih nanizank", *Dnevnik*, 13 June 2012. Available at: <https://www.dnevnik.si/1042535768/magazin/aktualno/1042535768>. Accessed on: 26 November, 2016.

"Pro Plus" company website: [http://pro-plus.si/eng/pro\\_plus/history/](http://pro-plus.si/eng/pro_plus/history/). Accessed on: 29 November, 2016.

RTL, "Annual report 2016", RTL Group, 2016. Available at: [http://www.rtlgroup.com/files/pdf2/rtl-group-annual-report-2016\\_online.pdf](http://www.rtlgroup.com/files/pdf2/rtl-group-annual-report-2016_online.pdf). Accessed on: 25 November, 2016.

S.D., "Telekomova TV predstavila ekipo in program", web site: <http://www.zurnal24.si>, June 12, 2012. Available at: <http://www.zurnal24.si/telekomova-tv-predstavila-ekipo-in-program-clanek-159341>. Accessed on: 17 November, 2016.

Svenšek, K., Hreščak, A. in Kramberger, U., Sh., "Planet TV: Telekom je odprl denarnico, televizija gre naprej", Dnevnik, 11 September 2016. Available at: <https://www.dnevnik.si/1042750819/posel/novice/planet-tv-telekom-je-odprl-denarnico-televizija-gre-naprej>. Accessed on: 24 November, 2016.

Trpevska, S., "Ethnocentric coverage: Audiences comfy zone in Macedonia" in New Europe's: Our World in 2017, 9 January, 2017. Available at: <https://www.neweurope.eu/article/ethnocentric-coverage-audiences-comfy-zone-macedonia/>. Accessed on: 25 November, 2016

The Republic of Croatia Ministry of Culture, Draft Proposal of the media policies of the Republic of Croatia by 2020 (Nacrt prijedloga medijske politike Republike Hrvatske do 2020. godine), RHMK, 2015. Available at: [http://www.hnd.hr/uploads/files/nacrt\\_prijedloga\\_medijske\\_politike\\_republike\\_hrvatske.pdf](http://www.hnd.hr/uploads/files/nacrt_prijedloga_medijske_politike_republike_hrvatske.pdf). Accessed on: 27 November, 2016

Viktorija Car, "Searching for a Pluralistic Public Service Media", LSE Media Policy Project, 1-2. Available at: <http://www.lse.ac.uk/media@lse/documents/MPP/Policy-Paper---Viktorija-Car.pdf>. Accessed on: 25 November, 2016.

Zrinjka Peruško, Assessment of Media Development in Croatia, Paris, UNESCO, 2010.

Media articles and web sites:

Intercepted audio materials, "Bomba 4" related to the phone tapping of journalists and "Bomba24" related to the media. Available at: <http://prizma.birn.eu.com/мк/стории/комплетен-материјал-од-сите-33-бомби-на-опозицијата>. Accessed on: 28 November, 2016.

CME, "2016 Investor Presentation", CME, 2016. Available at: [http://s2.q4cdn.com/384102709/files/doc\\_presentations/2017/Q4-2016-Investor-Presentation\\_final.pdf](http://s2.q4cdn.com/384102709/files/doc_presentations/2017/Q4-2016-Investor-Presentation_final.pdf). Accessed on: 28 November, 2016.

CME website. Available at: <http://www.cetv-net.com/operations/slovenia/pop-tv/default.aspx>. Accessed on: 20 November, 2016.

Dimitrievski, Z., "Politicka propaganda vo pikanten programski sendvic", Media Fact Checking Service, 10 October 2014. Available at: <http://proverkanafakti.mk/politicka-propaganda-vo-pikanten-programski-sendvich/>. Accessed on: 21 November, 2016.

Pavlovska, J., "Pomina vremeto na Sheherezada i Ali Riza", Utrinski vesnik daily, 21 June 2012. Available at: <http://www.utrinski.mk/default.asp?ItemID=648E3422D13FF4499DE19A7F63A003CE&commentID=481943&pLikeVote=0>. Accessed on: 20 November, 2016.

Pavlovska, J., "TV Alfa startuva so nova novinarska generacija", Utrinski vesnik daily, 2 June 2008. Available at: <http://www.utrinski.mk/?ItemID=4B2DBB0CA095D04C9A9A4FDB9DCC1EF8>. Accessed on: 20 November, 2016

"Pro Plus" website. Available at: [http://pro-plus.si/slo/pro\\_plus/zgodovina/](http://pro-plus.si/slo/pro_plus/zgodovina/). Accessed on: 28 November, 2016.

## LIST OF INTERVIEWS:

Interview with Bisera Jordanovska, former Director of TV-Alsat M and expert on issues related to the media market, 8 February 2017, Skopje. (via email)

Interview with Darko Peruševski, former Programme Director of the now-a-days closed TV A1, 1 February 2017, Skopje.

Interview with Ivan Lovreček, Deputy President of the RTL Television Management, 13 February 2017. (via email)

Interview with Milan Živković, former media policy advisor in the Croatian Ministry of Culture, 9 February 2017. (via email)

Interview with Tena Perišin, journalist and professor of television journalism at the University of Zagreb, 3 February 2017. (via email)

Interview with Helena Popović, Professor at University of Zagreb, 8 February 2017. (via email)

Interview with Tomaž Perovič, former director of news and sports in POP TV and Plant TV and media expert, 31 January 2017. (via skype)

Interview with Marko Milosavljević, Professor in journalism at the Faculty of Social Sciences of the University in Ljubljana, 16 February 2017. (via skype)

## **NOTE ABOUT THE AUTHORS**

Marina Tuneva holds a PhD in Cultural Studies at the University “Euro-Balkan” in Skopje. She is a Docent at the Institute for Communication Studies and Executive Director of the Council of Media Ethics of Macedonia.

Slavčo Milenkovski holds an MA in Economic Sciences from the Economic Institute in Skopje. He works as a program, research and production Assistant at Macedonian Institute for Media in Skopje.

Vesna Nikodinoska holds an MA in Global Communications from the American University of Paris. She is a Programme Manager and a researcher at the Macedonian Institute for Media in Skopje.

**#ReForMediaMKD**

Citizens, CSOs and Institutions Reforming Media in Macedonia



The project is funded  
by the European Union

MACEDONIAN — MEDIA  
INSTITUTE FOR 



Mirovni inštitut  
Inštitut za sodobne družbene in politične študije  
**The Peace Institute**  
Institute for Contemporary Social and Political Studies