

National Developments and European Statistical Standards

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In recent times, many aspects of European society have been harmonised as countries strive towards a truly unified European market. This has also been the case with the European mass media market. Indeed, European broadcasting media corporations have been operating in common EU markets for many years. In contrast, newspapers and magazines are still predominately oriented towards national readership and markets. Distribution methods and the different national languages may be some of the reasons why the press remains oriented inwards within national state borders. Therefore, any attempt to develop a comparative study of press statistics across the European continent is a good idea. The recent project initiated by the Institute for Journalism and Communication Research in Hanover must be commended. Only in this way, by using the same instruments to collect data, can the different European press markets be studied comparatively.

However, certain aspects of the questionnaire developed in Hanover are only relevant to the press in Germany and in some other EU countries. Arguably, the questionnaire is developed with specific features of the German press market in mind, such as the typology of newspapers (local, regional, national forms of publishing companies and forms of press syndicating), newspapers with complete editorial staff and those using syndicated news stories from larger newspapers (i. e. GNUS – General News Umbrella Section). It is this author's opinion that some of the questions proposed, especially those concerning GNUS, are not applicable to all countries within the European Union, or to the less developed countries of Eastern and Central Europe. This opinion will be developed further in this article using the press market in Serbia as an example.

The first issue concerns newspaper circulation statistics (the definition of newspapers is acceptable). In all EU countries, there are plenty of sources available to researchers to help them find out newspaper circulation data. In addition to official statistical yearbooks, newspaper circulation is easy to detect due to the fact that subscription is the predominant method of newspaper distribution in

a number of EU countries. Only a small number of copies are sold in kiosks and on the street. As a result, both newspaper management and researchers can easily ascertain fixed data about so-called "distributed circulation". In contrast, the author of this article faced a lot of difficulty in trying to ascertain both the printed and distributed circulation for newspapers in Serbia.

The Ministry of Information no longer exists in Serbia since the social upheaval of October 2000. Consequently, there is no reliable newspaper and book register for the country. For the same reason, the official *Statistical Yearbook*, which is published with a two year delay, does not contain the circulation data required for the purposes of our research. This author was compelled to interview either directors or editors-in-chief of all newspapers in order to find out the numbers for both printed and distributed circulation. Doing so, two sorts of difficulties arose. All those interviewed showed a clear tendency to increase reported circulation figures for their own newspapers. Generally, they were only prepared to disclose the number of printed copies. This could be seen as an attempt by interviewees to present their own newspaper as being more successful on the market. Typically, when asked about circulation figures for competing newspapers (in order to cross-check data), those interviewed tended to indicate smaller circulation figures for their competitors. There was also a tendency by those interviewed to either hide figures or declare greater numbers for distributed circulation. The reason for this is quite simple; Serbian law stipulates that a publishing company must pay 20% tax on the number of unsold copies. Therefore, this figure is a confidential business secret and companies are not ready to disclose it even for research purposes.

The research process is further complicated by the fact that distributed circulation of daily newspapers in Serbia varies by seasons and by days. This is the direct consequence of the unpredictability of street trading as a method of distribution. The best example is the daily newspaper *Politika*, which attains almost double circulation on Sundays compared with other days (150,000 versus 80,000 copies), thanks to their popular colour supplement. Other newspapers, especially those offering larger weekend editions and not appearing on Sundays, typically have an above average circulation on Saturdays. Using an alternative strategy, the author attempted to collect circulation data using printing houses as a source of information. However, the author soon discovered that printing houses sometimes print several thousand copies more than what has been ordered. These extra newspapers are sold through informal distribution channels in order to bring in some additional income for the printer. Therefore, the idea of using printing house figures as a source of circulation data was quickly abandoned.

The difficulties explained above demonstrate that even the acquisition of simple data such as circulation is not an easy task to accomplish in a country of

transition with an unstable press market and unstructured standards. However, using the definitions and guidelines given in the questionnaire, the author surmises that there are 12 newspapers in Serbia. Total distributed circulation is estimated to be around 607,000 copies (cf. table 1). This total is a cumulated figure of the average distributed circulation in November 2002, based on an approximation made by the author after cross referencing several reports collected through his own research (interviews).¹

Table 1		Newspapers in Serbia 2002 (Last Quarter): Figures and Circulation
Newspapers with complete editorial staff		12
Printed copies		607,000
Newspaper publishing companies		11
	Companies publishing only one newspaper	9 (497,000)
	Companies publishing several newspapers	1 (110,000)
	Companies exclusively publishing newspapers	4 (39,000)
	Companies also publishing other print media	7 (568,000)
	Independent newspaper publishing companies	10 (487,000)
	Companies as part of another company (≥ 50%):	1 (120,000)
Type of distribution	Street sales	96%
	Subscription	4%
Distribution area	Newspapers with mainly national distribution	8 (573,000)
	Newspapers with mainly regional distribution	3 (25,000)

¹ Concerning the data for 1998/99 (given in the questionnaire) it must be considered, that the former Federal Republic of Yugoslavia included Serbia, Montenegro and Kosovo. Treating this state as a whole, 22 dailies were reported. Now there is a new confederation of Serbia and Montenegro, and Kosovo is a protectorate under UN rule. So, the number of dailies in 2002 is smaller because my data covers Serbia only. 2 dailies published in Kosovo, and 4 dailies published in Montenegro are excluded. Furthermore, 2 sports papers are excluded due to the definition given by project managers, and the other newspapers meanwhile had to close down. (The data given in *World Press Trends 2003* includes dailies in Serbia and Montenegro, sport papers and economic dailies.)

Note from December 2003: The Serbian press market is still a very unstable one. After the assassination of Prime Minister Djindjic in March 2003 the tabloid *Nacional* had to close down by an order of the government. It was accused to be spokesperson of criminal groups involved in his murder. Because this tabloid had a circulation of 100,000 copies, other publishers reacted quickly in order to take over its readership. So, since March 2003 three new tabloids were founded: *Balkan*, *Kurir* and *Inter-nacional*. Another new daily, *Marka*, calling itself a paper for the elite, has stopped publishing on December 9, 2003, reporting that the publishers are out of money. Also the number of Serbian dailies increased since 2002, the complete distributed (sold) circulation of all dailies did not rise more than 50,000.

Distribution area	Newspapers with mainly local distribution	1 (9,000)
Circulation categories	≤ 5,000	2 (8,000)
	5,001 – 10,000	3 (29,000)
	10,001 – 50,000	3 (80,000)
	50,001 – 100,000	2 (170,000)
	101,000 – 500,000	2 (320,000)
Frequency of appearance	5 times a week	5 (43,000)
	7 times a week	7 (564,000)
Daytime of appearance	In the morning	12 (607,000)
Format	Traditional newspaper format	7 (157,000)
	Tabloid format	5 (450,000)
Languages	Official language	11 (597,000)
	Non-official language, spoken by part of the native population	1 (10,000)
Newspaper density in major cities	Major cities without a local newspaper	2
	Major cities with one local newspaper	1
	Major cities with three or more local newspapers	2
	Total major cities	5
Locations of publishing companies	In cities with a population between 10,001 and 1,000,000	4 (34,000)
	In cities with a population above 1,000,000 (i.e. in the national capital)	7 (573,000)
In brackets: number of distributed copies.		

Some Remarks on Serbian Newspaper Statistics

Assorted Editions

The section of the questionnaire dealing with assorted editions appears to be designed to ascertain whether or not there is a form of syndicated news within a national press market. In Germany, many smaller newspapers use a General News Umbrella Section (GNUS) prepared by a bigger newspaper in order to cut the costs of covering international affairs and the most important domestic political events. However, assorted editions are generally separate newspapers with their own publisher on location. It is not easy to answer this question after analyzing newspapers in Serbia. Only one daily (*Blic*) would seem to fully fit into the definition given in the questionnaire. *Blic* has two assorted editions, *Blic Montenegro* and *Europa Blic*. The General News Umbrella Section comes from the central editorial room in Belgrade, and journalists on the spot create

the rest of the newspaper. However, the problem with these two assorted editions (with a circulation of 5,000 and 7,000 copies respectively) is that they are distributed outside Serbia. The first edition mentioned is for distribution in Montenegro, and the second one is for distribution in Republika Srpska (Bosnia and Herzegovina). Hence, both regions do not constitute the Serbian press market, although the same language (Serbian) is used in both editions. Therefore, in the opinion of the author, this example must be excluded as subject matter for our research.

It could be argued that some other daily newspapers have assorted editions in the sense intended by the questionnaire. There are four Belgrade dailies, who print two editions of their own newspapers. The first edition is ready for transportation until 8 pm and usually has two or more pages of content dedicated to local and regional news within the geographical area of distribution. Early closure of this so-called provincial edition is caused by the necessity to transport copies outside Belgrade, mainly by trucks. The second, the so-called Belgrade edition, closes around midnight and contains more breaking news, late sports results and news from the Belgrade area. It is distributed in the capital and surrounding areas. Thanks to the discussions this author had with those involved with the design of the questionnaire at the Hanover conference about Press Markets in February 2002, these four Belgrade dailies can be counted as having assorted editions. Clarification adopted at the conference was that if a printing plant stops and subsequently starts printing a new version of the same paper, it means it has an assorted edition. However, it must be emphasized that all four newspapers mentioned above fall into the category of newspapers with complete editorial staff. Different content of the assorted editions (content adjusted to local and regional coverage) is composed in Belgrade, supplemented by items from news agencies and correspondents. In this sense, there is no single newspaper in Serbia without a complete editorial staff. That said, assorted editions are generally not the product of an incomplete editorial staff.

Newspaper Publishing Companies

Every newspaper is a product of a newspaper publishing company, that provides economical and administrative resources, amongst other things. These publishing companies are registered as separate legal entities in the trade courts. However, not all publishing companies have a printing plant. In fact, there are approximately 2,800 printing plants in Serbia, but only 3 of them have a capacity large enough to print thousands of newspaper copies (Begović 2003). Only one publishing company, Politika Newspapers and Magazines, publishes two daily newspapers (*Politika* and *Ekspres*). The total number of publishing companies dedicated exclusively to newspaper production is only 4 (out of 11). The majority of them try to use their brand name and manpower to offer other

products (like magazines and books) to the market, hoping to improve poor sources of income.

Ownership Structure of Serbian Newspapers

Over the last decade, the ownership structure of Serbian newspapers has changed. The majority of existing newspapers have passed into private property, either as shareholding companies or single owner enterprises. Only 4 out of 12 are still under some kind of state ownership, and they are also on the way to being privatized. There have been several attempts by newcomers to enter the press market in recent years, but until now none have been successful. In Serbia, there is currently no publishing company which belongs to another Serbian company. However, a relatively new phenomenon is foreign investment in Serbian publishing companies. Despite an extremely weak press market in Serbia (607,000 distributed copies in a country of 7.5 million inhabitants), two German companies decided to enter the market. The *Blic* newspaper daily, which from the very beginning was a foreign endeavour, was bought by Gruner & Jahr. This could be interpreted as the single example of a publishing company in Serbia belonging to another one, since Gruner & Jahr controls over 50% of its capital. From the questionnaire it was not clear whether researchers had this (international) type of company relationship in mind. This author interpreted it as a single publishing company belonging to another one. Another example is the publisher, Politika Newspapers and Magazines, which the German WAZ Group has bought a 49% share of. The identity of who owns the "golden share" is not known publicly, and therefore this example is not interpreted as one company belonging to another one.

Newspaper Supply: Street Sales and Subscription

The lack of reliable circulation data has caused additional difficulties concerning further sections of the questionnaire. The criteria and questions regarding newspaper supply (in Section 3 of the questionnaire) are clear. However, as explained in the opening remarks of this article, figures for street sales and subscription are only an approximate estimation. Based on the results of interviews with a number of experts in the field, this author estimates that only 4% of Serbian newspapers are distributed by subscription. Only libraries, schools, governmental institutions etc. use this method. Private individuals generally buy their newspaper on the street. The author also had some problems regarding the "area of newspaper distribution" in the questionnaire. There are no newspapers (appearing at least twice a week by definition) at local level. As a rule, local "municipality" newspapers appear once a week in Serbia. All others, except one Hungarian language daily (in Vojvodina), have the ambition to be distributed nationally. Generally, if there are not significant numbers of copies sold in other parts of the coun-

try, then publishers tend not to distribute copies to areas too far from their printing facilities. In practice, many newspapers stop distribution at regional borders due to financial reasons. Examples of this practice are *Dnevnik* and *Maguar Szo* (published in Novi Sad), both distributed in Vojvodina, and the newspaper *Narodne Novine* (Niš), which is read in this city and surrounding areas.

Market Situation

The questions regarding the market situation of newspapers (Section 3.8 of the questionnaire) also proved problematic. Although a small daily newspaper can sell nearly all of its copies in a certain region, it still might not be the market leader in terms of circulation within this region. An example of this is *Dnevnik* in Vojvodina. Some dailies from Belgrade have a higher circulation in Vojvodina than the total circulation of the local *Dnevnik* newspaper, which is confined only to this region. The national market leader is the tabloid *Vecernje Novosti* with a circulation of 200,000 copies, although directors of other newspapers assume that this figure also includes the edition for migrant workers published in Germany.

Newspaper Format

The choice of newspaper format deserves a comment too. The majority of the 12 newspapers have a tabloid format due to financial constraints and not by editorial choice. Newsprint is generally very expensive for Serbian publishing companies, and they often choose the tabloid format in order to reduce expenditure on paper.

Near-newspaper Print Products

The author was unable to answer the questions in Section 5 of the questionnaire. Due to the lack of official press statistics in Serbia, it is extremely difficult to collect data about near-newspaper products, "distributed for payment by consumer". Nevertheless, one thing is certain; there are no Sunday papers published either by companies issuing newspapers six times weekly, or as an independent edition. Periodicals not offering continuous coverage certainly exist in connection to exhibitions (for example book fairs) and sporting events, but there is no central archive to keep track of all of them. There are also periodicals covering primarily stories within a limited subject range, such as economic and sport periodicals. Interestingly enough, there are two daily sports newspapers in Serbia, but they were not taken into account for the analysis of the Serbian press market, because they do not fit the definition of a newspaper in the sense of its universality (i.e. "not bound, in their coverage, by certain thematic areas"). For the time being, there are no near-newspaper products on the

Serbian newspaper market, distributed for free and financed by local advertisers. With industry pushed back three decades in terms of GNP by sanctions and bombing, the current economic situation of the country is the simple explanation for the lack of free newspapers.

Conclusion

This author believes that the endeavours made by the Institute for Journalism and Communication Research in Hanover to unify European press statistics, deserve full attention and support. Indeed, this author has done his utmost to support these endeavours by studying the indigenous Serbian press market for the purposes of this research. However, as with other aspects of the European continent as a whole, it is obvious that the adjective "European" covers at least two different "Europes". The first Europe is a united group of western European countries, where an increasing number of subjects – including press markets – can be comparatively studied and analysed using the same criteria. The other Europe encompasses those countries in transition beyond the borders of the EU, where many standards and norms developed as "European" still do not apply. Other research reports into press markets of non-EU countries will undoubtedly confirm the conclusions made in this article. Nevertheless, it is hoped that further research into these aspects will initiate a better understanding and a curiosity about their uniqueness.

References

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Serbien**Nationale Entwicklungen und europäische statistische Standards (Zusammenfassung)***Mirosljub Radojkovic*

In einer kritischen Diskussion europäischer pressestatistischer Standards vermutet der Autor, dass – wie in anderen gesellschaftlichen Bereichen – von zwei verschiedenen „Europa“ ausgegangen werden muss. Während die meisten Definitionen und Kriterien implizit von westeuropäischen Gegebenheiten ausgehen und diese als „europäisch“ deklarieren, existiert jenseits der Grenzen der Europäischen Union ein anderes Europa, in dem viele „europäische“ Standards und Normen (zumindest noch) nicht gelten. Bei ihrer Entwicklung sollte aber die Situation in diesen Transformationsländern Berücksichtigung finden.

Unter schwierigen Recherchebedingungen konnte der Autor für das Jahr 2002 12 serbische Tageszeitungen und 11 Tageszeitungsverlage nachweisen. Mit Ausnahme einer für die ungarische Minderheit bestimmten Zeitung wird die Tagespresse in der Landessprache herausgegeben. Die verbreitete Gesamtauflage ist auf dem Tageszeitungssektor mit etwa 607.000 Exemplaren zu beziffern. Der Absatz konzentriert sich aufgrund von Vertriebsproblemen fast zur Gänze auf den Straßenverkauf; die Vertriebsform des Abonnements wird bisher fast ausschließlich von Bibliotheken, Schulen und staatlichen Institutionen in Anspruch genommen.

Im Hinblick auf die Eigentumsverhältnisse der Verlage kam es in den letzten zehn Jahren zu tief greifenden strukturellen Veränderungen. Die Mehrheit der Zeitungen ist in Privatbesitz übergegangen. Zahlreiche Versuche von Neueinsteigern, sich am Markt zu positionieren, schlugen fehl. Als relativ neues Phänomen sind ausländische Beteiligungen bei serbischen Verlagen zu registrieren. Die deutschen Großverlage Gruner & Jahr sowie die WAZ Gruppe sahen das enorme Entwicklungspotential auf dem noch relativ schwach ausgebildeten Markt und haben sich als Hälfteeigentümer eingekauft.

Da das Informationsministerium seit Oktober 2000 nicht mehr existiert, gibt es zurzeit keine für die offizielle Pressestatistik zuständige Registrierungsstelle und Kontrollinstanz. Aus diesem Grund basiert die Ermittlung der Auflagenzahlen für den vorliegenden Beitrag auf Interviews mit den Zeitungsherausgebern. Da die Verlage im Allgemeinen dazu tendieren ab- oder aufzurunden, sind die Ergebnisse der Auflagedaten mit den entsprechenden Vorbehalten zu interpretieren.

