

MEDIA

SUSTAINABILITY

INDEX

2004



IREX

“IN TERMS OF LEGAL MATTERS, ALL CONDITIONS FOR EQUALITY EXIST. HOWEVER, THE PRACTICE REVEALS A DIAMETRICALLY OPPOSITE SITUATION,” NOTED FUAD KOVAČEVIĆ.

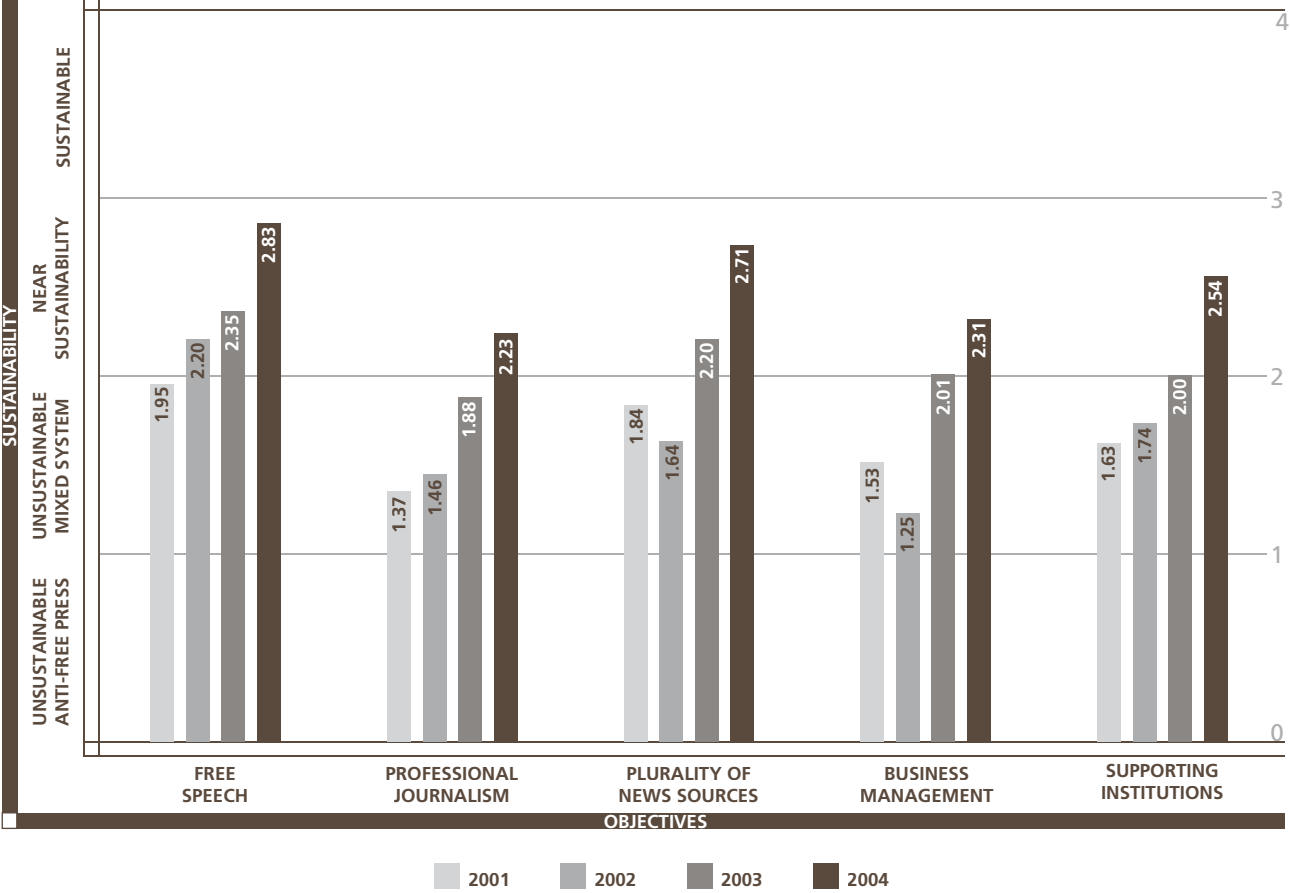


The Dayton Peace Agreement, which provides a framework for the constitutional and territorial arrangements for Bosnia and Herzegovina (BiH), also provides basic parameters for a media system in the country of 3.8 million people. Apart from effectively stopping the war in BiH, the 1995 agreement also laid out a complex political system: BiH now consists of two entities—BiH Federation (FBiH), dominated by the Croat and Bosniak population, and Republika Srpska, which is dominated by Serbs. Besides these two entities, there is also the Brčko District. Moreover, the FBiH is divided into 10 cantons—four dominated by Croats, four by Bosniaks, and two mixed. Implementation of the agreement’s civil aspects is the responsibility of the Office of the High Representative (OHR), whose powers are affirmed by the United Nations Security Council and who also acts as the special representative of the European Union (EU) in the country. The High Representative has supreme legislative and administrative powers in the country, including the mandate to impose laws and decisions and to discharge officials at any administrative level if their activities contravene the letter and spirit of the peace accord. In practice, almost all major constitutional changes, legislative solutions, and institutional reforms come from the OHR. The resistance of governing ethnic elites to many of these moves also remains evident.

The Bosnian political scene is still significantly shaped by three ethno-nationalist parties: the Party of Democratic Action (SDA – Bosniak) and the Croat Democratic Union (HDZ – Croat) in the Federation BiH entity; and the Serb Democratic Party (SDS – Serb) in Republika Srpska. Under pressure from the international community, these parties are more or less implementing the reforms that should lead BiH into the EU, but the process is very slow. The High Representative exercises his authority when no consensus can be reached among the political parties—which is more often than not. In addition to the ethnically based parties, social democratic parties are becoming increasingly significant, especially the Social-Democratic Party (SDP), with its constituency mainly coming from FBiH, and the Party of Independent Social-Democrats (SNSD) from Republika Srpska.

MEDIA SUSTAINABILITY INDEX

BOSNIA AND HERZEGOVINA



Unsustainable, Anti-Free Press (0-1): Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2): Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3): Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4): Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

The development of the media sector is evident as part of the slow but steady movement forward of almost all segments of Bosnian society. However, it has been hindered by the ongoing influence of political parties, businesses, government, and religious groups, as well as by rather bleak economic prospects for the media market. Although the results of prior Media Sustainability Index (MSI) research shows year-to-year progress, the 2004 evaluation shows panelists agreed that the media sector still has not achieved overall sustainability.

Little to no foreign investment, reduced consumer purchasing power, the general withdrawal of foreign donors whose attention has shifted to other crises, and an oversaturated marketplace created in part by political party involvement and donor activity have all made the situation difficult for BiH media. In addition, poor business practices by media willing to undercut advertising pricing and the outflow of marketing income into neighboring Croatia and Serbia contribute to the industry's problems.

Media outlets remain vulnerable to political pressures. While some outlets consider themselves independent, others see themselves in a so-called nation-building role, typically taking on the representation of one of the BiH nations as their mission. This is especially true among the print media. A long-standing, politicized conflict between two groups of printed media (daily newspaper *Dnevni Avaz* and magazines *Ljiljan* and *Walter* on one side, and daily *Oslobođenje* and magazines *Slobodna Bosna* and *Dani* on the other), waged in the publications themselves and in court defamation suits, continues to undermine professional norms.

However, the situation in electronic media is better due to a rather strong and efficient regulatory framework outlined through the Law on Communications and the Communications Regulatory Agency (CRA). The Press Council is attempting self-regulation of compliance with professional standards in print media, but its role has not yet taken hold. The Council defined an ethical code built on European standards, but most journalists and editors are not ready to implement it fully. Low professional standards and fragmentation of journalists into four professional associations have contributed to the problem, although some readiness to consolidate the associations and implement the code appeared in 2004.

Finally, even the public broadcasting system, consisting of FBiH RTV (RTVFBiH), Republika Srpska RTV (RTRS), and the Public RTV Service of BiH (PSBBiH), has not avoided problems. Support from the international community has put the broadcaster in a financially privileged position compared with private outlets,

with the public broadcaster entitled to income from subscription fees plus a specified amount of advertising. Commercial broadcasting has no limits on advertising.

OBJECTIVE 1: FREE SPEECH

Bosnia Objective Score: 2.83 / 4.00

The legal framework for the protection of the freedom of speech in BiH is determined by the Constitution, the European Convention of Human Rights, and the Law on Protection Against Defamation. This law transfers the defamation statutes from criminal law to civil law. In addition, there is the Freedom of Access to Information Act. While considerable progress has been made in improving normative freedom of speech protections, serious problems still occur in practice. The most important barrier remains the judiciary's treatment of defamation lawsuits. MSI panelists pointed to the insufficient education of legal professionals as a major problem, both in terms of the laws being relatively new to the BiH legal system and the professional standards of journalism practice being unfamiliar to

Legal and social norms protect and promote free speech and access to public information.

FREE-SPEECH INDICATORS:

- > Legal/social protections of free speech exist and are enforced.
- > Licensing of broadcast media is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
- > Libel is a civil law issue; public officials are held to higher standards, and the offended party must prove falsity and malice.
- > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

judges. Failure to make use of the standardized practice of involving court-appointed media experts such as ombudsmen or media association representatives in these lawsuits aggravates the situation. However, panel participants said they expect improvement with time and practice.

On the other hand, panelists pointed to the freedom of speech abuses by journalists. For example, they noted the widespread practice referred to as “media lynching,” the presentation of a series of poorly researched or unsubstantiated stories about individuals or institutions. “We have often seen the texts, either written or broadcast in radio or TV, which are essentially completed in an unprofessional manner, which lack the research, multiple views, and so forth,” said Amir Zukić, news program editor at the public broadcaster. “Do they simply get such assignments from their editors, or do they themselves feel the need to perform a media lynching of someone, denigrate his character, and destroy him, without any care for the consequences of such an act?”

“We have often seen the texts, either written or broadcast in radio or TV, which are essentially completed in an unprofessional manner, which lack the research, the multiple view, and so forth, and so forth. Do they simply get such assignments from their editors, or do they themselves feel the need to perform a media lynching of someone, demote his character, and destroy him, without any care for consequences of such an act?” stated Amir Zukić.

The victims of such media attacks, particularly after the adoption of the Law on Protection Against Defamation, often seek satisfaction through lawsuits against the media. In one case, Zlatko Lagumdžija, the president of one of the largest opposition parties, filed four lawsuits against daily newspaper *Dnevni Avaz*. It also illustrates that, according to the federal ombudsman for media, Mehmed Halilović, 15 percent of defamation

lawsuits against media or journalists are those filed by other media or journalists. This can be regarded as a consequence of media wars that often also develop into personal battles between the journalists of opposing media. Some panel participants also suggest that the

court, perhaps subject to media pressure and blackmail, may make biased decisions in the interest of certain media outlets, their owners, or other power centers.

The Freedom of Access to Information Act, which is quite progressive for Bosnia, has failed to take root fully in practice. Panelists mentioned that some state institutions (the FBiH government, for example) remain closed to media—a violation of the law. Another problem is the selective approach to media by public institutions, whereby media with better “political connections” can obtain information more easily. “The federal government, for at least one year, has failed to organize a press conference,” said Zukić. “They are totally closed, and we have no idea what goes on in their sessions. We know only after we research what happened. You have to gather information through private messages to ministers. If journalists are eager and resilient, they can barely learn about the session’s agenda, let alone obtain any intriguing facts.”

There are not many criminal acts against journalists, according to available information. However, in those cases that develop, the police and judicial systems generally fail to act. The MSI panel pointed to the years-old cases of assaults against journalists that still have not been resolved: No one has been arrested in the attack on the editor of *Nezavisne Novine*, Željko Kopanja, in 1999, and the perpetrator has not been sentenced in the 1998 incursion into the newsroom of *Dani* magazine. One panelist said that in his experience, journalists do not report attacks or intimidation because they do not trust the police or court institutions will offer help or protection. Nevertheless, the panel said progress had been made in that no violent attacks against journalists occurred in 2004.

No distinction is made between media and other branches of industry. The law does differentiate between private and public media, thus predefining their access to certain sources of income, such as state budget, subscription fee, and advertising income. Additionally, the existence of the state press agencies FENA (Federal Press Agency) and SRNA (Serb Press Agency), to a large extent supported by public funding, creates unfair competition vis-à-vis private agencies. The owner of the private news agency known by the initials ONASA, Fuad Kovačević, said, “In terms of legal matters, all conditions for equality exist. However, the practice reveals a diametrically opposite situation.” He said the government pays FENA about €850,000 a year and Republika Srpska pays SRNA about €825,000, meaning they can sell their services cheaply. “This is no longer only the problem of information; this is the problem of economy and politics, unfortunately,” he said.

The licensing of broadcasters is essentially fair, competitive, and apolitical, according to the panel. The CRA is in charge of the licenses and controls the broadcasting spectrum. The licenses are issued through public tenders and are highly competitive, and the procedures for awarding licenses are clearly outlined and rigorously implemented by the CRA.

Access to international news programs and information sources, as well as to the journalistic profession, are completely unrestricted.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Bosnia Objective Score: 2.23 / 4.00

Although they agree that the quality of journalism in BiH is constantly improving, panelists were still not satisfied with current levels. Journalists and media were seen to be focused on the exclusivity of stories, too often forgetting professional rules that should be applied to test them. Another development noted with concern in 2004 was the increasing identification of certain outlets with particular centers of political or business power, with the media turning into service-providers for these factions. In such cases, media become venues for squaring accounts among opposing forces.

Journalism meets professional standards of quality.

PROFESSIONAL JOURNALISM INDICATORS:

- > Reporting is fair, objective, and well sourced.
- > Journalists follow recognized and accepted ethical standards.
- > Journalists and editors do not practice self-censorship.
- > Journalists cover key events and issues.
- > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
- > Entertainment programming does not eclipse news and information programming.
- > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

Regarding the respect for accepted ethical standards, the difference between electronic and print media was evident. Electronic media adhere more closely because broadcasting regulation is managed by the CRA, which is authorized to impose fines, revoke licenses, and/or close media outlets in response to lapses. On the other hand, the self-regulatory body for print media, the BiH Press Council, only has the authority to recommend corrective

remedies such as the right to a response or a correction. Although the Press Council respects the high standards of European press codes and produced the *Bosnian Press Code*, implementation is not wide, either due to journalists' ignorance or

the lack of respect for these ethical norms. Panelists noted that there are print media that truly do respect professional norms as well as those that do not.

Related to concern about Bosnian media connections to political and economic interests, panelists noted that self-censorship still exists. Journalists and editors at some outlets will not try to breach the defined editorial policy for fear of losing their jobs. A December 2004 article in the daily *Oslobođenje* says: "Many journalists are involved in shady dealings against their will and their professional credos, because their existence depends on obedience. Due to the behavior of some media, the entire journalistic profession has become ill famed. Journalists stand on the crossroads between professional honesty and subservience to media manipulators." Another source of self-censorship, according to the panelists, is general pressure on media from the marketing industry. Some outlets and journalists can be forced to adjust their editorial policies to fit the needs of advertisers, or risk losing valuable revenues. "I think that politics is pushed into the rear, especially in private media, when compared to this self-censorship generated by business interests," said Senad Pećanin, editor of *Dani* magazine. "It is very hard, and I think that very few media exist that do not impose censorship or self-censorship motivated by business interests."

"I think that politics is pushed into the rear, especially in private media, when compared to this self-censorship generated by business interests. It is very hard, and I think that very few media exist that do not impose censorship or self-censorship motivated by business interests," explained Senad Pećanin.

Self-censorship also emerges from fear for personal safety. Pećanin said that decisions about whether to report on issues affecting the interests of certain groups may depend greatly on the personal courage of the journalist involved. Editors can censor their journalists because of potential conflicts with interest groups. "I am simply trying to answer the question if there are events that will, if covered, likely bring undesired consequences for editors and reporters; my experiences in practice absolutely tell me that they exist," said Pećanin.

Panelists agreed that journalists' salaries are a function of the poor overall economy, and low wages mainly result in flight to other professions.

"I am simply trying to answer the question if there are events that will, if covered, likely bring undesired consequences for editors and reporters; my experiences in practice absolutely tell me that they exist," said Senad Pećanin.

The balance between information and entertainment content was deemed to be rather even overall. However, there was concern that in the future, for economic reasons, entertainment content would prevail over the

information. The entire newsroom was dismissed from the BiH television station OBN in December 2004, with management saying that it was not sufficiently profitable.

The amount and quality of niche reporting also suffers because of the poor economy, although panel members said there had been some progress. The lack of funds also leads to studio programs such as talk shows rather than more creative and demanding productions. Panelists felt that the technical resources for gathering, producing, and distributing news were generally good. Although capacities differ by outlet, foreign donors have supplied equipment to the extent that technical facilities rate strongly in Bosnia.

OBJECTIVE 3: PLURALITY OF NEWS SOURCES

Bosnia Objective Score: 2.71 / 4.00

There are 188 electronic media outlets working in Bosnia and Herzegovina today, along with seven daily newspapers and at least six relevant weekly or biweekly magazines. However, such a large number of outlets does not necessarily mean plurality of information sources, at least not equally in all parts of the country. The largest number of electronic media are local stations, while public broadcasters reach some 70 to 80 percent of the population. The circulation of all daily newspapers is estimated at about 80,000 sold copies per day for the population of around 3.8 million people. The situation is similar with weekly and biweekly magazines. Poor circulation figures are primarily due to the limited purchasing power of the people. Many cannot afford newspapers that range in cost from €0.50 for daily newspapers to €1.5 for weeklies and biweeklies. Also, domestic circulation is reduced by the high level of competition from Serbian and Croatian media: There are 13 daily newspapers from those countries, as well as 61 foreign weekly or monthly newspapers.

Multiple news sources provide citizens with reliable and objective news.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens' access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

In addition to the limited range of electronic media and low circulation rates of printed media, there is yet another major, politically conditioned problem in Bosnia and Herzegovina: ethnic division and segregation of the audience. Media remain limited to certain ethnically defined areas. So, for example, *Dnevni Avaz* and *Oslobođenje*, two Sarajevo newspaper editions, primarily cover the area of BiH Federation, while *Glas Srpske*, a Banja Luka daily, remains solely oriented to the area of Republika Srpska. This division results from the aftermath of the war, but it also reflects the ethnically fragmented structure of the country's territorial and institutional arrangements. The exception is Banja Luka's *Nezavisne Novine*, which targets readership from the entire area of BiH.

Citizens' access to foreign and domestic media is not restricted in any sense. International media play an important role in the print and advertising sectors. The past year has also been marked by the rapid proliferation of cable television channels and providers, and there is also a slow but steady increase in Internet access.

The public broadcasting system consists of a state-wide broadcaster with one television channel, BHTV 1, which started on its own frequency in August 2004, and one radio channel, BH Radio 1. There also are Radio-Television of Republika Srpska and Radio-Television of the Federation of BiH, RTVFBiH. The harsh financial conditions pressure public broadcasters to increase commercial programming at the cost of more serious public-service programming. Also, due to the still undefined position of these broadcasters (the new Law on the Public Service Broadcasting System remains under discussion), they are vulnerable to a variety of political pressures.

The state-subsidized news agencies, used by outlets because they cannot afford to provide their own coverage, tend to favor news reporting from the entity from which they originate. However, panelists assessed the reporting of state agencies as greatly improved in recent years, while those from the "propaganda HQs" of ruling structures are undergoing transformation into professional information services.

Although commercial media produce their own information programs, their content does not differ greatly from those of public media. The main characteristic of the news programs of all broadcast media is the fact that they cover a great deal of national and international news and events, depriving audiences of local-interest news and information.

Ownership information on any outlet can be obtained through the court register. In April 2004, the CRA

introduced the Rule of Media Ownership and Cross Ownership, requiring licensed outlets to report any ownership structure change that exceeds 10 percent to the CRA. Also,

all legal entities are obligated by the relevant laws on commercial enterprises to register at the court and supply information on ownership structure and on any subsequent changes.

Nevertheless, there are problems in enforcing these regulations because state institutions have no capacity to control compliance.

Therefore, although there are no visible media monopolies in BiH, the possibility cannot be ruled out entirely.

There is no real resistance to introducing coverage of social and minority-group issues in the general media. Certain minority groups have their own bulletins or television or radio programs, but panelists agreed that economics preclude this practice from being more widespread, and the public broadcaster has not fully developed to include this kind of coverage.

The state-subsidized news agencies, used by outlets because they cannot afford to provide their own coverage, tend to favor news reporting from the entity from which they originate. However, panelists assessed the reporting of state agencies as greatly improved in recent years, while those from the "propaganda HQs" of ruling structures are undergoing transformation into professional information services.

OBJECTIVE 4: BUSINESS MANAGEMENT

Bosnia Objective Score: 2.31 / 4.00

In 2004, several major projects highlighted the development of the BiH media business. *Dani* launched a promotion by which readers of each new issue of this newspaper also could buy a book for an affordable €2.5. The published literary works were selected

BiH media tend to simply ignore poor ratings, attributing such results to poorly conducted research. However, Dino Dipa, director of research agency Prism Research, said there were indications during 2004 that the media market was maturing gradually and, as part of that process, becoming more attuned to the benefits of putting research information to work.

carefully, mainly classics of BiH and world literature, and the project met with very favorable reader response. Also, Avaz publishing company successfully completed the construction of its huge new business center. Additionally, two printing plants opened—one the expansion of the activities of daily magazine *San* and the other the modernization of *Nezavisne*

Novine's facility. Moreover, the modernization of printing facilities owned by Avaz got under way, and there was expansion of this media corporation into the broadcasting sector as well. The panelists concluded that these developments reflected an improvement in the media business environment during 2004 but that significant difficulties remain for media outlets seeking to achieve financial sustainability.

Most outlets are financed from a variety of different sources: advertising, donor organization funds, subscription fees, and sales. Each of these funding sources has its drawbacks. The “marketing cake” in Bosnia, compared with the number of media outlets, remains very small. Panelists put the value of the entire advertising market in BiH at about 30 million KM net for 2002, while in the neighboring Croatia that same sum is earned by public broadcaster HRT alone. However, the 2004 data provided by Mareco Index Bosnia, a media and market-research company, put the gross value of the television advertisement market at around €95 million. Assuming that the discounts that

Independent media are well-managed businesses, allowing editorial independence.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

media gave to clients cut this sum by about 50 percent, about €47.5 million in real gross television ad market value remains—less another 50 percent to reach the net amount of about €24 million. The gross value of the daily newspaper ad market was an estimated €2.3 million, or about €575,000 net.

Although marketing agencies cooperate with media, and there are indications that this cooperation is improving over time, such collaboration is also limited by poor finances. Additionally, smaller towns lose potential marketing money by the outflow of money to cities like Sarajevo. Panel participants could not say how income coming from advertising compares with that from other sources. The influence of media from neighboring countries that are in the position to sell their marketing services for BiH in a package with those for their own country also is a disadvantage for BiH. The situation is exacerbated by a large number of media operating in a disorderly market, driving down advertising rates.

The subsidizing of independent media by state authorities remains rather nontransparent. Some panelists mentioned that in municipalities and cantons, private media may receive funds from state institutions in return for reporting on the work of public institutions, a commercial service that also can be viewed as a form of subsidy. Additionally, 15 out of 39

television stations and 63 of 143 radio stations still are owned by local and regional governments.

The main customers for media research are marketing agencies, not the media themselves. That research that is purchased by outlets is used for ratings promotion, not for improving program content or business planning. BiH media tend to simply ignore poor ratings, attributing such results to poorly conducted research. However, Dino Đipa, director of research agency Prism Research, said there were indications during 2004 that the media market was maturing gradually and, as part of that process, becoming more attuned to the benefits of putting research information to work.

Independent agencies Mareco Index Bosnia and Prism Research provide data on radio and television ratings and print media readership. There is no Circulation Audit Bureau, however, and the circulation data may be based on assessments and unreliable information provided by publishers. The creation of a Joint Industry Committee for the broadcasting industry was under way in late 2004, and it was hoped this new independent agency would set generally accepted standards for measuring the television and radio markets.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Bosnia Objective Score: 2.54 / 4.00

Journalists' associations are fragmented along the country's political and ethnic seams and, consequently, inefficient as well as very dependent on foreign donors. Journalists lack a trade-union or collective contracts, and their labor rights are breached frequently with unpaid salaries, honoraria, and social fund contributions. The potential for improving the situation came in December 2004 with the establishment of the association BH Journalists, formed by the merging of three associations—the Independent Union of Professional Journalists from Sarajevo, the Association of Journalists "Apel" in Mostar, and the Independent Association of RS Journalists in Banja Luka. This association will direct most of its activities toward protecting journalists' labor rights. However, the Association of Croatian Journalists from Mostar and the Association of RS Journalists refused to join, and the Society of BiH Journalists was undecided at year's end.

Panelists noted the lack of a publishers' association in Bosnia. There is a positive example of an efficient industry organization, however, in the Association of Electronic Media, which actively represents the interests of its 87 members. Its greatest success achieved in 2004 was to change the BiH Electoral Law to electronic

Supporting institutions function in the professional interests of independent media.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists' rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are private, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

media to charge for political advertising services. Before the change, broadcasters were forced to provide ads free of charge.

Among the nongovernmental organizations (NGOs) supporting free speech and media independence are the Helsinki Committee for Human Rights, Media Plan Institute, Mediacentar Sarajevo, Centre for Free Access to Information, and Open Society Fund BiH. However, in smaller towns that have fewer NGOs, free speech advances more slowly. Overall in the country, the number of NGOs working on the protection and promotion of free speech is relatively low.

Panelists noted the lack of a publishers' association in Bosnia. There is a positive example of an efficient industry organization, however, in the Association of Electronic Media, which actively represents the interests of its 87 members.

Although five faculties of journalism exist in BiH—one in Sarajevo, one in Tuzla, one in Mostar, and two in Banja Luka—the quality remains poor, according to the panelists. The knowledge and professional skills of graduates are insufficient for their independent work. Another disturbing fact is the lack of communication between the media industry and educational institutions.

Among the short-term journalism training courses is the Media Plan Institute's school of journalism, which gathers attendees from the regions. Mediacentar launched a training program for media managers and investigative journalists. Internews organized training for journalism students at the Sarajevo Faculty of Political Science. A project run by the Mediacentar Sarajevo in cooperation with the Media Center Belgrade and Investigative Journalism Centre from Zagreb produces the Online Journalism Resource Center at www.netnovinar.org.

Most transmitters for RTV program broadcasts are owned by the state, but some commercial media also have their own systems of program transmission. Access to the Internet is not subject to any monopoly. Panelists said there is a sufficient range of private firms engaged in newspaper distribution. Sources of newsprint and printing facilities are private, although there is a division among printing facilities that reflects the political division in the media sector in general.

Panel Participants

Senad Péanin, director, *Dani* magazine, Sarajevo

Amir Zukić, editor, PBS, Sarajevo

Zoran Udovičić, director, Media Plan, Sarajevo

Borislav Kontić, director, Mediacentar, Sarajevo

Fuad Kovačević, member of management, Independent Union of Professional Journalists, Sarajevo

Jasna Kilalić, Democracy Office, USAID, Sarajevo

Edisa Šikalo, complaint officer, Press Council, Sarajevo

Dino Dipa, director, Prismresearch, Sarajevo

The opinions of the following research participants, who did not take part in panel discussion, were used in preparing this report:

Mehmed Halilović, Assistant Ombudsman for Media, Sarajevo

Emir Habul, editor, BH Radio 1, Sarajevo

Moderator

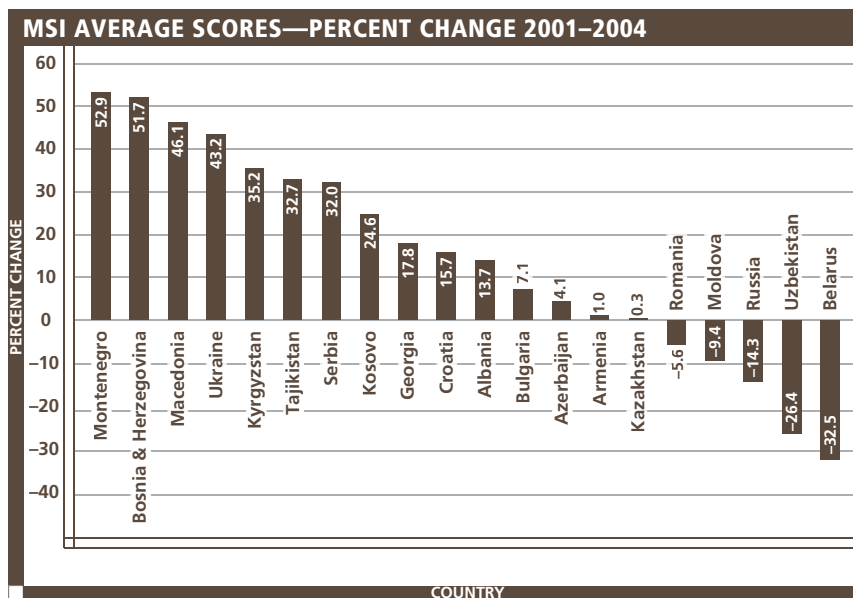
Tarik Jusić, program director, Mediacentar Sarajevo

Disclaimer: The views and opinions presented in the chapter on Bosnia and Herzegovina are those of the panel participants and do not necessarily reflect the views and opinions of the Mediacentar Sarajevo.

BOSNIA AT A GLANCE

GENERAL

- **Population:** 3,832,301 *Agency for Statistics of Bosnia and Herzegovina; June 30, 2003*
- **Capital:** Sarajevo
- **Ethnic groups (% of population):** Bosniaks 48%, Serbs 37.1%, Croats 14.3%, other 0.6% *CIA World Factbook*
- **Religions (% of population):** Muslims 40%, Orthodox 31%, Roman Catholics 15%, other 14% *CIA World Factbook*
- **Languages (% of population):** Bosnian, Serb, Croat (no percentage data)
- **Gross National Product:** US\$7,070 million (2003 data) *Bulletin No. 3; Central Bank of BiH; 2004*
- **GNP per capita:** \$1,845 (2003 data) *Bulletin No. 3; Central Bank of BiH; 2004*
- **Literacy rates:** 94.6% for population over age 15, 99.6% for population between age 15 and 24 (2002 data) *UNDP Human Development Index*
- **President or top authority:** Tri-partite rotating (each eight months) presidency; current president: Borislav Paravac (Serb); other two members: Sulajeman Tihic (Bosniak) and Dragan Covic (Croat)
- **Next scheduled elections:** 2006



MEDIA

- **Newspaper circulation statistics (total circulation and largest paper):** Official circulation statistics are not available.

READING RATES OF DAILY NEWSPAPERS (from at least once a week to every day):

Dnevni Avaz 40.2%, *Vecernje Novosti* (S&M) 11.9%, *Oslobodenje* 9.8%, *Vecernji List* (Croatia) 9.3%, *Blic* (S&M) 8.0%, *Glas Srpski* 7.8%, *Nezavisne Novine* 7.7% (Research conducted September 13–22, 2004 – Mareco Index Bosnia)

READING RATES OF MAGAZINES (from at least once a week to every day):

Gloria (Croatia) 16.1%, *Azra* 12.3%, *Expres* 9.2%, *Slobodna Bosna* 9.1%, *Dani* 8.1% (Research conducted September 13–22, 2004 – Mareco Index Bosnia)

- Viewing/listening rates (three stations with the best ratings):

TELEVISION STATIONS:

Federal TV: 23.8% viewing rates; Croatian TV (I and II programs) (Croatia): 10.5% viewing rates; TV Pink BiH: 10.4% viewing rates (2004 data – Mareco Index Bosnia)

RADIO STATIONS:

BH Radio 1: 8.5% listening rates; RTV BN: 6.8% listening rates; Nes Radio: 3.8% listening rates (Research conducted August 15–23, 2004 – Mareco Index Bosnia)

- **Number of print outlets, radio stations, television stations:** There are seven daily newspapers, 46 weekly and monthly newspapers, 42 television stations, and 141 radio stations.

- **Annual advertising revenue in media sector:** NA. According to estimates, between 30 and 40 million KM net (15 to 20 million euro), while gross value amounts to around 60 million KM (30 million euro).

- **Number of Internet users:** 100,000 (2002 data)

- **Number of information agencies:** 7

