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KOSOVO

On April 19, 2013, Kosovo's Prime Minister Hashim Thaçi and Serbia's Prime Minister Ivica Dačić reached a landmark agreement. After 10 rounds of talks chaired by Catherine Ashton, the EU high representative, both prime ministers signed the 15-point agreement that aims to normalize relations between the two countries. Global political organizations, such as the UN, NATO, the European Council, and others, considered this a historical event and praised both leaders for their courage. By the end of the year, four US congressmen officially nominated Ashton, Thaçi, and Dačić for the 2014 Nobel Peace Prize for their efforts in improving relations between Kosovo and Serbia.

At home, though, the agreement was highly disputed. Although the Kosovo Assembly ratified the agreement, the opposition party, Vetvendosje, opposed the ratification and tried to block it. Those against the agreement feared that Kosovo was being divided along ethnic lines, as part of the agreement included the creation of an association of Serb majority municipalities. A positive outcome of the agreement was the participation of four Serb majority municipalities of the North in the November 2013 local elections. It marked the first time that Serbs participated in organized elections in Kosovo. Previously, they had boycotted all elections, as advised by the Serbian government; under the terms of the agreement, the Serbian government has committed to play the opposite role.

The elections proved to be another significant milestone of 2013, in the sense that most experts regarded them as one of the best organized elections, with the exception of a serious incident that occurred in the North. In this incident, a group of Serbs entered into a polling station and stole or destroyed ballot boxes and election materials while terrorizing the election organizing committee. A local journalist captured the whole event on camera.

In every election, the media's integrity is scrutinized. Both local and foreign observers agree that the media covered the election campaign well, providing equal space to all of the candidates' activities.

The overall average score for Kosovo increased slightly over last year's MSI study. The panelists highlighted the new law on the protection of journalism sources, adopted last year, as important progress. On the other hand, the new draft-regulation of the Independent Media Commission, which intends to increase the licensing fee for broadcast media, has received harsh criticism, considering the already difficult financial situation for broadcast media operating in Kosovo. This is the reason why Objective 4 (business management) has traditionally received the lowest scored low in Kosovo, and it did again this year. Apart from that, Kosovo citizens enjoy a variety of news sources (Objective 3; score: 2.90), the media community enjoy a great deal of support from NGOs (Objective 5; score: 2.58), and the quality of professional journalism has stayed more or less steady (Objective 2; score: 2.32).

KOSOVO at a glance

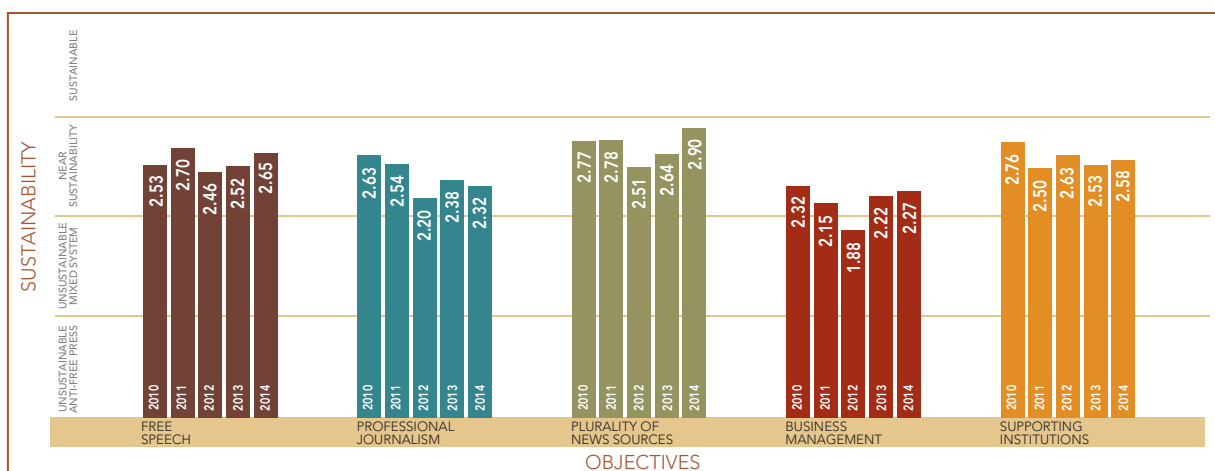
GENERAL

- > Population: 1,859,203 (July 2014 est. *CIA World Factbook*)
- > Capital city: Pristina
- > Ethnic groups (% of population): Albanians 92%, Other 8% (2000 est., *CIA World Factbook*)
- > Religions (% of population): Muslim, Serbian Orthodox, Roman Catholic
- > Languages: Albanian, Serbian, Bosnian, Turkish, Roma
- > GNI (2012-Atlas): \$6.508 billion (World Bank Development Indicators, 2013)
- > GNI per capita (2012-Atlas): \$3,600 (World Bank Development Indicators, 2013)
- > Literacy rate: 91.9%; male 96.6%, female 87.5% (2007 census)
- > President or top authority: President Atifete Jahjaga (since April 7, 2011)

MEDIA-SPECIFIC

- > Number of print outlets, radio stations, television stations: Print: 8 daily newspapers; Radio Stations: 83; Television Stations: 21 (Independent Media Commission, 2012)
- > Newspaper Circulation Statistics: *Koha Ditore* is the leading newspaper, followed by *Kosova Sot* (Index Kosova, July 2009)
- > Broadcast Ratings: RTK 52%, KTV 28%, RTV21 49%; Radio Dukagjini 8%, Radio Kosova 5%, Radio 21 2% (Index Kosova, 2009)
- > Annual advertising revenue in the media sector: N/A
- > News agencies: Kosovo Live, Kosovo Press
- > Internet Usage: 377,000 (Dec. 2008 est., Internet World Stats)

MEDIA SUSTAINABILITY INDEX: KOSOVO



MEDIA SUSTAINABILITY INDEX 2014: OVERALL AVERAGE SCORES



CHANGE SINCE 2013

▲ (increase greater than .10) □ (little or no change) ▼ (.10)

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.

Scores for all years may be found online at http://www.irex.org/system/files/EE_msiscsres.xls

OBJECTIVE 1: FREEDOM OF SPEECH

Kosovo Objective Score: 2.65

In general, Kosovo enjoys good legal and social protection of free speech, which is quite harmonized with EU and international standards. Freedom of speech, the right to access public information, and media pluralism are each regulated in article 40-42 of the Constitution of Kosovo. This is the reason why Objective 1 received the second-highest score, 2.65, from this year's MSI panel. The media operating environment is generally well-regulated; there are written rules with regard to media licensing and registration procedures, there are certain tax breaks for media organizations, crimes against journalists are mostly limited to the level of threats, entry into the journalism profession is free of any sort of governmental interference, and there are no restrictions for accessing international news and news sources.

Apart from Kosovo's constitution, there are specific laws that also guarantee the freedom of speech. One reason why such laws are compatible with international standards is that an EU expert is always engaged in the process of drafting bills. One specific law that the Kosovo Assembly adopted in 2013 is the law on the protection of journalism sources. The panelists see this as a significant step, because the new law guarantees journalists and other media professionals the right to remain silent regarding their sources of information, and they cannot be obliged to reveal the identity of their

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and social protections of free speech exist and are enforced.
- > Licensing or registration of media protects a public interest and is fair, competitive, and apolitical.
- > Market entry and tax structure for media are fair and comparable to other industries.
- > Crimes against media professionals, citizen reporters, and media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
- > The law protects the editorial independence of state of public media.
- > Libel is a civil law issue; public officials are held to higher standards, and offended parties must prove falsity and malice.
- > Public information is easily available; right of access to information is equally enforced for all media, journalists, and citizens.
- > Media outlets' access to and use of local and international news and news sources is not restricted by law.
- > Entry into the journalism profession is free and government imposes no licensing, restrictions, or special rights for journalists.

sources or the origin of their information. The law also prohibits physical and non-physical searches of journalists' and media properties. Journalists are obliged to reveal the identity of a source of information only at the request of a competent court and only if that information is necessary to prevent a serious threat to a person.

Kreshnik Gashi, an editor and investigative journalist at the Balkan Investigative Research Network (BIRN), also praised changes made in the new Penal Code that allow photographers to record court hearings.

The media licensing and registration process is overseen by the Independent Media Commission (IMC), which is in charge of broadcast media only. Print media, news portals, and news agencies do not go through any licensing procedures, since they are registered as business enterprises. The panelists are very critical of the IMC's work, because they believe this institution is highly politicized. In December 2013, two board members, including the head of the board, were fired by the Kosovo Assembly—the body in charge of appointing them—on charges that they both violated the law when they ran as candidates during local elections in November. The EU Election Observation Mission in Kosovo criticized the work of the IMC as well, concluding that the IMC failed to take up its legal responsibility to oversee media performance and to review and adjudicate media-related complaints.

Furthermore, the panelists agreed that the IMC regulation on covering election campaigns is unclear and confusing. Gazmend Sylja, the editor-in-chief of KLAN Kosova—a private television station that the IMC fined for breaching the election silence—described how the IMC failed to make it clear what broadcast media can and cannot cover during the elections.

Ardita Zejnullahu, the executive director of the Association of Kosovo Independent Electronic Media (AMPEK), added that the IMC, in its inefficiency, is destroying Kosovo's media market—especially now, when Kosovo needs to adopt a law for switching to the digital broadcasting system.

There are tax breaks for media outlets in Kosovo. The government made a very important decision last year to exempt all broadcast media from the value-added tax (VAT). The panelists say that this is quite a release for broadcast media and an incentive for them to invest in the latest technology. Lavdim Hamidi, the vice editor-in-chief of the daily *Zëri*, noted, however, that this decision applies only to the importation of media equipment and is not applicable when equipment is bought from a local retailer. He suggests that the government should consider a reimbursement mechanism, since not all media outlets can import their equipment.

An IMC announcement of a draft regulation that aims to increase the licensing fee for broadcast media by three times sparked a major debate. This means that the annual fee for

a local radio station, for example, would increase from €540 to €1,620. Many local radio and television stations protested that a threefold increase in the licensing fee would be an unbearable hardship. The IMC has yet to confirm the decision.

The panelists agree that the number of crimes against journalists has been decreasing over the years. The word “crime” for them appears to be too harsh, considering that even in the past no journalist has been murdered and the most common crimes against media professionals come as threats. Investigative reporters often receive threats mostly from businessmen and other individuals who are suspected of being involved in corruption scandals.

Occasionally, the threats escalate into physical assaults. In one case, a businessman beat a KTV cameraman while he was filming a condominium being built in Pristina, allegedly with no legal permit. Although the perpetrator was held by the police and charged by the prosecutor, the panelists said that courts in Kosovo are overloaded with files and assign no priority whatsoever for cases involving crimes against journalists. Another problem, raised by Kreshnik Gashi, is that Kosovo journalists do not feel safe enough to report from the North, which is a predominantly Serb-populated area. During the local elections in 2013, Kosovo Albanian journalists, in particular, had very limited access in the North, where Serbs killed an EULEX police officer just before the local elections.

As of 2013, there were two public television channels in Kosovo. The former Radio Television of Kosovo (RTK) is now RTK1 and RTK2. The latter is a Serbian-language channel and broadcasts only via cable, while the former is mostly in Albanian and has a national frequency, in addition to a satellite version intended for the diaspora community.

Although the law on public broadcasting protects the editorial independence of public media, the same law says that public media, which consist of two television and two radio channels, shall be financed from the state budget until the board members suggest to the Kosovo Assembly a viable financing option. For the panelists, a heavily politicized board on the one hand and the state financing on the other hand are jeopardizing the public media’s editorial independence.

However, Mentor Shala, the general director of RTK, insisted that the public media provide independent and balanced reporting, as well as equal space for all political parties. Other panelists disagreed, saying that the RTK board is just for décor, with members who lack basic knowledge on media operations. Krenar Gashi, the director of the think tank INDEP, said that after 2008 the regulatory authorities have abused their role, tilting in favor of political parties in power. This has led to the degradation of public television, he emphasized.

According to Kosovo’s law, the Civil Code regulates libel. There was a previous tendency to try to make libel a criminal matter, but journalists’ associations managed to advocate against it. The problem, however, is that the number of libel cases against journalists is increasing, and the burden of proof, according to Kosovo’s legal standards, falls upon accused journalists. The panelists said, though, that this practice should be changed, because it is very time-consuming and costly for journalists.

Online news portals, which, unlike traditional media, lack an editorial team, are frequent targets of libel charges by public officials and businesspeople. When public figures come under fire, it has become a typical response for them to file charges against the media reporting on the issue, to create a public impression that they are innocent. Furthermore, they do not need to provide any proof of their claims in court, since the burden of proof falls upon the plaintiff.

The panelists described a case that is a typical example. Last year, Indeksonline, an online news portal, announced plans to publish an article showing evidence that linked the head of the Kosovo Intelligence Agency (KIA) with corruption. Before the story was published, the owner of Indeksonline, Faton Shoshi, was asked to report to the AKI headquarters. An AKI car was sent to bring him in, and on the way to the agency the driver kept threatening him. After realizing that he was followed by Shoshi’s reporters, the driver stopped and forcefully took their camera. After this, Shoshi refused to continue the journey and considered the incident an act of kidnapping. The Association of Kosovo Professional Journalists condemned the case.

The law regulates access to public information, but the panelists expressed disappointment that the law is limited to access to public documents only. Another problem is that public documents are not accessible online, especially budget spending reports, which public institutions rarely publish on their websites. Although all journalists have equal access to information, the problem lies within the public institutions, which stall and delay in providing their responses. The lack of an official spokesperson of Kosovo’s government makes it even more difficult for journalists to gain certain information.

On the other hand, there are no government restrictions of any kind to deny media’s access to international news and news sources. Citizens also have access to foreign television channels, which are part of cable packages. The government also does not impose any restrictions or licensing criteria for entry into the journalism profession. Even citizen reporting is practiced nowadays through social media.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Kosovo Objective Score: 2.32

The overall score for professional journalism shows that journalism in Kosovo more or less meets professional standards of quality. In general, reporting is fair and objective, especially in broadcast and print media, where journalists follow certain ethical standards. This is not the case with online news portals, which are famous for massive copyright breaches. Besa Luci, editor-in-chief of Kosovo 2.0 magazine and blog, said that many online news portals pretend to be doing journalism, while most of them only copy and paste news from other sources.

In general, reporters tend to comply with journalism standards, in the sense that they try to include comments from all relevant parties to a story. The problem the panelists raised is that a lot of stories are built on anonymous sources, a practice that is becoming commonplace. Luci believes that around 70 percent of stories are based on anonymous sources, and this practice is affecting media credibility.

On the other hand, journalistic organizations adhere to written ethical standards, which are in line with other internationally accepted ethical standards. Last year, the Council of Kosovo Print Media updated its code of ethics, making it more comprehensive. All print media subscribe to this code. RTK, the country's largest media organization, has its own code of ethics. Broadcast media tend to have their own ethics codes, but most online news portals and other news agencies do not have any written code of ethics. To this day, they remain unregulated.

Self-censorship is evident among journalists, mostly due to their perceived fear of losing certain political or business

support. In such cases, editors pressure journalists to practice self-censorship. For journalists, especially local media, low salaries also contribute to self-censorship.

The case of IPKO vs. Koha last year showed a clear example of business organizations' revenge toward a critical media outlet. IPKO is one of Kosovo's largest cable providers, as well as a provider of mobile and Internet communications. It is the only private provider of mobile telecommunications services, and, along with the state-owned company VALA, is an oligopoly in mobile telecommunications. Koha group, on the other hand, owns KTV—a national television station—and *Koha Ditore*, one of the highest-circulating newspapers. When Koha ran a story alleging that IPKO engaged in some corrupt practices in its attempt to expand its media market in Kosovo, IPKO responded by withdrawing all ads from the newspaper and shifting KTV from number 3 to number 83 in cable's list. This was a clear act of revenge, which the panelists and media organizations highly condemned at that time. After harsh criticism by media experts, IPKO eventually changed KTV's place to number 8.

Traditional media appear to cover all key events and issues, local and international, with one exception: the North. This Serb-populated part of Kosovo, where Kosovo's authority is not recognized, has suffered from heavy violence. Kosovo journalists face real danger when they cover news from that area. They faced a real test when covering the local elections in November and December 2013, in which Serbs took part for the first time. Sylva said that he did not dare to send any team to the North because he feared for their lives, leaving this as an option for journalists who wished to go there.

Journalists' low pay levels are another reason why they are not willing to take such risks. The panelists also underscored a striking disparity in salary levels for public and private media professionals. While salary levels in public media range from €600 to €900, the average salary in private national radio and television stations is around €300. In newspapers, it is between €150 and €200, the panelists said. In local media, the average salary tends to be even lower. However, journalists are generally paid the same as other professions, such as civil servants, police, teachers, and doctors, whose monthly income ranges from €300 to €400. Poor income for journalists has been the primary reason why a number of them have left the profession for certain positions in the public or business sector. Another problem raised by the panelists is that media owners do not adequately respect the labor law, meaning that there are still journalists working without proper work contracts.

Overall, people get news when they need it. There is a balance in the media between news and entertainment programming; the latter does not eclipse the former. This aspect of the media is well regulated, because the IMC has a strict regulation that all licensed broadcast media must

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 and retain qualified personnel within the media profession.
- > 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 exist (investigative, economics/business, local, political).

comply with. In addition, the IMC closely monitors the time television stations spend on commercial activities, which is 12 minutes per hour for private television stations and six minutes for public television stations.

The panelists agreed that media organizations have good facilities and equipment for gathering, producing, and distributing news. The VAT abrogation for media also has reduced the import cost of the latest technologies.

It is unusual for journalists to specialize in a specific field. Media organizations today tend to look for “generalist” journalists—those who are able to cover all sorts of issues, be it politics, business, health, or education. Investigative reporting, however, is becoming more professional. One particular media outlet that specializes in investigative reporting, BIRN, has increased the variety of channels after launching the online newspaper version of its famous *Life in Kosova* television program.

OBJECTIVE 3: PLURALITY OF NEWS

Kosovo Objective Score: 2.90

Objective 3 received the highest score of all MSI objectives. Indeed, the score shows not only a significant increase from last year, but an overall achievement of plurality on news, compared with all previous years. The number of mediums has been increasing over the years. Along with traditional media, social media, the Internet, and access to news via mobile devices have all increased rapidly. Although the number of online news portals is increasing, the panelists did not necessarily see this as progress, because the quality of

MULTIPLE NEWS SOURCES PROVIDE CITIZENS WITH RELIABLE, OBJECTIVE NEWS.

PLURALITY OF NEWS SOURCES INDICATORS:

- > Plurality of public and private news sources (e.g., print, broadcast, Internet, mobile) exist and offer multiple viewpoints.
- > Citizens’ access to domestic or international media is not restricted by law, economics, or other means.
- > State or public media reflect the views of the political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for media outlets.
- > Private media produce their own news.
- > Transparency of media ownership allows consumers to judge the 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
- > The media provide news coverage and information about local, national, and international issues.

journalism on many online outlets is poor. Due to the lack of an overseeing body, most of these online outlets do not have any editorial team, and the ownership is very non-transparent.

Today, the public media consist of two television channels and two radio channels. RTK has become RTK1 and RTK2, the latter a television channel in the Serbian language. In addition to RTK2, the Serb community has other private radio and television channels, including the well-established local Radio Kim in Gracanica, which is now testing its own television channel. There are no newspapers, however, in the Serbian language. In fact, there are no local newspapers at all, only nine daily newspapers with national coverage. Magazines also exist, but their content is limited mostly to show biz, business, and religious issues. The market in Kosovo is not very friendly to magazines; some do not survive long because of financial problems and because subscriptions do not generate any substantial income. Perhaps the most common source, although with limited credibility, is now online news portals, which tend to post truncated versions of important news covered by the traditional media. In this context, people now rely heavily on social networking tools, such as Twitter and Facebook, which are used as platforms for debates and discussions among their users. As the panelists said, this is possible because the Internet has enjoyed a massive penetration rate, with over 70 percent of all households connected to the Internet.

The variety of public and private news sources allows citizens to check the news, and to obtain and compare multiple viewpoints. Even individual media outlets allow multiple perspectives in their editorial policies, especially when it comes to providing various political viewpoints about a particular issue.

There are no government restrictions whatsoever on accessing domestic or international media and news sources, accessing any Internet features, or owning a satellite dish. However, the panelists raised two issues that can restrict, to some degree, citizens’ access to the media. First, the monthly fee for a cable service package, including Internet access, is still high, considering a family’s average income. Second, RTK, although required by law, has failed to spread its signal to the whole territory, leaving many families without the terrestrial signal. Shala, from RTK, said that this is not RTK’s fault, because there is a special body called the network of terrestrial broadcasters that is responsible for spreading the signal all over the country. This network is a composition of all licensed broadcast media.

There are legal provisions that regulate the public media to serve the public interest, although most of the panelists criticized the public media, feeling that state financing is jeopardizing editorial independence. Even the EU local election observing team criticized RTK for having a positive tone when covering the activities of the ruling party. Shala, however, insisted that RTK tends to provide equal space to all political parties.

There are news agencies that gather and distribute news for national and local media in the country. There are two main news agencies in Kosovo, Kosova Live and Kosova Press. Both agencies provide other media outlets with reports that are believed to be editorially independent. The subscription fee is affordable for most media outlets, which in return receive print, video, and online news content. The main problem is that in most cases, media outlets fail to cite them as sources of information. On the other hand, international news agencies, such as Reuters, AP, and AFP, are used only by larger media organizations that can afford such services.

The panelists agreed that private media, especially those with national coverage, are not very dependent on news agency services. Almost all private media, national and local, produce their own news and information programming. Even bloggers and online media produce their own content, which sometimes becomes a matter of wider public debate after being picked up by other media.

With regard to the transparency of media ownership, the panelists agree that in general this is well regulated, at least as far as broadcast and print media are concerned. Broadcast media, including cable providers, are overseen by the IMC, which requires detailed information about the owners. Print media are registered as businesses, and their ownership is generally known to the public.

Only a few business conglomerates own media outlets, but the level of interference with media management and the editorial team is not that visible. However, ownership is not very transparent when it comes to online news portals.

In general, the media cover a broad spectrum of social interests, including issues that a few years ago were considered taboo themes, such as religion, ethnicity, and sexual orientation. Today, there is no resistance to covering such issues in the media, as long as there are opinion makers who publicly debate them. In addition to these topics, citizens are able to get all sorts of news regarding their hometown, municipality, national issues, and international developments, and there are also media in the minority languages that serve minorities' interests. This is mainly due to the existence of many local and community radio and television channels.

OBJECTIVE 4: BUSINESS MANAGEMENT

Kosovo Objective Score: 2.27

Objective 4 scores remained about the same compared with last year. However, according to the panelists, business management is still the least developed feature in terms of media sustainability; thus, this objective still received a lower score than the other MSI objectives.

To a certain extent, media outlets operate as efficient and self-sustaining enterprises. This is especially true for public media, which enjoy multiple revenue sources, including a guaranteed annual budget from the state budget, around six minutes of advertising time per hour, and the right to produce private programs as well. Two national television stations, most national newspapers, and cable operators manage to function well as enterprises, and in addition to their journalists and technical experts, they employ trained accounting and marketing personnel.

Local media, on the other hand, face less favorable conditions, because their revenue sources are not very sustainable. Zejnullahu mentioned the case of TV Prizreni, a local television station that is in particularly bad financial shape. For this, Zejnullahu places a certain amount of the blame on the IMC, which has never conducted a proper market analysis. In Prizren, a town of fewer than 200,000 people, the IMC has licensed five local televisions, which is more than the market can absorb. Furthermore, unlike their national counterparts, most local media do not have any other staff besides journalists and technical experts. They simply cannot afford them. Krenar Gashi believes that the local media do not prepare business plans like national media, either; they just live day by day.

Private media do not rely on subscriptions, for the most part; they are not yet considered an important source of revenue. Advertising revenue is their main income. Private television stations are allowed 12 minutes of advertising time per hour, which is closely monitored by the IMC. In the past, broadcast media often have been issued fines for exceeding the allowed commercial time.

Other than ads, there are no government subsidies for private media. The panelists say that government ads,

MEDIA ARE WELL-MANAGED ENTERPRISES, ALLOWING EDITORIAL INDEPENDENCE.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets operate as efficient and self-sustaining enterprises.
- > 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.
- > Government subsidies and advertising are distributed fairly, governed by law, and neither subvert editorial independence nor distort the market.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor the product to the needs and interests of the audience.
- > Broadcast ratings, circulation figures, and Internet statistics are reliably and independently produced.

although not in the amount they used to be, are fairly distributed among Kosovo media outlets.

According to the existing law on public broadcasting, the public media have a guaranteed budget until 2014. By then, the RTK board must come up with a financing solution, which may be in the form of subscriptions. For the panelists, the current form of financing for the public media is clearly affecting the editorial independence of this medium. RTK2 is in a favorable position, though, because its budget is subsidized by RTK. There are no government subsidies for private media.

The number of companies that buy advertising is increasing. Foreign banks with branches in Kosovo, insurance companies, private colleges, telephone companies, and certain public agencies are the country's biggest advertisers. The government used to be a great advertiser before it opened a special web page where it posts all public calls for tenders and other services.

According to a recent study conducted by the IMC on the advertising market in Kosovo, more than 80 percent of large companies allocate a certain budget for advertising. So do around 65 percent of medium-sized enterprises, 53 percent of small enterprises, and 88 percent of micro-enterprises. The study shows that they advertise on local television stations (22 percent), national television stations (20 percent), local radio stations (17 percent), national newspapers (12 percent), national radio stations (14 percent), and the Internet (3 percent). In total, around €30 million is spent on advertising, according to this study.

Online media are gaining prominence in Kosovo's media market, as more advertisers show interest in buying ads on online news portals. However, Meriton Shoshi, a journalist for the Indeks online news portal, said that news portals are struggling to compete with traditional media to get ads from public institutions, and even when they win them, they do so at the lowest price possible.

There are no reliable market research companies, and market research is not well developed or used in strategic business planning. The same goes for broadcast ratings and circulation figures, which are not produced regularly and independently. Such figures are collected, but the panelists believe they are not reliable, as they tend to be influenced by the medium that orders such services. As a consequence, advertisers do not take them seriously.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Kosovo Objective Score: 2.58

Scores for Objective 5 remained static compared with last year. Trade associations representing the interests of media owners exist and tend to do a better job than journalists' associations, according to the panelists.

Most media outlets have their own trade associations that represent their interests. Hence, private broadcasters subscribe to the Association of Independent Electronic Media of Kosovo (AMPEK), print media have the Council of Print Media, and RTK has its own trade association. AMPEK is one of the largest and most active trade associations; it advocates for policies in favor of private broadcast media. It became very vocal when the IMC introduced a new draft regulation that seeks to more than double the license fee for all broadcast media and cable operators. The new tariffs were considered too high, especially for local and community media.

As for journalists' professional associations, there are two: the Association of Kosovo Professional Journalists (AGPK) and the Union of Kosovo Journalists (UGK). Although the main role of these organizations is to protect journalists' rights and raise their voices, especially when crimes against them are committed, they also provide training and other educational activities for their members. AGPK is the larger of the two; most accredited journalists belong to AGPK. Last year, it gained a new president and a new board.

The panelists said, though, that AGPK was not very active last year and lacked credibility after electing a controversial head of the association. Some of its members publicly criticized the new president as being too close to the ruling party and not representing journalists' interests. Some board members even resigned as a result of the new president's close association with the ruling party.

Shala said that under the current circumstances, it is difficult to lead this organization, because journalists tend to try to protect the interests of the media they work for. Again this year, the

SUPPORTING INSTITUTIONS FUNCTION IN THE PROFESSIONAL INTERESTS OF INDEPENDENT MEDIA.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of media owners and managers and provide member services.
- > Professional associations work to protect journalists' rights and promote quality journalism.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs exist providing substantial practical experience.
- > Short-term training and in-service training institutions and programs allow journalists to upgrade skills or acquire new skills.
- > Sources of media equipment, newsprint, and printing facilities are apolitical, not monopolized, and not restricted.
- > Channels of media distribution (kiosks, transmitters, cable, Internet, mobile) are apolitical, not monopolized, and not restricted.
- > Information and communication technology infrastructure sufficiently meets the needs of media and citizens.

panelists emphasized the lack of a trade union representative of all journalists, regardless of the type of media they work for.

Kosovo has a huge number of registered NGOs that support free speech and media independence and advocate for laws in the media's favor, but only a few of them are truly active. Those that are active have cooperated with the media sector to support the freedom of speech. Some of the most prominent think tanks and NGOs, including the GAP Institute (organizers and authors of the MSI study), INDEP, KIPRED, and BIRN, have produced a number of publications addressing the freedom of the press. Perhaps their biggest contribution was their involvement in reviewing legislative changes on media. The panelists mentioned that it was a good sign of cooperation when media organizations, along with NGOs, reacted in the case of IPKO vs. KTV/Kohavision (when IPKO moved KTV from channel 3 to 83, far outside of the 1–4 channel listings for national networks). Sylva said that since NGOs need the media, and the media need opinions from experts working at NGOs, they have created an alliance of good communication and cooperation.

One public and two private providers of higher education offer journalism studies, providing theoretical and practical training for new journalists. Three journalism degree programs are offered in Kosovo, the largest of which is at the public University of Pristina. However, the technical infrastructure for conducting practical work is poor, and students are unable to practice and demonstrate their knowledge, said Besim, a lecturer of journalism at the University of Pristina and a journalist with Voice of America. Nevertheless, the employment level of graduates from the public university is satisfying. Around 70 percent of all graduates find employment, according to Muhamet Jahiri, president of the Kosovo Journalists' Union (UGK).

In addition, larger media outlets offer in-house training to help young journalists upgrade their skills. The OSCE, EBU, and other organizations offer short-term trainings. RTK has its own center for professional training that is available to its staff, as well as to many journalism students who do their internships there. Klan Kosova TV also accommodates a great number of students for internships, said Sylva.

Apart from financial restrictions, there are no other restrictions on importing and purchasing materials that journalists need, or on printing facilities. The existing printing and publishing houses are privately owned and tend to be apolitical in their business endeavors. Luci said that there is no competition among printing houses.

Channels of media distribution, especially kiosks, cable, and Internet providers are apolitical, and the state does not interfere with them. The panelists raised the issue of switching from analog to digital broadcasting, which should be completed by 2015. So far the IMC, which is responsible

for carrying out this project, has introduced only a draft strategy, which the broadcast media disputed. Zejnullahu blamed both the government and the IMC for not applying for IPA funds, which are exclusively aimed at financially helping broadcasters buy the new technology necessary for digital broadcasting. All other countries in the region have benefited from such funds, while in Kosovo the responsible institutions have not even applied, Zejnullahu added.

Lastly, the existing ICT infrastructure is quite modern and meets the needs of the media industry. The Internet penetration is relatively high, with over 70 percent of households believed to have Internet access, and Internet speed is quite good.

List of Panel Participants

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Mentor Shala, general director, Radio Television of Kosovo, Pristina

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