
Issues highlighted by the panelists this year include an alarming lack of media ownership transparency, questionable patterns of government financing, and political control over the public broadcasters—and failure to reform the institution and provide a sustainable mode to collect public broadcast fees.



BOSNIA & HERZEGOVINA

A continuous political deadlock in Bosnia and Herzegovina (B&H) still impedes much needed political, economic, and judicial reforms and compromises B&H's path toward the European Union (EU)—even twenty years after the adoption of the Dayton Peace Agreement, which administratively split the country's territory into two entities—the Federation of B&H (FB&H) and Republika Srpska (RS)—each with its own government bodies, and Brčko District as an additional administrative unit. While in FB&H a crisis concerning political representation continued throughout the post-election year, officials from RS approved holding a referendum on the legitimacy of laws supported by the High Representative of the international community and whether B&H courts and the Prosecutor's Office have jurisdiction over RS residents. While declared by the government of RS as a lawful response to outside interference in RS's internal affairs, international actors and FB&H see it as a continuation of sectarianism and political destabilization of the country. In February 2016, the referendum was indefinitely postponed after intervention from the B&H Constitutional Court and the Office of the High Representative.

Political tension and security threats deepened after attacks on police stations (April 2015 in Zvornik and November 2015 in Zavidovići) and on army forces (November 2015 in Sarajevo) by men suspected of being radical Islamists, with the institutional response deemed inefficient and lacking coordination between different administrative levels.

Nevertheless, a Stabilization and Association Agreement (SAA), entering into force in June 2015, confirmed the country's status as a potential candidate for EU membership. After many failed attempts at progress, the Reform Agenda proposed by the EU, aimed primarily at boosting the economy, was adopted by all three levels of government (B&H, FB&H and RS) and should be implemented by 2018. The reforms required a new labor law, which both B&H entities passed before the end of 2015, over the protests of workers on stipulations seen as limiting and retrograde in terms of the position and protection of workers. The youth unemployment rate reached over 60 percent (World Bank), continuing a negative trend.

Overall B&H achieved a score of 1.97 in this year's MSI. Unable to shake the same problems related to political and financial pressures, negative trends continued, although at a slower pace compared with previous years. Issues highlighted by the panelists this year include an alarming lack of media ownership transparency, questionable patterns of government financing, and political control over the public broadcasters—and failure to reform the institution and provide a sustainable mode to collect public broadcast fees. The objective concerning business performance fared the worst, given decreasing revenue sources, corrupt finance patterns, controversial audience measurement systems, and the migration of international advertisers to other markets and non-journalistic platforms.

BOSNIA & HERZEGOVINA at a glance

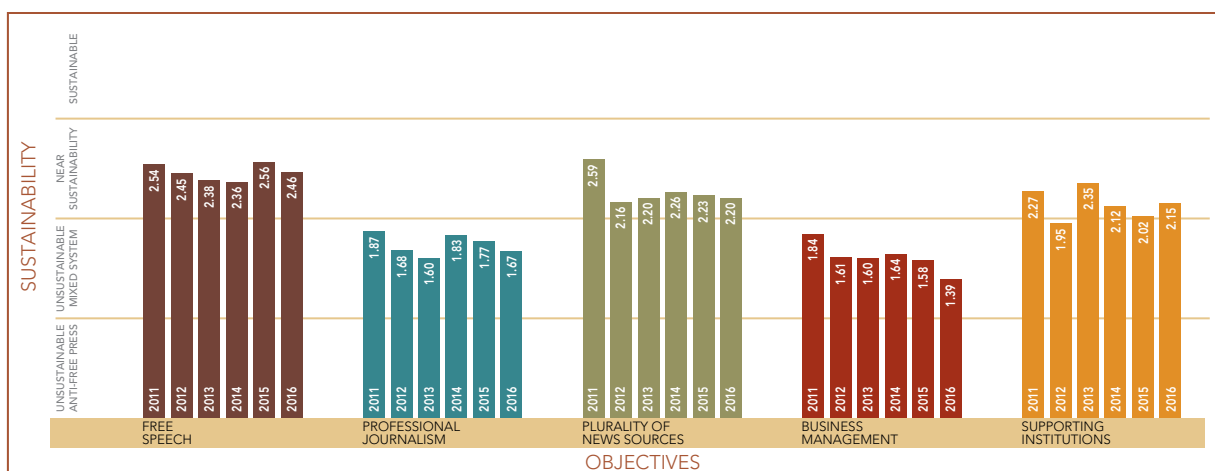
GENERAL

- > **Population:** 3,867,055 (2015 est. *CIA World Factbook*)
- > **Capital city:** Sarajevo
- > **Ethnic groups:** Bosniaks 48.4%, Serbs 32.7%, Croats 14.6%, others 4.3% (2013 est. *CIA World Factbook*)
- > **Religions:** Muslim 40%, Orthodox 31%, Roman Catholic 15%, other 14% (*CIA World Factbook*)
- > **Languages:** Bosnian, Croatian, Serbian (*CIA World Factbook*)
- > **GNI (2014-Atlas):** \$18.16 billion (World Bank Development Indicators, 2016)
- > **GNI per capita (2014-PPP):** \$10,010 (World Bank Development Indicators, 2016)
- > **Literacy rate:** 98.5%; Male 99.5%, Female 97.5% (2015 est. *CIA World Factbook*)
- > **President or top authority:** Members of BiH Presidency: Bakir Izetbegović (since November 10, 2010), Miladen Ivančić (since November 17, 2014), Dragan Čović (since November 17, 2014)

MEDIA-SPECIFIC

- > **Number of active media outlets:** 10 daily newspapers, 189 other print periodicals (Press Council of B&H, 2015); Radio stations: 144; Television stations: 43 (Communications Regulatory Agency, 2014)
- > **Newspaper circulation statistics:** N/A
- > **Broadcast ratings:** Top three television stations: RTVFBiH (11.96%), OBN (10.18%), Pink BiH (9.75%) (PeopleMeter between January and November 2015 by Audience Management, Fabrika)
- > **News agencies:** FENA (state-owned), SRNA (state-owned), ONASA (private), NINA (private), MINA (Islamic Community in B&H), KTA BK B&H (Conference of Bishops of B&H), Anadolu Agency (owned by Turkish government), Patria (private) (Press Council of B&H, 2015)
- > **Annual advertising revenue in media sector:** \$52.3 million in 2014: television 69.34%, print 12.66%, out-of-home 9%, radio 5%, online 4% (est. Fabrika)
- > **Internet usage:** 2,227,970 (Communications Regulatory Agency, 2014)

MEDIA SUSTAINABILITY INDEX: BOSNIA & HERZEGOVINA



MEDIA SUSTAINABILITY INDEX 2016: OVERALL AVERAGE SCORES



CHANGE SINCE 2015

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

OBJECTIVE 1: FREEDOM OF SPEECH

Bosnia Objective Score: 2.46

Freedom of speech scores in B&H dropped slightly over the past year. Implementation of existing laws regulating media freedoms is still limited, while journalists remained vulnerable to intimidation and threats due to the unsteady political and economic climate. The differences in scores between 2015 and 2016 are negligible for all nine indicators of this Objective, with the largest a decrease of about a half a point for indicator 4 (crimes against media professionals). Similarly, other annual international assessments reported no significant changes in the last two years in B&H. The World Press Freedom Index ranked the state of media freedoms in B&H 66th in both 2015 and 2014, while Freedom House assessed the press in B&H for both years as partly free.

Even though legal provisions guaranteeing freedom of expression are in place, most panelists agreed that they are far from being fully implemented.

There are serious concerns—underscored by the EU Progress Report—that the implementation of the new Law on Public Peace and Order of RS (which defines the Internet as a public space and can potentially criminalize social media postings that disturb public order) limits freedom of expression online

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.

and possibly affects freedom of assembly and association.¹ The interrogation of a journalist from Tuzla by the police because of a Facebook post revealing alleged connections of war criminals to RS police forces marked the first example of this law in action, although the case was later dismissed.

After a police raid of a news portal in December 2014 over a leaked recording concerning bribery of MPs to assure a parliamentary majority in RS, the FB&H government subsequently ruled that the raid was unlawful and in violation of human rights and national laws. Panelists and media organizations agreed that this case sparked increased solidarity, involving the professional community on both sides of the entity lines. The panelists cited this as a positive development for freedom of speech.

Broadcast licensing is one of the least problematic areas for the media in the country. Broadcast media in both entities are licensed and monitored by the Communications Regulatory Agency (CRA) of B&H, which has executive powers to enforce regulations applicable to electronic media. The agency is financially independent, and while it is often exposed to political pressure, analysts regard its decisions concerning licensing as generally fair. The CRA's director general is appointed by the CRA Council, and the appointment must be approved by B&H's Council of Ministers. The Council of Ministers failed to confirm the director for years, with the latest candidate proposed by the CRA Council refused in December 2015. Instead, a new intermediate director named by the Council of Ministers of B&H. CRA representatives, however, warn that the appointment of a new temporary director, while the old one is still in his mandate, is not in line with legitimate procedures.

Meanwhile, the government proposed a pre-draft law on electronic communications that would diminish the CRA's authority, prompting some concern among media freedom advocates that the agency could become more susceptible to politicization.² Despite considerable concerns about the draft law and its implications for politicization of the CRA, nothing happened in terms of its adoption during 2015.

There is no licensing required for print and online media outlets. They are self-regulated, with the Press Council (PC) of B&H handling complaints concerning published content, without any power to fine or suspend outlets breaching journalistic norms. Instead, it mediates between the complainant and the outlet, which often results in a retraction or publication of a response by the complainant. If

¹ "EU Progress Report for 2015." *European Union*. http://ec.europa.eu/enlargement/pdf/key_documents/2015/20151110_report_bosnia_and_herzegovina.pdf

² See more in OSCE B&H's legal analysis of the Pre-draft Law: http://www.oscebih.org/documents/osce_bih_doc_2013111909125073bos.pdf

Polarization of the media along political and ethnic lines continued after the general elections of October 2014. The panelists noted that the impunity for attacks and pressure on journalists is especially worrying, with a lack of thorough investigations and court prosecution.

mediation does not deliver results, the PC renders a decision on the content, which is for the most part published by the outlets in question. Entry into the market for media outlets is considered largely fair and not limiting for media freedom.

Political and financial pressure on B&H media continued in 2015. The Free Media Helpline, a program run by the B&H Journalists Association, recorded 16 threats and reports of pressure on the media and five physical assaults against journalists between January and November 2015.

Polarization of the media along political and ethnic lines continued after the general elections of October 2014. The panelists noted that the impunity for attacks and pressure on journalists is especially worrying, with a lack of thorough investigations and court prosecution. B&H Journalists reported that since 2006, 22 percent of attacks on journalists were never investigated, while 23.5 percent of cases were closed before perpetrators were identified.³ However, a positive final resolution in a few problematic cases gave hope to some panelists. For example, the dismissal of a case against a journalist in Tuzla, as well as a relatively prompt decision of the Municipal Court in Sarajevo that the equipment of a web portal confiscated by police should be returned, somewhat restored the shattered faith in institutional protection for media and journalists.

Independence of the three public broadcasters within the country's public broadcasting system is formally ensured, but politicization continues to poison appointments to managerial positions at the entity's public broadcasters. Political dependence is also problematic when it comes to local public broadcasters; 12 local television stations out of a total of 43 and 61 radio stations out of a total of 140 are directly funded by municipal or cantonal governments.

Reform of the public broadcasting system reform is still blocked, with no indication that the Corporation of Public

Service Broadcasting will be established as specified by the law. Prolonged problems also led to a significant decrease in the score for the independence of public media; for example, the FB&H Parliament failed to appoint members of the Steering Committee of RTVFB&H, leaving it with only one member. The mandate of the director general of RTVFB&H has expired, and the parliament has not yet agreed on nominees for the position. The Steering Committee of RTRS remains politically affiliated, and political control over RTRS and the lack of editorial independence are believed to be worsening, according to the EU Progress Report for 2015.

Libel was decriminalized in 2003, but libel cases under the civil law are still regarded as a considerable burden for media. Mehmed Halilović, a media law expert, estimated there are still around 100 cases per year. Other problems include spotty respect for the principle of resting the burden of proof on the plaintiff, inconsistent standards of assessing emotional distress, and a lack of independence in courts—and/or a lack expertise needed to deal with media-related cases.

Implementation of the Freedom of Access to Information Act remains uneven and is frequently limited by the right to privacy and protection of commercial interests of companies, with the test of public interest not being consistently applied. "It's more difficult every day to access ... any kind of ordinary information by telephone; the response is always 'send a request,' or that needs the approval of the director. Sometimes we are told the response is ready but they are waiting for the director or minister to sign it, and they wait for that for more than a month, and in the end we don't receive the response," said Merima Hrnjica, of the journalist of Center for Investigative Reporting (CIN). These complications discourage journalists from requesting official information.

Access to local and international news and news sources is unrestricted, which explains why this indicator routinely scores as one of the best among all the indicators in all five MSI objectives. Regulations on intellectual property are implemented fairly well in electronic media, but implementation in print and online media remains challenging. As in the previous year, the panelists mentioned republishing of their work without approval or adequate attribution. Jasmin Hadžiahmetović, editor of web portal of TV N1, described a case in which an RS media outlet published information that she worked hard to investigate; while they attributed it to N1 it did not provide her byline or any recognition of the days she spent working on the story. However, the panelists noted there is a slight improvement in attribution of republished journalistic pieces across different media platforms.

³ Pisker, Lidija. "Media Freedoms Still under Attack." *Kosovo 2.0*. Oct. 2015. www.kosovotwopointzero.com/en/article/1912/media-freedoms-still-under-attack-in-bosnia-and-herzegovina

In B&H, becoming a journalist is not restricted. There are practically no government requirements or licensing processes for journalists, and entry in the journalism profession is totally free. However, journalists sometimes experience difficulty gaining access to government events and proceedings. On some occasions, access to public events has been restricted for particular media or journalists, and while these practices were not deemed frequent in the past year, in one notable example journalists of BN TV and Serbia's Beta news agency are said to be still banned from covering events at the Presidential Palace of RS, according to Freedom House.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Bosnia Objective Score: 1.67

The quality of journalism, in terms of ethics of reporting, did not improve significantly over the previous year. Journalists and editors do not consistently apply professional standards, and self-censorship is on the rise. Journalism as a profession is not well recognized and journalists' salaries are on average low and irregular. Thus, the average score for Objective 2 showed just a slight decrease compared with 2015.

The Press Code sets out reporting standards, considered morally binding, for reporters, editors, owners and publishers for print and online media, while its implementation falls under the self-regulation system. The Press Council (PC) mediates between readers and media, in an effort to enable readers' complaints (estimated at a couple hundred each year) to be addressed by media

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).

outlets. The Complaints Commission of the PC further issues decisions on complaints directing the media to apologize for or retract stories; more often than not, the media comply. Electronic media work under the auspices of the CRA, which responds to complaints with warnings, fines and suspensions of licenses.

According to the panelists, ethical norms are inconsistently respected, with frequent use of unsupported claims or unreliable sources. In particular, there is a growing tendency to use social media posts as sources of information.⁴ "When Facebook appeared, everyone became a journalist and media outlet...and when you have forums, including all social networks, where you can write whatever you want, hiding behind a nickname... It leads to general social chaos..." said Senad Zaimović, general manager of Marketing Agency Fabrika.

The panelists pointed to media coverage of the November 2015 shooting of B&H army representatives in a suburb of Sarajevo as confirmation that many media have little respect for ethics (publishing unverified information, leaping to the assumption that the shooter was affiliated with an Islamist group, revealing names of victims, etc.) and strive for sensationalism. During the European refugee crisis throughout 2015, many media from the region of the Western Balkans (including B&H) labeled refugees "illegal immigrants" and implied their religious and ethnic background in their reporting, often presenting them as a potential threat, thus supporting negative stereotypes about refugees and ultimately contributing to their suffering and to the erosion of their status. Civil society, including journalism associations from the Western Balkans, urged media to follow professional ethics in reporting on refugees due to numerous examples of breaches of journalistic norms.⁵ For these reasons, the panelists marked the related indicator measuring how well journalists recognize and accept ethical standards fairly low.

The difficult economic situation, worsened by further withdrawals of international funding for media outlets, has resulted in diminished independence of the media from political and commercial influences. Commercial and political interests of advertisers contribute to increased self-censorship by journalists and editors. The other reason is that many incidents of violence and intimidation appear to be particularly directed against journalists who write stories

⁴ Tinjak, Ajdin. "Facebook statusi kao novinarski izvori." *Media.ba*. Nov. 2015. <http://media.ba/bs/magazin-mreze-i-web/facebook-statusi-kao-novinarski-izvori>

⁵ "Novinarska udruženja pozivaju na profesionalno izvještavanje o izbjegličkoj krizi." *Media.ba*. Sep. 2015. <http://media.ba/bs/magazin-etika/ne-cinite-stetu-molimo-vas>

“When Facebook appeared, everyone became a journalist and media outlet...and when you have forums, including all social networks, where you can write whatever you want, hiding behind a nickname... It leads to general social chaos...” said Senad Zaimović, general manager of Marketing Agency Fabrika.

implicating powerful business or political elites,⁶ making journalists and editors reluctant to report on war crimes and corruption in particular.

A majority of panelists believe that B&H media cover most key events, but the relevance and reliability of the published news is questionable. “All events are covered and that’s not a problem. The problem is the way it is interpreted,” said Srđan Puhalo, a blogger of Prime Communications and Frontal.ba. Newsrooms sometimes lack the funds to finance field research, and depend too heavily on secondary sources and news agencies. This creates a lack of plurality of insights and a tendency of some media to publish biased and one-sided information.

The blogosphere is still regarded as underdeveloped, but citizen journalists have on occasion provided valuable insights into current affairs. As Kovač mentioned, citizen journalism proved to be a good source of information during the dramatic floods in B&H in 2014. Photos and information shared by citizens via social media on the water levels in different towns were valuable, and usually the only news about flooded isolated areas across the country at the time.

Journalists receive lower salaries than many other professionals, despite holding higher degrees in many cases. The score for pay levels of journalists is the lowest among all indicators in all five MSI objectives, and almost one point lower than the overall country average. Partly due to the weak financial position of many media outlets, salaries are often paid irregularly. The average monthly net income for journalists is around €340, which is among the lowest on the scale of salaries of professionals having the same

⁶ A Difficult Profession: Media Freedom under Attack in Western Balkans. *Human Rights Watch*. Jul. 2015

level of university degrees. The average salary for teachers amounts to €410 and for interpreters up to €510.⁷ At the same time, public service jobs deliver a higher average salary, around €550 for public administration.⁸ For that reason, many experienced journalists seek better-paying jobs in different fields. An additional burden is that employed journalists are expected to produce more content, as media outlets employ fewer staff. “Salaries of journalists and other professionals in the media are, unfortunately, not enough to discourage corruption and to keep qualified staff in the media profession. Journalists are under stress every day, they do not have fixed working hours, they often face unpleasant and difficult situations and, on top of all that, they are paid very poorly. They are often forced to work for multiple media organizations because their salary is insufficient,” said Gordana Šarović, director of Technical Information Center of RTRS.

In response to the low quality of professional journalism, international donors have offered several regional and national award programs for journalists, such as the EU Regional Award for Investigative Reporting, ACCOUNT Journalists Award, SGIP USAID Award, etc., to support independent reporting in the country. USAID is the primary supporter of investigative reporting by CIN and Žurnal web magazine. CIN occasionally receives financial support from NED, EU, Balkan Trust for Democracy and other donors. Regional project such as SEE Media Observatory provide some grants for journalists as well.

Some exclusively news-oriented media outlets produce thorough, extensive and technically advanced programs (e.g. Al Jazeera Balkans, N1, Anadolu press agency, etc.). Public broadcasters have a legal obligation to balance between information and entertainment programs, but entertainment programs are believed to have taken a more prominent role on RTVFBiH than it would normally be desired for PSB. Entertainment content has grown more dominant on many private media outlets, following global trends of talent and reality shows produced in the region, as well as trivia and show-biz news. Considerable concerns over the content of reality shows have been expressed by groups of B&H citizens, demanding from media authorities via various online petitions to ban reality shows due to their

⁷ “Koje diplome su najplaćenije u BiH.” www.plata.ba/analize/koje-diplome-su-najplacenije-u-bih/50141

⁸ Pisker, Lidija. “Teachers in B&H: Lost in Legislation.” *Kosovo 2.0*. Oct. 2015. www.kosovotwopointzero.com/en/article/1895/teachers-in-bosnia-and-herzegovina-lost-in-legislation

violent and sexually explicit content.⁹ Assistant director for broadcasting of the CRA Asja Rokša Zubčević noted that a private television channel from B&H recently decided to change its program schedule in order to substitute news production with reality program broadcasts. And while this type of programming is a trend followed by many other media, news programming is still very much alive, but its professionalism, rather than the proportion, is the greater concern.

When compared to regional and world media, most B&H media lack technical capacities to produce and distribute high quality news. As mentioned by Boro Kontić, director of Mediacentar Sarajevo, the quality of picture received through broadcasting, with the exception of a few large commercial stations, is not great—with some programs nearly unwatchable on BH public broadcasters, compared to current global technical standards. Aside from internationally financed television stations (e.g. Al Jazeera or N1) and a few major locally-owned media, funds for facilities or equipment and their production are limited, in particular when it comes to local media covering small regions in the country. They tend to operate with equipment far inferior in quality to regional and global outlets.

In B&H, there are currently very few media outlets engaged in investigative journalism (primarily the Center for Investigative Journalism and Zurnal.info), and primarily international donors finance their work. Some political magazines involving investigative journalism are produced on public broadcasters (for example, *Crta* on BHRT or *Mreža* on FTV), while investigative journalism is close to nonexistent at private media outlets.

Journalists working in local newsrooms rarely specialize in specific topics. Rather, they work on different stories, usually driven by the demands of their editors, and have little opportunity to explore their areas of interest and become experts in certain fields. “There are few journalists who possess specialized know-how and focus only on a specific topic,” said Puhalo. As a result, specialized and quality reporting in areas such as justice or economic issues is extremely rare and irregular.

⁹ <http://ba.n1info.com/a72189/Vijesti/Vijesti/Peticija-za-ukidanje-Farme-u-BiH.html>. After numerous citizen complaints, CRA decided to limit the broadcast of reality shows between midnight and early morning hours.

OBJECTIVE 3: PLURALITY OF NEWS

Bosnia Objective Score: 2.20

The average score for Objective 3 virtually mirrored the previous year, with no significant differences between the scores of almost all indicators within this objective. Indicator 6 (transparency of ownership), which scored the lowest among all indicators within this objective—about a point lower than the objective average—proved to be the only exception. Similar to the previous year, Indicator 2 (unrestricted access to media) scored the highest, about a full point more than the objective average.

According to official data found on the Press Council B&H and CRA websites, there are 10 daily newspapers and 189 periodicals (e.g. magazines and publications, of diverse content), 43 television stations and 144 radio stations currently active in B&H. The exact number of online media is impossible to track, as online portals in B&H often do not comply with regulations on registration and there is no transparency of ownership. Many of them do not publish an Impressum and it is impossible to identify their owners, editors or journalists.

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.

The panelists mostly agreed that B&H citizens have an opportunity to choose among a variety of media outlets and compare the news in order to piece together a more complete picture, despite the fact that many media tend to present biased and one-sided content. "I think there are enough media and sources of information in B&H to compare. Whether or not the editorial policies of certain media allow the expression of multiple views varies, I think, from topic to topic," said Kovač. The level of awareness among citizens about the practices of one-sided reporting might be questionable if we take a look at the 2015 report of B&H Journalists on media freedom in B&H¹⁰ which indicated a higher level of trust in the media—80 percent—than in religious communities, non-governmental sector, international community, governmental institutions, political parties, or politicians.

In 2014, Internet penetration in B&H households reached 58 percent. Keeping in mind that the trend for the last decade is for Internet usage to increase by about two percent each year, it can be estimated that the total number of Internet users is higher in 2015. However, Rokša Zubčević said that the overall number of Internet users, especially in rural areas, still falls short of expectations. According to available data, there are 1.16 million Facebook users in B&H, which is an 80.5 percent Facebook penetration—with more than 500,000 unique visitors a day from B&H,¹¹ and Facebook is B&H's top-visited site.¹² In addition, users tend to rely increasingly on social networking tools for news.

Almost 3.5 million people now use mobile phones.¹³ The telecommunications sector has been liberalized, with a regulated framework constructed in line with current EU regulations, which has encouraged healthy competition driving down mobile broadband costs. There have been some concerns over possible concentration of ownership in media and related businesses, but so far nothing has been confirmed. Some indicate a trend of transfer of ownership over television distribution to larger companies.

There are no governmental restrictions of citizens' access to domestic or international media in B&H, and registration with the government is not required to access the Internet, own a satellite dish, or use any other type of media.

B&H should have digitalized its television signal by June 2015, but the process is still pending, making it hard for citizens in some parts of the country to watch the national public broadcasters (PBS) and other channels after June 2015. The first analog receivers were switched off in the first half of 2015, even though the digitalization process in B&H was not completed. Subsequent announcements indicated that the digital signal should be made available during 2016, but the announced test broadcasting in Sarajevo, Mostar and Banja Luka before the end of 2015 did not happen, raising further doubts about the process.

Other threats to unlimited access to media sources involve costs—still high when compared to low socio-economic standards in the country—a lack of infrastructure in some areas and low interest by distributors to expand their reach, and even restricted electricity in remote parts of the country that prevents citizens from using electronic media, the panelists reported.

The general perception of the panelists is that public media usually offer biased and one-sided information, thus putting the interests of the political elites before public interest. Doubts regarding the political bias of both entity broadcasters are constantly expressed, while the state PSB is rarely accused of such practices. The situation with the high number of local public media is even more complicated due to their direct financial dependence on cantonal/municipal governments, leading to a perception that they are operating as mouthpieces of the governing parties. The 2015 Media Integrity Matters report, conducted by the SEE Media Observatory, noted that political bodies which "should be under the scrutiny of local public media are precisely the ones who decide on their revenues."¹⁴ Financial sustainability of the three public service broadcasters has been dependent on the collection of RTV fees, which has been faced with increasing problems and alarming revenue losses over the years. While collection through landline phone bills was supposed to expire by the end of 2015, no solutions for collection afterwards had been found by the beginning of 2016, leaving PSB in a daunting position and possibly more directly dependent on the political elites. In January 2016, PSB announced that the same mode of fee collection will be in place until the new solutions are adopted. PSB proposed solutions such as collecting RTV fees through electricity bills or as taxes, but nothing had been confirmed by the time of the MSI study. The Law on RTRS stipulates the possibility of direct funding of RTR through the budget of RS.

¹⁰ "Mediji u BiH u 2015: medijske slobode, profesionalizam i izazovi." *BH Novinari*. May 2015. www.bhnovinari.ba/index.php?option=com_content&view=article&id=748%3Apredstavljani-rezultati-istraivanja-qmediji-u-bih-2015-medijske-slobode-professionalizam-i-izazovi&catid=63%3Adogaaji&Itemid=241&lang=bs

¹¹ MVF Global Customer Acquisition. www.mvfglobal.com/bosnia-herzegovina

¹² Alexa.com. www.alexa.com/topsites/countries/BA

¹³ CRA Annual Report 2014. <http://rak.ba/bos/index.php?uid=1272548129>

¹⁴ Hođić, Sanela. "Media Integrity Matters—Increasingly Dependent and Disciplined Media." *SEE Media Observatory*. Nov. 2015. See at: <http://mediaobservatory.net/sites/default/files/State-Media%20Financial%20Relations%20in%20BiH.pdf>

The panelists questioned the editorial independence of the eight news agencies (two public, three private, one owned by the Turkish government, and two owned by religious communities). They concluded that there are no completely independent news agencies due to their financial dependence on state budgets (agencies FENA and SRNA) or relationships with political, religious and business interest groups (the remaining agencies, including private and religious). Discussing the issue of insufficient funding for maintaining quality work, panelists noted that some media outlets often cannot afford to pay for the services of news agencies, in particular the international agencies. "The public service is a big organization, but it does not have a direct subscription to any world agencies," noted Emir Habul, journalist and editor of BHRT.

Private media produce their own news and information programming, but for many, this production is mainly confined to re-publishing and re-packaging news provided by other media or news agencies. However, as noted by a few panelists, some private media also do not give up on news programming despite audience data indicating that hard news hardly ever attracts a bigger audience. Many online media, which have very limited staffing, often publish information taken from another media outlet or news agency without any attribution. The panelists believe that in B&H, the blogging community's contribution to the production and dissemination of socio-political news, information and analyses, is still highly limited, with few bloggers producing original content that is both socially relevant and reliable and/or reaching a critical mass of readers.

Transparency of media ownership in B&H remains limited. Some panelists mentioned the free access to the media market itself creates a problem: a lack of transparency of media, especially for print and even more so for online media. No particular regulations concerning transparency and concentration of media ownership are in place, but transparency is partly ensured through court registration of media businesses. However, full information and systematic insight into ownership structure is not easily discernable, since information is scattered in a multitude of registries, available only by fee and for a large part of media not accessible online. Transparency is especially problematic for online media, which are often not registered as media businesses. "Here you have, when Internet media are in question, media outlets that are registered... and you also have some that are unregistered and do not pay any kind of tax: you don't know who is behind them, or their address,

"Here you have, when Internet media are in question, media outlets that are registered...and you also have some that are unregistered and do not pay any kind of tax: you don't know who is behind them, or their address, or even who works there, but they are in the market," said Amra Kovač, a *Dnevni Avaz* journalist.

or even who works there, but they are in the market," said Amra Kovač, a *Dnevni Avaz* journalist. This situation prevents tracking down the owners, but also contributes to more insecurity in the market concerning, for example, advertising practices and protection of authorship rights.

As different reports indicate, media and media-related businesses are dominantly affiliated with particular business and/or political groups, with some of these relations remaining intricate and/or hidden, in some cases possibly leading to political officials or in other cases leading to other media-related businesses, and thus involving the issues of illegitimate market position and conflict of interest.¹⁵ The Media Clientelism Index, a regional assessment of clientelism and politicization of media in five countries of the Western Balkans, confirmed that B&H, together with Macedonia, suffers the most influence of political elites on media.

Article 15 of the state level Law on the Protection of Rights of National Minorities envisages the establishment of minority media, but so far this has not been the case in B&H. Article 16 of the same law stipulates that public broadcasters (involving PSB and local public media) must provide space for minority programs and languages, while Article 3 of Rule 57/2011 on Public Radio and Television Broadcasters stipulates the requirement for public broadcasters to provide content on different vulnerable groups, including national minorities and refugees and leaving other vulnerable groups unspecified. Implementation of the specified requirements remains questionable without consistent monitoring and with some indication that this content is

¹⁵ Media Integrity Matters, 2014; Report for B&H <http://mediaobservatory.net/radar/media-integrity-matters-%E2%80%93-book-see-media-observatory> and The Media Clientelism Index. <http://analiziraj.ba/2015/12/15/u-sarajevu-predstavljeni-rezultati-mjerenja-indeksa-klijentelizma-u-medijima-u-jugoistocnoj-evropi/>

insufficiently produced. The same goes for reporting on the major constituent ethnic groups, who are believed to be neglected in media based in areas where these groups are in fact minorities.

Media reports about members of the Roma minority group tend to be sensationalist and biased. The Press Council reacted several times in the first quarter of 2015 upon a series of articles in a number of online media about a young girl (allegedly belonging to the Roma community) left to live alone in Sarajevo after her parents died. Even though the overall tone of most of the articles was sympathetic towards the girl, web portals did not take into consideration the fact that they were violating her rights by publishing her photo and revealing her identity. Similarly, reporting about sexual minorities is still unsatisfactory, as only some civil society media show considerable engagement and sensitivity towards LGBT groups, while the majority of mainstream media outlets tend to either “copy/paste” reports from other outlets and/or news agencies or promote stereotypes and use hate speech towards the LGBT community.

Public broadcasters (PBS) and media outlets with national reach offer information about international, national, regional and local events. However, panelists noted that PBS do not have correspondents in all regions of the country, which is why some communities might be neglected (the most mentioned are the areas in Herzeg-Bosnia Canton, West Herzegovina Canton and Posavina Canton). Local media provide information about local communities, but the quality of reporting and critical approach are rather questionable, the panelists indicated.

SEE Media Observatory noted that important information and viewpoints are missing in media content, which is the result of a lack of information sources and various types of political influence exerted on editorial policies, along with scarce funds in the media for production of content important to the local public.¹⁶ “With such a big number of local media, there is no shortage of local information; it’s only questionable who is the source of information, the accuracy of the information, the political siding of the information, and what goal is meant to be achieved with the information,” said Reuf Herić, director of Novi Radio Bihać. In some communities, local websites and blogs do offer a more critical perspective on issues, but their readership is quite limited and they are not very influential.

¹⁶ “Flash Report 6: B&H.” SEE Media Observatory. Jan. 2015. <http://mediaobservatory.net/radar/flash-report-6-bosnia-and-herzegovina>

OBJECTIVE 4: BUSINESS MANAGEMENT

Bosnia Objective Score: 1.39

The score for business operations of media continues to be the lowest among the five objectives, with a worrying trend of further decline (the score dropped by 0.19, to 1.39). Several major problems in the business environment involve increased clientelism and political control, which distort the market. Audience measurement remained one of two MSI indicators with the lowest score overall, but panelists indicate measurement will soon suffer even further demise.

Some estimates by the advertising agency Fabrika suggest overall revenues in the advertising market for 2015 amounted to \$43.68 million (including outdoor), which is considered to be far less than required for healthy functioning of the media sector. Other factors, mostly corruption of advertising practices based on political affiliations of major advertisers and/or conflict of interest and financial corruption, but also lack of quality audience research and ethnic fragmentation of the market, contribute to limitations, uncertainty and overall structural corruption of the sector. Besides advertising, considerable amounts are provided through financial influxes from the state on different levels, which are considered to be primarily used as an instrument for government influence.

Continued maintenance of the large number of media on the market indicates that many depend on shady clientelistic relations, instead of being self-sustaining enterprises in a true sense. Only a minority of media (primarily big

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.

international broadcasters, big local broadcasters and some online media outlets) are considered sustainable, while the majority are either barely surviving or are profiting from close affiliations with major business and/or political powers. One panelist indicated that huge financial losses and irregularities with payments of taxes and contributions of many, in particular local, media are still not made public, due to the unwillingness of local officials to start bankruptcy proceedings: "It's politically unwise to leave 12 journalists in the street... God knows when the last contributions were paid... We have a situation in which court execution orders have arrived in private radio stations, in Bijeljina, in Herzegovina, and so on, where for instance the court execution value is triple the value of their capital in the market, equipment, microphones..." said Herić.

While structural issues are primarily hindering business development, panelists additionally mention a lack of expertise in business management, in some cases resulting from overall reliance on donor support and unfamiliarity with market logic. Such dependence is, however, in some cases necessary for media engaged in critical and investigative journalism (such as Center for Investigative Journalism and Žurnal), which would otherwise hardly survive on the market. Public service broadcasters are considered vastly irrational organizations that devour funds that should be invested more in technical and program improvements.

There are only a few major domestic advertisers, most importantly two telecommunication companies, whose advertising practices are believed to be guided by the interests of the governing political parties they are affiliated with. A recent case of corruption charges against the managers of HT Mostar company and the director of SV-RSA agency illustrates the way money is funneled mostly from public companies into private accounts.¹⁷ When it comes to government funding for media, data collected by Association CRMA in 2015 showed that around \$16.36 million is provided by the government on different administrative levels, in the form of direct funding from government budgets, subsidies or different contracts with media (for covering certain events, advertising, etc.). The current models of government financing lack credible criteria, transparency, independent decision-making and overall guarantees of editorial independence, and thus are believed to be primarily a means of control over media. Major international brands continue to advertise in the B&H market, but there is also a trend of increasing migration to Google ads, non-journalistic platforms, media from neighboring countries and major global media.

¹⁷ See report by magazine Žurnal, available here: <http://zurnal.ba/novost/18397/marketinske-prevare-otkrivamo-sumnjive-ugovore-koji-nisu-obuhvaceni-akcijom-gibraltar>

Zaimović raised concerns about inconsistencies in current audience data where there are programs "...where you have a rather stable audience, for example you have an average rating of 2, but today you have 2, tomorrow 12, the day after tomorrow 1, then 14...and it's impossible for that to happen."

In sum, with only a few major sources of revenue for media on the market and with lack of transparency of funding, it is generally believed that funding is used heavily as an instrument to advance particular political and business interests of media owners and affiliated centers of power.

Panelists disagreed on whether the current limit of advertising time on public television broadcasters, to six minutes per hour, provides enough protection for commercial media. While there are some suggesting PSBs are possibly dumping advertising prices, making it impossible for commercial rival media to compete on a level playing field, Zaimović indicated that commercial media are in fact often lowering the prices of advertising further, in a fierce fight for advertisers and for their own survival. Demands for further commercialization are keeping the quality of news content mostly low and dependent on not only resources but also on limited possibilities to defy dominant business/political interests in circumstances where alternative sources of revenues are scarce. The non-profit media sector remains underdeveloped, with only four registered radio stations of limited reach and mostly humanitarian or religious character.¹⁸

The grip of government over the media sector continues through both affiliations of media managers and financial relations with media outlets. The government provides continuous funding for media, primarily through direct financing of local public broadcasters (by municipalities and cantons), funding of two public news agencies by the entity governments (agencies SRNA and FENA) and different contracts with media for coverage of certain topics or events. Subsidies for media that had been previously provided in Republika Srpska were ceased in 2013, most

¹⁸ Religious radio Marija; radio of humanitarian and activist associations: Radio Open Network (Otvorena mreža); Radio Our Children (Naša djeca); and Native-land-Radio Breške, founded by an association that promotes culture and folklore in the area of Breške, Tuzla.

likely due to budgetary constraints. Other possible modes of funding involve advertising contracts with different levels of government, but they were not frequent or substantial in 2015. More importantly, the leading political parties are believed to be in control of the advertising practices of public companies, which are major advertisers in the country.

Some international agencies, such as GfK and Ipsos, provide audience research, but as Zaimović indicated, the lack of buyers of these data will likely move research providers out of the market. The situation is the worst with print media, which have never shown interest in engaging in a measurement system. In the radio sector, only a minority of radio stations can afford audience data, while online media primarily use Alexa and Google analytics. In addition, radio audience data have limited quality; similarly, only some online media use Gemius Audience research data, which additionally provide information on audience demographics. In the television sector, methodology is the most developed, relying on people meters and representative sampling, but doubts about the reliability of the data and credibility of the provider have been expressed for years. Strategic planning and programming based on results of market research are confined to a minority of media that can afford the best measurements and depend on the sometimes inadequate competence of media managers. Finally, the above-mentioned irregularities in the market do not go in favor of relying on market-based business planning. Lejla Turčilo, a professor on the Faculty of Political Sciences at the University of Sarajevo, added that audience research results do not call for better news quality, but quite the opposite, they call for further commercialization of content.

The score for reliability of audience data is one of the two lowest indicators on the market, as in the previous year. The major changes in previous years and controversies about audience research still resonate in the market. Individual media have been buying audience data since 2013 when the Association of the Media Industry lost its role as audience research contractors, performed since 2006. As noted in the previous MSI report, the previous provider Mareco Index Bosnia left the business in 2014. Some of the panelists stressed that trust in the system was shaken due to controversies about ownership over the new provider of television audience data, Audience Measurement (AM).

Another controversy raised in March 2015 related to accusations that TV1 network did not broadcast advertising it had accepted payment for, and that AM issued false data about the broadcasting of this advertising. As Puhalo

pointed out, it was never made clear to the public what had actually happened and who should be held accountable.¹⁹

Zaimović raised concerns about inconsistencies in current audience data where there are programs "...where you have a rather stable audience, for example you have an average rating of 2, but today you have 2, tomorrow 12, the day after tomorrow 1, then 14... and it's impossible for that to happen." Zaimović also reports that seven or eight media and agencies, including Fabrika, had sued AM for alleged irregularities in determining the prices of their services: "The price for my firm is higher than, for example, the price for some media outlets, while international practice is that 80 percent of the price of research is paid by televisions and 20 percent by agencies, because television stations use that for sales and for programming." Several panelists indicated that the quality and reliability of the provided audience data, as well as the setting of prices for audience research, will remain suspect as long as there are no common solutions on the level of the entire industry, which would balance the various interests and guarantee the reliability and quality of audience data.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Bosnia Objective Score: 2.15

Compared with last year, Objective 5 scores increased slightly. The score for indicator 1 (trade associations represent the interests of media owners and managers) increased somewhat, indicating a somewhat improved sense of solidarity in the course of a few recent cases of pressure on journalists. The score for Indicator 8 (ICT infrastructure) increased substantially, indicating continuous development in some respects, but also held back by concerns about the delayed digital switchover. Indicator 5 (training programs) dropped the most of any indicator in this objective, pointing to a scarcity of offered training programs, especially due to a lack of donor support.

In B&H, there are four associations of electronic media which, according to Herić (who also services as president of the Steering Board of the Association of Electronic Media (PEM) of B&H), do not agree on most solutions for the common benefit, some of them being payment of

¹⁹ Management of TV1 network and Audience Measurement denied the accusations, qualifying them merely as an attempt of competing businesses to discredit their work. More at: <http://radiosarajevo.ba/novost/183605/pogledajte-snimku-da-li-je-ovo-dokaz-velike-televizijske-prevare-u-bih-video>

authors' rights and intellectual property rights, commercial advertising prices, etc. However, Herić thinks that the work of trade associations slightly contributes to improvements in the sector, which is the reason why the average score slightly increased in comparison to last year. Due to the divided and unstable market, many electronic media are facing financial problems. Herić noted that some members of PEM cannot even afford to pay the annual membership fee of BAM 150 (\$85).

The Association of the Media Industry (UMI), gathering several broadcasters and advertising agencies in B&H, has lost the role of contractor of audience research, but is still functioning as an association—although some previous members are no longer involved. In late 2014, the reputation of the association was further questioned as some members of UMI were under investigation for alleged corruption, but the charges were confirmed only against one director of an advertising agency.

Out of six journalist associations that were registered in post-war B&H, there are four that are still to some extent active: Association of Croat Journalists of B&H, Union of Journalists of B&H, Union of Journalists of RS, and BH Journalists Association. Fragmentation in collective organizing is reflective of the political and ethnic divisions in the country, with rare cases of solidarity. The BH Journalists Association, an association of 750 journalists from across the country (including freelance journalists, journalism students, photographers, etc.), is assessed by the panelists as the most agile. The annual membership fee is BAM 25 (\$14). The Association provides various trainings and legal

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.

aid programs that are not limited only to members. The revenues of BH Journalists depend primarily on international donor support, without alternative modes of sustainability in place.

At the entity level, there is the Trade Union of Media and Graphic Workers of RS and the Union of Publishing, Graphic and Media Workers of FB&H, but a trade union of journalists at the state level does not exist. Public services have four: Independent Trade Union of RTRS, while the Independent Trade Union of Public Service Employees split in two—one for FB&H and one for BHRT—at the very end of 2014. Collective organizing at BHRT additionally involves two trade unions: Independent Trade Union of Employees of BHRT and Independent Trade Union Organization of BHRT. A Media Initiatives report expressed doubt over the efficiency, credibility and independence from management structures of trade unions in general.²⁰ Many professionals think that trade unions should play a much stronger role in protecting the rights of journalists—a sentiment confirmed by 87 percent of media workers who participated in a 2012 study on media freedoms in Council of Europe member states.²¹ While media outlets with a high number of employees should have trade union organizations, according to unofficial data overall more than 60 percent of media in B&H do not have them.²²

As for NGO support to free speech and independent media, the panelists delivered a similar assessment to last year. With some exceptions (such as Transparency International or Helsinki Citizens' Assembly), NGOs in general do not work with the media sector to support freedom of speech and media independence, and do not efficiently partner with media outlets in media advocacy. The Helsinki Committee for Human Rights in B&H, one of the rare organizations that consistently supported media freedom, shut down in late 2014.

There are as many as six journalism departments at public faculties in B&H (although some combine journalism and communications studies) and two private faculties. One of the panelists, a faculty professor, said that university journalism education in B&H is for the most part still outdated and lacks connection with practice. "The public universities are still rather theoretical and unrelated to

²⁰ Udovičić, Radenko. "Working Conditions for Journalists in Bosnia and Herzegovina: Journalists in a Gap between Devastated Media and Legal Security." Media Initiatives, Feb. 2015. www.mediaonline.ba/en/pdf.asp?ID=3412&n=JOURNALISTS%20IN%20A%20GAP%20BETWEEN%20DEVASTATED%20MEDIA%20AND%20LEGAL%20INSECURITY

²¹ Izvještaj u sjeni za BiH. B&H Journalists. 2012. www.bhnovinari.ba/images/stories/pdf/istrazivanja/izvjestaj_u_sjeni.pdf

²² Šarčević, Mariana. "Sigurna radna mjesta su preduslov medijske slobode." B&H Journalists' Bulletin E-Novinar. Dec. 3, 2015. www.bhnovinari.ba/index.php?option=com_content&view=article&id=445&Itemid=257&lang=bs

“The public universities are still rather theoretical and unrelated to practice; they are closed to such an extent that even some internal documents prescribe that only people with the title of assistant professor or higher can go into the classroom,” said Turčilo.

practice; they are closed to such an extent that even some internal documents prescribe that only people with the title of assistant professor or higher can go into the classroom,” said Turčilo. She added that private faculties, although they claim to promote more practical skills, seem to differ little from public programs in this sense.

B&H gets around 400 new journalists and communication specialists every year. Sarajevo-based Media Plan Institute estimates that the actual needs for such positions are not even half that number.

Short-term training and in-service training programs for journalists still depend on donor support. With waning interest from international organizations to finance such program, there are fewer quality programs. The four-year long “Strengthening Independent Media” program run by Internews B&H, which organized internship programs for journalism students along with Mediacentar Sarajevo, ended in 2015. During 2015, Mediacentar Sarajevo also delivered an online training course on investigative reporting for journalists, a training course on media convergence for senior journalists and editors, and a training program on freedom of expression for civil society organizations. BH Journalists Association and Press Council of B&H offered trainings for journalists and students on professional ethics in 2015. Otherwise, there were no significant education programs aimed at upgrading skills and acquiring new knowledge for B&H journalists in 2015.

There are no restrictions on importing and/or purchasing materials that media and journalists need to produce their work, such as newsprint, software, video equipment, or transmission equipment, and no reported cases of monopolistic or unfair restrictions in printing and distribution. Printing houses are mostly privately owned and generally provide services regardless of media editorial policies and based on the best financial rationale, which in some cases limits distribution—especially of newspapers in

circumstances where political fragmentation in the country translates into fragmented interests of media users.

The panelists did not report pressure on media at the national and/or local level by government, political parties, or businesses through control over distribution. However, B&H has no strategy to develop the telecommunication sector, which jeopardizes development of the mobile phone market and Internet. Several cable operators have urged the Council of Competition of B&H to take a decision on the still-pending intention of one of the most powerful broadcast distributors, Telemach, to buy cable operators, which could lead to a Telemach monopoly. A decision on reduced prices of mobile roaming services in B&H, Montenegro, Serbia and Macedonia came into effect in June 2015 and should further liberalize mobile communications. Also, in December 2015 CRA proposed the abolition of national roaming services in the country.

A significant increase in the average score for indicator 8 reflects further improvements concerning ICT infrastructure. Currently, there are six mobile carriers and numerous Internet providers. Panelists noted that citizens are increasingly using the Internet on mobile phones and computers to access media, and that there is an increasing variety of mobile and computer brands on the market accessible to citizens. Internet penetration has increased to 58 percent.²³ The number of mobile service consumers in Bosnia and Herzegovina totaled 3,528,695 in the third quarter of 2015, up by 3.6 percent from the second quarter. The mobile penetration rate increased to 91.85 percent at the end of September, up from 88.68 percent in the previous quarter.²⁴ Rokša Zubčević, however, indicated that due to stalemates in the digital switchover process, the increase of the score for ICT infrastructure is misleading. After the strategy for digital switchover was adopted in 2009, a series of roadblocks, involving disputed procurement of equipment and denial of equipment installation, as well as transfer of ownership over equipment from the system to individual broadcasters, all believed to be politically motivated, led to B&H missing the June 17 deadline for completed switchover. Announcements that the test digital signal would be broadcast by the end of the year (with the switchover to be finalized in 2016) proved to be overly optimistic, as well. However, solving the issue of which body will manage the digital system and the actual finalization of switchover still depend on political will, which has so far proved unreliable.

²³ CRA Annual Report 2014. www.rak.ba/bos/index.php?uid=1272548129

²⁴ “Bosnia’s Q3 mobile phone subscribers up 3.6% q/q.” SeeNews. Dec. 2015. wire.seeNews.com/news/bosnias-q3-mobile-phone-subscribers-up-3-6-q-q-505798

List of Panel Participants

Senad Zaimović, general manager, Fabrika advertising agency, Sarajevo

Asja Rokša-Zubčević, director, Division for Broadcast Services and International Cooperation in Broadcasting, Communications Regulatory Agency, Sarajevo

Merima Hrnjica, journalist, Center for Investigative Reporting, Sarajevo

Reuf Herić, director, Novi Radio; president, Steering Board of the Association of Private Electronic Media, Bihać

Emir Habul, journalist and editor, BHRT, Sarajevo

Amra Kovač, journalist, Dnevni avaz, Sarajevo

Lejla Turčilo, professor, Faculty of Political Sciences, University of Sarajevo, Sarajevo

Gordana Šarović, director, Technical Information Center, RTRS Istočno Sarajevo bureau, Istočno Sarajevo

Srđan Puhalo, blogger, Prime Communications and Frontal.ba, Banja Luka

Andrijana Copf, journalist, Dnevni list, Mostar

Mehmed Halilović, independent media expert, Sarajevo

Jasmin Hadžiahmetović, online editor, TV N1, Sarajevo

Boro Kontić, director, Mediacentar Sarajevo, Sarajevo

The following panelist submitted a questionnaire but was unable to attend the panel discussion:

Borka Rudić, secretary general, Association of BH journalists, Sarajevo

Authors

Sanela Hodžić, research coordinator, Mediacentar Sarajevo, Sarajevo

Lidija Pisker, independent researcher, Sarajevo

Moderator

Sanela Hodžić, research coordinator, Mediacentar Sarajevo, Sarajevo

Proofreading & Translation

Kanita Halilović

The Bosnia and Herzegovina study was coordinated by, and conducted in partnership with, Mediacentar Sarajevo. The panel discussion was convened on December 3, 2015.

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 Mediacentar Sarajevo or of other associated institutions.