

**MEDIA**

**SUSTAINABILITY**

**INDEX**

**2005**



**IREX**

THE MEDIA SUSTAINABILITY INDEX (MSI) PANEL AGREED THAT THE MAIN DYNAMIC IN THE DEVELOPMENT OF THE MEDIA SECTOR IS THE COUNTRY'S EFFORTS TO JOIN EUROPEAN INTEGRATION PROCESSES, AND AS A RESULT THE MAJORITY OF RELEVANT LAWS ARE IN HARMONY WITH EU LEGISLATION.

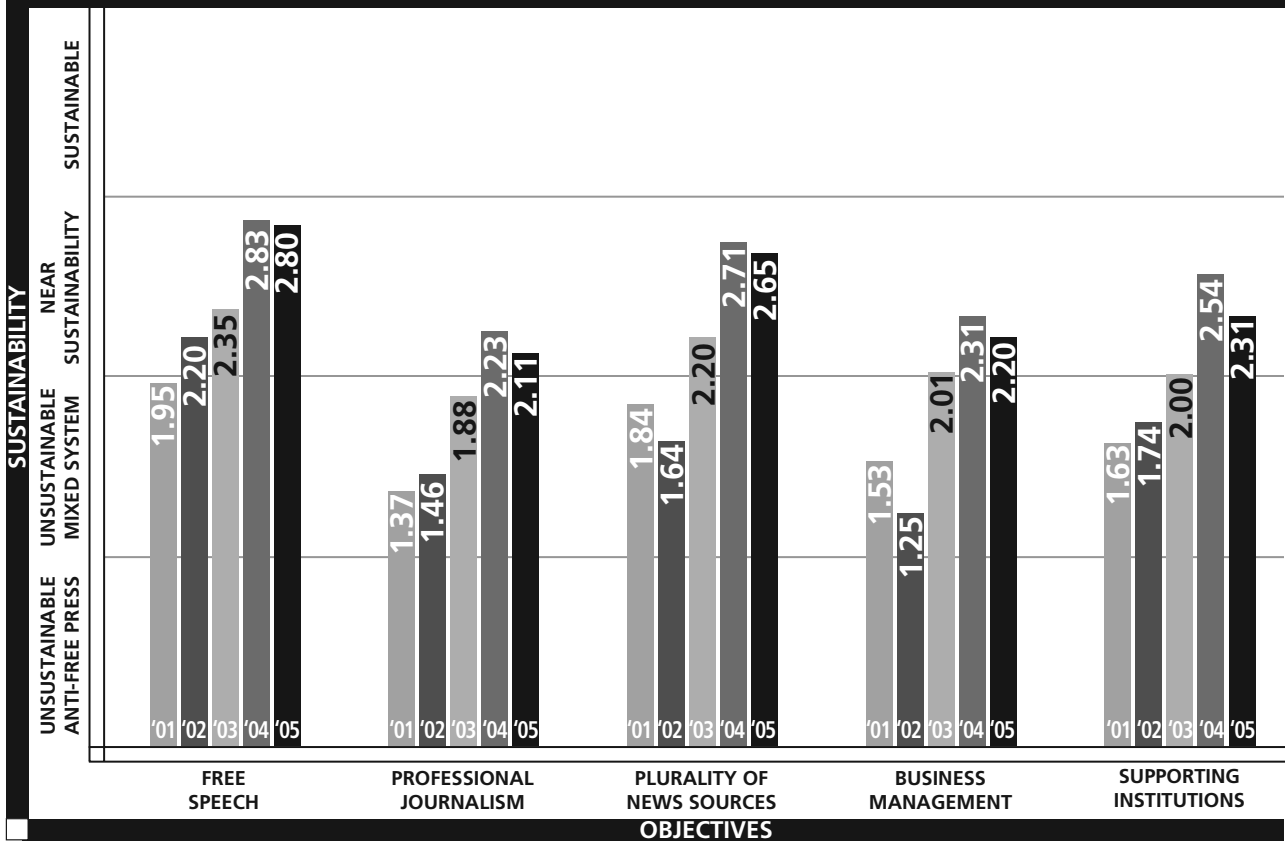


**B**osnia and Herzegovina's recent history is shaped by the decade-old Dayton Peace Agreement, which successfully ended the four-year war but also paved the way for an extremely complex state structure. The media system forms a key part of this structure, and its reform and transition processes are yet to be completed.

Bosnia and Herzegovina consists of two roughly equal entities, with a weak central government. In addition, there is the Brcko District, which is under the formal authority of the state but is greatly influenced by a special foreign supervisor for the city. Implementation as well as interpretation of civilian aspects of the peace agreement falls to the Office of the High Representative (OHR), who is selected by the Steering Board of the Peace Implementation Council made up of 55 countries and international organizations sponsoring the peace process. His extensive powers are affirmed by the United Nations Security Council and include supreme legislative and administrative authority in the country, as well as the mandate to impose laws and decisions and to discharge officials at any administrative level if their activities contravene the letter and spirit of the peace accord. Along with the complex political system, the slow process of postwar reconciliation and a devastated economy influence the situation in the country.

The OHR now tries to use its powers as rarely as possible, insisting that the local governments take responsibility for running the country. However, the High Representative's role is still dominant and it is difficult to imagine the country functioning in the near future without the direct presence of the international community. In October 2005, the European Commission recommended a start to negotiations on signing a Stabilization and Association Agreement with the country, recognizing that Bosnia and Herzegovina had fulfilled 14 requirements to reach that stage. One was passage of a Law on the Public Broadcasting System of Bosnia and Herzegovina, adopted in October despite strong resistance from Bosnian Croat political parties that had demanded three separate public televisions be established in the Croatian, Serbian, and Bosnian languages. The law

## MEDIA SUSTAINABILITY INDEX: BOSNIA



**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.

that ultimately passed, although formally in line with European Union (EU) principles, is to a certain degree a result of compromise between European principles and these parties' demands. The law envisions the existence of a Public Broadcasting System with programming produced in three studios (Sarajevo, Mostar, and Banja Luka) with equal status. This would additionally complicate the operation of the already intricately structured Public Broadcasting System, and media experts generally consider the proposed solution to be too complex, inefficient, and costly.

The Media Sustainability Index (MSI) panel agreed that the main dynamic in the development of the media sector is the country's efforts to join European integration processes, and as a result the majority of relevant laws are in harmony with EU legislation. The reduction of the public broadcasters' role in the market continued in 2005. According to Mareco Index Bosnia data for 2005, the rating of the leading broadcaster, Federal Television, dropped from 23.8 percent in 2004 to 18 percent in 2005. This shift was in favor of commercial outlets, rather than other public-service broadcasters.

The most discouraging factor the media sector in 2005 was the underdeveloped market, characterized by the population's limited purchasing power, fragmentation along ethnic lines, little interest among foreign investors, and very limited donor involvement. Furthermore, the size of the advertising market did not change significantly in relation to 2004, with a large number of outlets continuing to compete for the limited market coupled with a privileged position of media from other countries.

Media outlets remain vulnerable to political pressures. In addition, while a good part of the media are trying to operate in line with professional norms and ethical standards, the MSI panelists noted that a certain number of outlets—mainly newspapers—continue to produce content with the nationalistic themes that in part instigated the war in Bosnia and Herzegovina.

**OBJECTIVE 1: FREE SPEECH**

**Bosnia Objective Score: 2.80 / 4.00**

The legal foundation that ensures free speech is contained in the Constitution, which has as an integral part the European Convention on Human Rights. Bosnian-Herzegovinian legislation generally emerged under direct international influence, and for that reason the free-speech statutes surpass laws in other countries in the region and are comparable

to those with the longest democratic traditions. Especially important in this regard is the defamation law, which considers defamation a civil rather than criminal issue. A pronouncedly progressive Freedom of Access to Information Act is also in effect. However, implementation of these laws encounters various barriers, the most important of them the judiciary's treatment of defamation lawsuits, the MSI panelists said.

Borka Rudić, general secretary of the association BH Novinari, emphasizes that "according to initial analysis done by the Office of Ombudsmen and lawyers who have defended journalists, the implementation of laws indicates that freedom of speech is threatened in Bosnia and Herzegovina. How our courts apply the law shows that case law developed by the Strasbourg (human-rights) court is not being used sufficiently."

Mehmed Halilović, Federal Ombudsman on Media, cited as an example of this problem the 2004 judgment by the Cantonal Court of Tuzla that stated "the burden of proof with regard to the truthfulness of allegations in the case of defamation, as a civil law issue, lies on the defendant, because allegations regarding the plaintiff are presumed to be untrue until proven otherwise."

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

**FREE-SPEECH INDICATORS:**

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

Although it has been four years since the Freedom of Access to Information Act was passed at state level, it is still not broadly applied. Furthermore, there is general ignorance with regard to how the law should be implemented. This does not refer solely to ordinary citizens, but to journalists as well. The MSI discussion showed that journalists also refer to the law in their work, rather than expecting public authorities to provide journalists with information as a matter of course.

***Borka Rudić stresses that “politicians have a very selective attitude to journalists—i.e., to whom they will give information.”***

Access to public information, according to the panelists, is obstructed most of all by the arrogant conduct of authorities.

MSI participants

did not exclude representatives of the international community from this behavior. Borka Rudić, stresses that “politicians have a very selective attitude to journalists—i.e., to whom they will give information.”

Vildana Selimbegović, editor of *Dani* magazine, contended that certain public information, mainly public spending, simply cannot be accessed. “I have tried everything, but there are expenditures from certain coffers that are unavailable to journalists,” the editor said. “I have tried using the Law on Access to Information, and I have 24 rejections. Six months overdue. End of story.”

Legislation differentiates between private and public media, but not in terms of access to information. This, however, does not mean that in practice media with better political connections do not get privileged information. This issue became the subject of public attention in late October, when *Dnevni Avaz* exclusively “disclosed” the name of a suspect in a series of explosions in Sarajevo. When later it turned out that the information received from a “confidential source” was not true, *Avaz* revealed that it had been obtained from a Cantonal Ministry of Interior spokesperson and offered video footage made by security cameras confirming that the named official had come to *Avaz*’s building at the specified time.

On the other hand, authorities are not restricting access to international news and sources either formally and legally, or in practice.

The legislative framework does not differentiate between media companies and other companies entering the market. The Law on value-added tax (VAT), scheduled to go into effect early in 2006,

envisions a single tax rate of 17 percent. This development does not bode well for the profitability of print media and the publishing industry in general. Numerous organizations, such as the Press Council, journalists’ groups, and associations of newspaper publishers, have requested that press and publishing be exempted from taxation, stressing the particular role of media in democratic societies. A press release issued by the Association of Newspaper Publishers of Bosnia and Herzegovina, newly formed in 2005, says: “We, publishers of print media in B&H, strongly feel that the imposition of value-added tax, as well as customs duties on raw materials needed for the publishing industry, actually constitutes taxation of information, opinion, and knowledge.” The state parliament rejected requests for exemptions from VAT, although discussions continued.

The licensing of broadcasters is essentially fair, competitive, and apolitical, most panelists agreed. Powers in this area were bestowed upon an independent state agency, the Communications Regulatory Agency (CRA), which is in charge of the licenses and controls the broadcasting spectrum. The CRA’s Dunja Mijatović underlined that the agency has won all lawsuits challenging its decisions from 1998 to this day.

The term public media in Bosnia and Herzegovina encompasses public broadcasters at state level established under the Law on the Public Broadcasting System of B&H, as well as municipal and cantonal broadcasters founded by municipal and cantonal assemblies. There is no doubt that local media are more susceptible to direct political influence than state-level public broadcasters. But the latter are also placed under pressure, although the methods used are somewhat more sophisticated. Amir Zukić, Bosnia and Herzegovina Television (BHT) news program editor, assesses the state’s influence on public media from his own experience: “The influence doesn’t take place through any structures, but it will happen that a politician will say: ‘Don’t watch a certain program and don’t pay the television license fee.’ Or, he will call one of my bosses and try to influence me through him.” An article in the weekly *DANI* described in March how top Bosnian Croat politicians called for conditioning payment of the license fee on their insistence that Federal TV include an ethnically defined Bosnian Croat channel in the Croat language.

There were several attacks on journalists during 2005. The gravest was an assault on *Dnevni List* journalist Nermin Bise, who was beaten by police officers while attempting to cover football fans rioting in the streets

of Mostar. The panelists also expressed concern about failure to bring closure to court proceedings against suspects in other attacks on journalists over the past years. The insecurity of journalists is reinforced by undemocratic conduct on the part of some politicians. For instance, Milan Radmilović, Mayor of Gacko, declared RTRS journalist Biljana Bokić a *persona non grata* in 2005 because he was unhappy with her coverage of scandals in the town. However, there are no legal restrictions on who may enter journalism, or work in the media.

**OBJECTIVE 2: PROFESSIONAL JOURNALISM**

**Bosnia Objective Score: 2.11 / 4.00**

Comparing the situation in 2005 with the war or postwar periods, the MSI panelists agreed that considerable progress had been made in the implementation of professional standards of journalism. However, they said, there remains room for improvement.

Research done by the Prizma agency in May 2005 showed that as many as 75 percent of the 250 respondents felt that journalists' work is influenced by certain political parties and politicians. Media monitoring carried out by the Press Council in June 2005 showed that the most commonly violated articles of the journalistic code refer to privacy, followed by those on coverage of persons suspected of committing criminal acts and on the way that comments, suppositions, and facts are expressed. This indicates that journalists and editors still encounter considerable difficulty in respecting the truth and the public's right to know, in working in the spirit of fairness, truthfulness, and decency and in reporting and expressing opinions.

There is a significant difference between print and electronic media with regard to respect for ethical norms. Broadcasting is regulated by the *Broadcast Code of Practice*, which empowers the Communications Regulatory Agency, in cases of violation of the Code's rules, to take a number of restrictive measures. Among these are demanding apologies, issuing warnings, imposing fines, suspending licenses, entering premises, seizing equipment, suspending activities, and withdrawing licenses. The Press Council, working with the print media, operates on the principle of media self-regulation and is not authorized to impose sanctions.

Nihada Hasić, editor of Banja Luka-based *Nezavisne Novine*, said that "in practice, there is a lot of irresponsibility and many people abuse space in media for destroying others' careers and private lives ...,"

using freedom of speech as a pretext." This referred not only to journalists, but also to others given space by journalists to express their opinions. Examples of lack of respect for ethical principles are reported in both "pro-state" and "independent" media.

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The panelists felt that self-censorship continues to be present in journalists' and editors' work, primarily stemming from fear of being fired. This fear, according to the panelists, is becoming more pronounced with the worsening of the country's general economic situation. Furthermore, this kind of conduct on the part of editors is affected by pressure from the advertising industry. With the advertising market too small for the number of outlets, media have developed a particular sensitivity to issues that may turn away existing or potential advertisers, panelists said, and this is why coverage of certain issues is unthinkable at some outlets.

**Journalism meets professional standards of quality.**

**PROFESSIONAL JOURNALISM INDICATORS:**

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

Nihada Hasić expressed concern about the financial insecurity to which journalists are subjected. She said their “wages are usually irregular and low, which may affect their objectivity and adherence to professional standards.” A particularly pronounced problem is irregular pay and failure to pay contributions for social and medical insurance by many public and private media. For example, employees of the state (BHRT) and federal (RTFBIH) broadcasters announced they would strike in 2006 if their managements did not ensure they were paid three overdue salaries and all contributions.

**“Wages are usually irregular and low, which may affect their objectivity and adherence to professional standards,” said Nihada Hasić.**

Some panelists expressed concern that programming is too commercial and that the information dimension of media will be overshadowed completely in

the future. Most of the media content consists of daily political events and entertainment, while professional analysis of specialized issues is less frequent. Investigative journalism is also rarely practiced.

There is a significant difference between print media and broadcasters in terms of equipment used for collecting and producing news. The panelists agreed that the level of technical capacities of print media is satisfactory. However, although there are a few large media companies that have modern equipment, a large number of local electronic media use outdated equipment for broadcasting. Dunja Mijatović of the Communications Regulatory Agency emphasized that inspection of all television and radio stations established that many did not have proper technology, mainly due to their difficult economic situations.

### OBJECTIVE 3: PLURALITY OF NEWS SOURCES

**Bosnia Objective Score: 2.65 / 4.00**

There are approximately 190 electronic media outlets in the country. Most are local radio and television stations, and only state-level public broadcasters and a handful of commercial networks have coverage of the majority of the country, with public broadcasters reaching approximately 80 percent. There is no reason for the existence of such a large number of outlets in the poor and fragmented Bosnian-Herzegovinian market, so it is difficult to understand the real reasons for this situation. Clearly, it does not reflect a vital market with

development potential and an ability to offer diverse voices and opinions, the MSI panelists said. Therefore, it is only a matter of time before significant consolidation takes place in the broadcasting sector.

There are also seven daily newspapers and at least five significant weekly or biweekly magazines. A significant change between 2004 and 2005 is that *Ljiljan*, once the most important weekly, stopped publishing after changing its format and losing its market position.

The circulation of all daily newspapers is estimated at about 80,000 sold copies per day for the population of around 3.8 million people. There are several reasons why newspapers sell so poorly. First of all, citizens have low purchasing power. Many simply cannot afford to buy a daily at a price of €0.50 or a weekly or biweekly for €1.5. Furthermore, strong competition from neighboring Serbia and Croatia lowers sales of domestic newspapers. There are 13 daily newspapers from those countries, as well as 61 foreign weekly or monthly newspapers. Another limiting factor is the ethnically fragmented market. Most papers primarily cover the entity where they are based. This division is a result of the war, but it also reflects the structure of the country’s territorial and institutional arrangements. The exception is Banja Luka’s *Nezavisne Novine*, which

### Multiple news sources provide citizens with reliable and objective news.

#### PLURALITY OF NEWS SOURCES INDICATORS:

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



targets readership from the whole territory.

Cable operators have a developed infrastructure in all large towns and cities, and their offer of regional television stations has brought unexpected competition for the Bosnian-Herzegovinian channel. In 2005, a dispute arose between cable operators and Mreža Plus, a regional television network, concerning broadcasting of the Croatian station Nova TV program. The cable operators were rebroadcasting Nova TV's popular television series (such as "Desperate Housewives") and thus reducing advertising revenues for local television stations that had brought rights for these programs for Bosnia-Herzegovina. The dispute was resolved under Communications Regulatory Agency auspices with approval given only for broadcasting the station's domestically produced programming. In the meantime, as many as 18 cable operators were fined for violating the license for cable distribution of radio and television programming.

Internet access is still limited. According to the most recent data, Internet providers gave services to some 55,000 private users, around 32,000 businesses, and approximately 3,000 primary and secondary schools and universities. The official data on Internet penetration per 100 citizens is between 1.5 and 2 percent.

Public broadcasters at the state level have an obligation to reserve 40 percent of their time for domestically produced programs of all formats, not counting news and sport. Public broadcasters also have other obligations aimed at ensuring coverage of areas that commercial broadcasters generally do not consider profitable. However, bearing in mind that collection of the license fee is still low, it is understandable that these outlets are fighting to win advertiser favor by producing more commercial programs.

The most important news agencies are the state-subsidized FENA and SRNA and the independent ONASA. Although the former two have a better market position because they have secure state funding, these agencies deal with their clients selectively. One of the panelists, Adnan Osmanagić, director of Sarajevo's Radio Stari Grad, said, "Some pay the full price, some compensate, some pay 50 percent, and some never pay."

Since the media market is still underdeveloped and overpopulated with outlets, there is no particular concentration of ownership. In fact, foreign capital, with which the term "concentration" is usually associated, although deeply involved in the markets of neighboring countries, has not entered the Bosnian-Herzegovinian print media market. It seems that the big western corporations that bought top Croatian and Serbian

media have realized that they can accomplish their goals in Bosnia-Herzegovina by distributing insignificantly changed Zagreb and Belgrade editions. For example, Belgrade's *Blic* is in second place in B&H with a readership rating of 13 percent, while Zagreb's *Vecernji List* is in the respectable fifth place with 9 percent, according to 2005 data from Mareco Index Bosnia.

***Regarding news agency subscriptions, Adnan Osmanagić, director of Sarajevo's Radio Stari Grad, said, "Some pay the full price, some compensate, some pay 50 percent, and some never pay."***

In terms of transparency of ownership, the MSI panel noted that there are sufficient provisions, as well as public registers, and that it is theoretically possible to access information on ownership structures. However, in practice, it is very difficult to do this because there is no central database, and also because the largely hard-copy archiving system is outdated.

Furthermore, in light of the inefficiency of state bodies in establishing the real relationships among various business players, it is very possible that the nature of these relationships significantly differs from that which has been declared. Therefore, because it is extremely difficult to access more complex information, although there are no visible media monopolies in B&H, the possibility cannot be ruled out entirely.

Some minority groups have their own papers and radio programs. Such newspapers are mostly limited to the minorities they target. Although coverage of minority-related issues is not met with resistance in the general media, what is evident is that even minority groups are not interested in this type of programming. MSI panelists suggested that the state should take a more active role in encouraging and funding these kinds of projects.

#### **OBJECTIVE 4: BUSINESS MANAGEMENT**

**Bosnia Objective Score: 2.20 / 4.00**

Most media outlets are not efficient and profitable businesses. The biggest problems for print media are high distribution costs and printing difficulties. Vildana Selimbegović said her magazine was forced to start printing in neighboring Croatia due to constant holdups at the printing company. Dario Novalić,

director of the Sarajevo biweekly *Start*, mentioned a similar experience, saying that the "printing press always 'breaks down' when an independent newspaper is supposed to be printed."

An exception is the Sarajevo media company *Avaz*, which modernized its printing processes, built a modern business building during 2004, and planned to launch a television station by the end of 2005.

Media outlet revenues come from the usual sources: sales, subscription, and advertising. In addition, some outlets continue to receive donor support. The chief problem in media development is the insufficiently developed advertising market, particularly taking into account the large number of outlets operating in the B&H media market.

Data collected by Mareco Index Bosnia, a media and market-research company, put the gross value of the television advertising market for 2004 at around €97 million. However, the panelists said that it would be safe to assume that the discounts that media gave to clients exceed 50 percent. For example, Jasmin Duraković, director of Federal Television, said that advertising revenues of his outlet for 2004 were about €7.5 million, while Mareco Index Bosnia estimated Federal Television's share above 20 percent of the total market, or more than €19.5 million.

The gross value of the daily newspaper ad market was an estimated €2.35 million, and for magazines €344,000. Mareco Index Bosnia estimated the total advertising revenues for the first six months of 2005 at €49.2 million (96.43 million KM). Judging by these figures, it can be concluded that there were no major changes for 2005 compared with 2004. Still, it must also be underlined that all these figures are very rough estimates and that there are still no precise figures on the size of the Bosnia-Herzegovina advertising market. It is clear that advertising revenues of magazines are especially low. Panelists point out that they make up only 8 percent of magazines' total revenues.

Cooperation between advertising agencies and outlets is still at a low level and is aggravated by the nonexistence of precise information on the size of the ad market. A census of the population has not been carried out in Bosnia and Herzegovina since 1991, as a result of which basic reliable data are lacking for any secondary research. This situation makes it very difficult for potential advertisers to choose the right outlet and creates room for various kinds of manipulation with circulations and ratings.

Further complicating the industry dynamics is the presence of media from neighboring countries because they see the B&H market as an additional source of revenues and thus have more freedom in establishing advertising rates. The situation is exacerbated by a large number of media operating in a disorderly market, driving down advertising rates. Some of the panelists pointed out that the private television OBN has brought down its advertising rates so much that they are lower than advertising rates on radio in the Republic of Croatia.

Statistics show 15 out of 39 television stations and 63 of 143 radio stations are still owned by local and regional governments. The greatest influence is exerted on media editorial policies at the local and cantonal level because these outlets are directly funded from cantonal and municipal budgets. However, state authorities also find nontransparent mechanisms to support privately owned media, the panelists said.

Media outlets are mainly interested in viewing ratings in order to use them to increase advertising revenues. Dino Đipa, Director of the Sarajevo-based research agency Prizma, says that an increasing number of media outlets feel a need to use market research in shaping their business policy but lack of money is a hurdle to moving forward with this. There are several research agencies, such as Mareco Index Bosnia, Prism Research, and Puls and Partner, that research viewing, listening, and reading rates.

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

**BUSINESS MANAGEMENT INDICATORS:**

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

Some panelists expressed doubt about the validity of television rating research done so far. However, it is expected that the situation will improve in the coming period because a Joint Industry Committee for the broadcasting industry started operating at the beginning of 2005. It is composed of 13 members (seven advertising agencies, three public broadcasters, and three private broadcasters), and it is anticipated that this new independent agency, which has succeeded in bringing together broadcasters and marketing agencies, will set generally accepted standards for measuring the television and radio markets.

**OBJECTIVE 5: SUPPORTING INSTITUTIONS**

**Bosnia Objective Score: 2.31 / 4.00**

The Association of Electronic Media (AEM) has been operating in Bosnia and Herzegovina for several years, promoting the interests of its member broadcasters. Also, the Association of Newspaper and Magazine Publishers appeared in October 2005. The country's journalists are represented by several associations, and this situation reflects the ethnic division, with at least a third of the journalists being members of ethnically defined professional groupings.

The multiple trade associations are typical of countries in transition from communist systems, where the professional associations were arms of the party and journalists who were dissatisfied with this situation founded parallel organizations. With the establishment of BH Novinari (B&H Journalists) in December 2004 from the merger of three associations—the Independent Union of Professional Journalists from Sarajevo, the Association of Journalists Apel in Mostar, and the Independent Association of RS Journalists in Banja Luka—the situation improved somewhat. Membership, however, is low, and activities remain rather fragmented.

There are not enough nongovernmental organizations (NGOs) working actively to protect and promote free speech, the MSI panelists said. This is particularly pronounced in small communities. The most important role in this area belongs to the Helsinki Committee for Human Rights, but the work of some other organizations is also prominent, such as that of the Media Plan Institute, Mediacentar Sarajevo, the Centre for Free Access to Information, and Open Society Fund B&H.

In Bosnia and Herzegovina, journalism is studied at five faculties—one in Sarajevo, one in Tuzla, one in Mostar, and two in Banja Luka. The large numbers of journalists

produced by these faculties are not necessarily required by the B&H market. The MSI panelists expressed dissatisfaction with the quality of education received at these

faculties and stressed that newsrooms are getting staff who are unable to work independently. But there was progress in this area during 2005. For instance, the NGO Internews organized training for journalism students at the Sarajevo Faculty of Political Science, and students are increasingly being sent to media outlets during their education to do practical work there.

Panelists expressed a high opinion of short-term journalist training programs. However, the Media Plan Institute year-long specialized journalism school, which trained students from all over the region, did not open to new students during 2005 due to lack of funding. Mediacentar organizes training for media managers, as well as short training programs on various aspects of investigative journalism. Of particular significance is Mediacentar's regional project, the Online Journalism

***There are not enough nongovernmental organizations (NGOs) working actively to protect and promote free speech, the MSI panelists said. This is particularly pronounced in small communities.***

**Supporting institutions function in the professional interests of independent media.**

**SUPPORTING INSTITUTIONS INDICATORS:**

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

Resource Center at [www.netnovinar.org](http://www.netnovinar.org), launched in cooperation with Belgrade's Media Centre and the Investigative Journalism Centre from Zagreb.

Although most transmitters for RTV program broadcasts are still owned by the state, some transmitters are owned by commercial stations. Adnan Osmanagić said a state monopoly still exists in allocating locations for transmitters and that fees for maintaining these locations are extremely high.

Internet access is not restricted by the state or private conglomerates. The CRA is in charge of this area and imposes rules of conduct on Internet providers. For example, the CRA obliged telecommunications operators to offer more favorable Internet services by the end of October 2005, with the goal of supporting growth in Internet usage. This included a rate scheme in which special numbers for use by Internet Service Providers would be available at prices more favorable than those for voice services.

Presses in B&H are mostly in private hands. But panelists said the political and business interests of owners of printing companies have resulted in selective approaches to clients. As a consequence, some media outlets, unable to reach agreement with local printing companies, switched to presses elsewhere in the region.

## Panel Participants

**Vildana Selimbegović**, Editor-in-Chief, *Dani* magazine, Sarajevo

**Amir Zukić**, Editor, PBS, Sarajevo

**Jasna Kilalić**, Democracy Office, USAID, Sarajevo

**Dino Đipa**, Director, PrismResearch, Sarajevo

**Mehmed Halilović**, Assistant Ombudsman for Media, Sarajevo

**Dunja Mijatović**, Director of Broadcasting, CRA, Sarajevo

**Milivoj Šiljegović**, Chemonics USAID Media, Sarajevo

**Dario Novalić**, Director, *Start* biweekly magazine, Sarajevo

**Adnan Osmanagić**, Director, Radio Stari Grad, Sarajevo

**Borka Rudić**, Journalist Association BH Novinari, Sarajevo

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

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## Moderator

**Tarik Jusić**, Program Director, Mediacentar Sarajevo

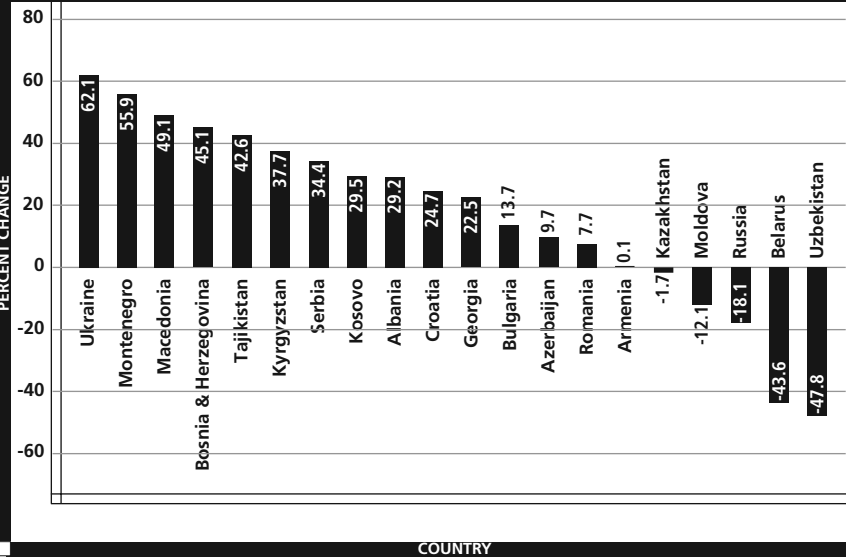
*Disclaimer: The views and opinions presented in the chapter on Bosnia and Herzegovina are those of the panel participants and do not necessarily reflect the views and opinions of the Mediacentar Sarajevo.*

# BOSNIA AND HERZEGOVINA AT A GLANCE

## GENERAL

- **Population:** 3,832,301 *Agency for Statistics of Bosnia and Herzegovina; June 30, 2003*
- **Capital city:** Sarajevo
- **Ethnic groups (% of population):** Bosniak 48%, Serb 37.1%, Croat 14.3%, other 0.6% *CIA World Factbook*
- **Religions (% of population):** Muslim 40%, Orthodox 31%, Roman Catholic 15%, other 14% *CIA World Factbook*
- **Languages (% of population):** Bosnian, Serb, Croat (no percentage data)
- **GDP:** \$8.530 billion (2004) *Bulletin No. 2, Central Bank of BiH; June 2005*
- **Literacy rate (% of population):** 94.6% (over age 15), (2002) *UNDP Human Development Index*
- **President or top authority:** Tripartite rotating presidency (eight months each); current president: Ivo Miro Jović (Croat); other two members: Sulejman Tihić (Bosniak), Borislav Paravac (Serb)
- **Next scheduled elections:** 2006

## MSI AVERAGE SCORES—PERCENT CHANGE 2001–2005



## MEDIA-SPECIFIC

- **Newspaper circulation statistics (total circulation and largest paper):** Official circulation statistics are not available.
- **Reading rates of daily newspapers (from at least once a week to every day):** *Dnevni Avaz* 60%, *Oslobodjenje* 13%, *Blic* (S&M) 13%, *Glas Srpske* 11%, *Vecernje Novosti* (S&M) 9%, *Vecernji List* (Croatia) 9%, *Jutarnji List* (Croatia) 8% *Mareco Index Bosnia*
- **Reading rates of magazines (from at least once a week to every day):** *Azra* 14.7%, *Gloria* (Croatia) 12.5%,

*Dani* 9.4%, *Slobodna Bosna* 7.2%, *Expres* 5.3% *Mareco Index Bosnia*

## VIEWING/LISTENING RATES:

- **Television stations:** Federal TV 18%, Pink BiH 11.6%, Mreža Plus 11.4%, Croatian TV I (Croatia) 7.2%, RTL (Croatia) 7.2% *Mareco Index Bosnia*
- **Radio stations:** Radio BIG 9.2%, BN Radio 6.5%, BM Radio 5.6%, Kalman Radio 5.1%, Radio Stari Grad 5.1% *Mareco Index Bosnia*
- **Number of print outlets, radio stations, television stations:** 7 daily newspapers, 46 weekly and monthly newspapers, 42 television stations, 143 radio stations (2004)
- **Annual advertising revenue in media sector:** NA (Estimates place ad revenue at around 50 million KM net [€25 million], while gross value amounts to around 100 million KM net [€50 million].)
- **Number of Internet users:** Approximately 55,000 private users, 32,000 companies, approximately 3,000 users in the education sector (Dunja Mijatović, "Digital Distribution—Present and Future," in *Novi pogledi*, Vol. 1, No. III, summer 2004, p. 59)
- **Number of information agencies:** 7

## MEDIA SUSTAINABILITY INDEX: BOSNIA

