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BOSNIA & HERZEGOVINA

During the past year in Bosnia and Herzegovina (BiH), much-needed reforms in public administration, social care, education, and anti-corruption measures stagnated. The country slid into further socio-economic crisis and political stalemate.

In February 2014, a protest over the problems with workers' rights, social welfare, and corruption was held in Tuzla. The movement spread quickly to numerous cities, mostly in the entity of the Federation of Bosnia and Herzegovina (FBiH), resulting in the resignations of four cantonal governments. The authorities attempted to portray the protests as attacks of one national/ethnic group against another, a display of hooliganism, and even terrorism, rather than an expression of citizens' dissatisfaction with the overall socio-economic situation. In addition to arbitrary arrests and police brutality against protestors, media outlets were subpoenaed to hand over all footage of the protests.

In May 2014, BiH was struck by the most severe rainfall ever recorded in the country. The storms caused catastrophic floods and landslides, affecting 60 towns and cities and about 75,000 homes, according to a European Commission assessment. With the devastating consequences to agriculture, small businesses, and public infrastructure, and authorities failing to respond adequately, some communities are still struggling to recover and meet basic needs.

The general elections held on October 12, 2014 brought victory to nationalist parties, but also a reshuffling of the civic-inclined vote. The Social Democratic Party suffered a big loss of votes, most of which went to the newly formed Democratic Front. A coalition gathered under the Serbian Democratic Party challenged the position of the Alliance of Independent Social Democrats (SNSD) in the entity of Republika Srpska (RS), especially in terms of votes for the state parliament. Soon after election results were announced, the online outlet klix.ba published leaked audio of RS Prime Minister Željka Cvijanović talking about bribing two members of parliament to ensure a parliamentary majority for the RS ruling coalition. Police interrogated the website's journalists and threatened them with criminal charges for publishing unauthorized recordings. The pressure peaked on December 28, when police barged into the offices of klix.ba and seized its digital material, documents, and equipment. Meanwhile, the SNSD-led RS government was constituted without disruptions, and Cvijanović was reinstated as the prime minister.

Political interference and an unfriendly business environment still plague the media sphere. Scores for most of the five MSI objectives changed little from last year, and the country's average score of 2.03 is nearly identical to last year's average. The objective related to business indicators scored the lowest (1.58), accentuating the structural features of the business environment—which, combined with a lack of protective fiscal policies, hinder media progress. Recent major events in the country revealed drawbacks related to professional norms, including biased reporting and poor use of background information. Although media laws scored the best (2.56), even showing modest improvement, implementation mechanisms remain flawed, while some important issues, most of all ownership transparency and concentration, remain unregulated.

BOSNIA & HERZEGOVINA at a glance

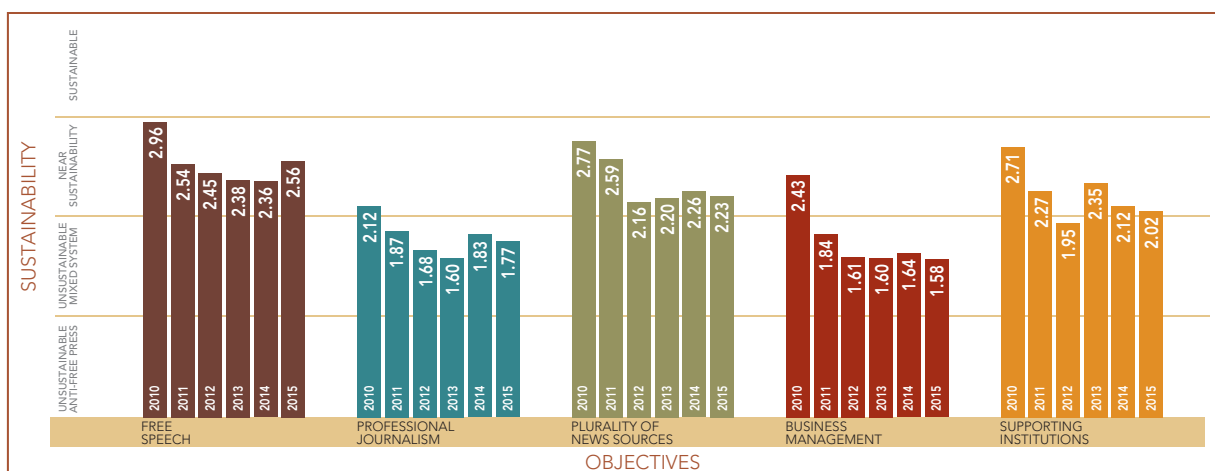
GENERAL

- > Population: 3,871,643 (2014 est. *CIA World Factbook*)
- > Capital city: Sarajevo
- > Ethnic groups: Bosniaks 48%, Serbs 37.1%, Croats 14.3%, others 0.6% (2000 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 (2013-Atlas): \$18.31 billion (World Bank Development Indicators, 2014)
- > GNI per capita (2013-PPP): \$9,660 (World Bank Development Indicators, 2014)
- > Literacy rate: 98%; Male 99.5%, Female 96.7% (2011 est. *CIA World Factbook*)
- > President or top authority: Members of BiH Presidency: Bakir Izetbegović (since November 10, 2010), Miladen Ivanić (since November 17, 2014), Dragan Čović (since November 17, 2014)

MEDIA-SPECIFIC

- > Number of active print outlets, radio stations, television stations: 9 daily newspapers, 189 periodicals (magazines, publications, of diverse content) (The Press Council of BiH); Radio Stations: 142; Television Stations: 43 (Communications Regulatory Agency)
- > Newspaper circulation statistics: N/A
- > Broadcast ratings: Top three television stations: RTVFBiH (14.10%), OBN (10.12), Pink BiH (9.22%) in November 2014 (Audience Management, as reported by RTVFBiH)
- > 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)
- > 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., Agency Fabrika)
- > Internet usage: 2,188,429 or 57% of the population (Communications Regulatory Agency, 2013)

MEDIA SUSTAINABILITY INDEX: BOSNIA & HERZEGOVINA



MEDIA SUSTAINABILITY INDEX 2015: OVERALL AVERAGE SCORES



CHANGE SINCE 2014

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

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: 2.56

The overall score for the legal framework increased by 0.20 compared with last year. The change might be explained by a few incidental positive cases, rather than systematic improvements. The significant jump for indicator 6 mostly can be attributed to the surprising positive outcome of an appeal in a libel case against journalist Ljiljana Kovačević. Otherwise, progress is lacking. Some missing laws, primarily on ownership, still have not been adopted, and a few policy initiatives threaten to bring retrograde solutions.

As in previous years, the relatively high scores for legal and regulatory frameworks reflect the formal guarantees of media freedom within the constitution and a few commendable laws, such as the Freedom of Information Act and the libel law. However, panelists said that implementation mechanisms are considered relatively weak, the independence of the judiciary is questionable, and public reactions to instances of violations of media freedom are perceived as insufficient.

This year, two legal factors caused additional discontent. The government's development of regulations on media transparency and concentration of ownership has stalled. In addition, a recent initiative for legislative changes, in the form of the Pre-Draft Law on Electronic Communication,

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.

First, although the law puts the burden of proof on the plaintiff, courts apply that tenet inconsistently, according to Mehmed Halilović, an associate of Internews. Furthermore, the frequency of libel charges, as well as high compensation for emotional distress if libel is proven, can be an excessive burden for journalists and media.

could prove to be a step backward. The initiative would abandon previous positive developments and possibly limit the powers of the Communications Regulatory Agency (CRA), a state body established under the Law on Communications of BiH. For example, the initiative imprecisely defines the roles that the Council of Ministers and Ministry of Communication would play in working with CRA. This presents the possibility that CRA's authority could be limited. Legislators have been envisioning adopting a new set of rules related to the law, without exploring the option of updating the existing rules. The draft law also includes penalties for violating rules that have not yet been adopted.

Licensing is not used to limit media diversity or silence media. In 2013, media observers began questioning the future independence of broadcast licensing procedures, due to the appointment of CRA council members that are considered highly politically affiliated. However, this year's panelists indicated that the procedure has stayed apolitical, with appointments based on legitimate criteria. However, CRA still suffers from political pressure, and the agency has not appointed a director general after seven years of attempts, due to lack of political agreement. The Council of Ministers of BiH failed to discuss the appointment of the last proposed candidate, Srđan Rajčević. Furthermore, Kemal Huseinović, who performed the duties of general director of CRA for years, resigned on December 11, 2014 for personal reasons. At this point, no one knows when the Council of Ministers will reach an agreement and appoint a new director, panelists said.

With regard to print and online media, the government does not require owners to go through any licensing procedures. Entities only need to register in their respective courts, like any other business.

Media outlets are not subject to restrictions with registration, and they fall under the same market entry regulations as all businesses. Taxation for media outlets is

also equivalent to all other business types. Although political discussions in the 2014 pre-election period involved some talks about differentiated taxation, specific steps in this direction are not expected. Panelists said that print media are in an especially difficult position, with the greatest fall in revenues and without any protective measures from the state.

Media professionals report different kinds of pressures to the Free Media Help Line, a service provided by the Bosnia and Herzegovina Journalists Association. The 2014 count reached 36 cases by December 5. Reported incidents included five physical assaults (one actually involving around 10 different attacks); two death threats; 16 other types of threats and pressure; five cases concerning defamation; and six cases related to labor rights and mobbing.

Those violations mostly came from criminal circles—but more alarmingly, police and state officials instigated some of the incidents as well. The political party SNSD published a “black list” of media: journalists and NGOs labeled as foreign mercenaries and disturbers of constitutional order in RS. The February protests saw several media professionals endure physical attacks. In one incident, a police officer pushed a RTV Slon camera operator that was recording protesters entering the Tuzla Canton building, damaging his equipment and material.

Additionally, courts in Sarajevo and Tuzla ordered the media to hand over all material recorded during demonstrations. The court in Sarajevo specifically addressed several major media: BHRT, RTV FBiH, TV1, Al Jazeera Balkans, *Dnevni avaz*, *Oslobođenje*, *Intersoft* (www.klix.ba), and TV1. Al Jazeera and TV 1 provided already published material, according to phone conversations with TV 1 editor Sanjin Bećiragić and Al Jazeera Balkans public relations manager Melina Kamerić. Bećiragić believes it is problematic that they were not informed on further use of these recordings. Klix.ba editor Jasmin Hadžiahmetović stated in a phone interview that they also provided the court with the material they already edited, and they were pressured to do so by direct threats with a court order. The online magazine *Žurnal* reacted in an interesting manner, calling on the courts to collect all the material they had published concerning corruption in government institutions, education, health system, etc.

Some sources suggest that only 15 percent of offenses against journalists result in rulings against perpetrators, and in 22 percent of cases, investigations are never opened.¹

¹ Siniša Vukelić, president of Club of Journalists in association of BH Novinari, in article at: <http://www.media.ba/bs/vijesti-i-dogadaji-vijesti/banja-luka-protetni-sastanak-povodom-pritisaka-na-rad-novinara>

Panelists also agreed that there is a pervasive lack of solidarity among journalists, and the wider community fails to react to pressure and attacks on journalists. Some of the panelists said that they are also convinced that journalists are discouraged because of the pressure and because the incriminating media reports they publish are met with indolence from state prosecution bodies. Panelists noted some exceptions to the latter, the major one being an investigation of the director of the Agency for Indirect Taxation after a report published by the Center for Investigative Reporting (CIN).

BiH has three public service broadcasters (PSBs): RTVFBiH, RTRS, and the state broadcaster BHRT (formerly known as RTVBiH). The laws on the Public Broadcasting System guarantee *de jure* independence and institutional autonomy of PSBs. Revenue sources, including license fees and advertising, contribute to their financial independence. However, changes to the law on RTRS, introduced in 2013, enable direct financing through the RS government budget and could be used for further political interference. In addition, the panelists confirmed that some appointments of managerial bodies in PSBs appear politicized. Panelist and secretary of the BHRT board of governors Emir Habul expressed the view that the politicization has become more obvious in the last few years. He commented that party-affiliated people are now on the boards, and ranking criteria are ignored to the point that people are elected that do not meet the criteria but are well connected. In 2013, marginalized by appointments at RTRS, CRA was completely ousted from the procedure, thus paving a clear path for political selections.

In addition to three PSBs, BiH has 12 public television stations (out of 43 television stations overall) and 61 public radio stations (out of a total of 160 radio stations). The broadcasters are founded and financed directly by municipalities and cantons, with no assurances that political loyalty is not a condition of funding. Many panelists expressed the belief that these media are in the service of local authorities, with appointments, discharges, and program focuses subject to their influence.

Libel law falls under the auspices of civil procedures, and while it is considered strong in terms of wording, its implementation drew questions from the panelists. First, although the law puts the burden of proof on the plaintiff, courts apply that tenet inconsistently, according to Mehmed Halilović, an associate of Internews. Furthermore, the frequency of libel charges, as well as high compensation for emotional distress if libel is proven, can be an excessive burden for journalists and media. For example, *Slobodna Bosna* magazine was driven to the brink of closure in November 2014 due to the financial impact of numerous

libel lawsuits (primarily from political actors). Halilović said that some of these lawsuits are a result of journalists' lack of responsibility, but they also indicate indirect or direct pressure on media, given that often the plaintiffs are political figures.

In addition, panelists expressed serious concerns with the ethnic, entity (FBiH or RS), and political biases of the judiciary in libel cases, especially when plaintiffs are public officials. For example, in previous years, Milorad Dodik's libel charges against FTV were judged differently depending on the entity in which the court was based. However, one 2014 court ruling, while not indicating systematic progress, could bolster confidence in the independence of the judiciary and account for the increase in the MSI score for libel. The case was regarding a publicly contested 2013 ruling of the court in Banja Luka against Ljiljana Kovačević for alleged libel in reports about a criminal investigation against the RS president. The ruling, which included compensation of €2,500 for emotional distress, was overturned by the Banja Luka county court in November 2014.

Web hosting companies and Internet providers are not held responsible for the content posted by their users. The panelists did not report any pressures on hosting companies in this regard.

The freedom of information laws at the entity and state levels guarantee free access to information. But implementation is limited and depends on the will of individual institutions and officials, and the affiliations between these institutions and media outlets. MSI panelists shared several examples of denial of information, unwillingness to provide statements, or preferential treatment of some media. Rubina Čengić, editor-in-chief of *Start* magazine in Sarajevo, reported waiting four months for an annex to a contract from the Faculty of Electrical Engineering; the faculty never replied. Sanja Mlikota, a journalist with *bljesak.info* in Mostar, said that the Federal Institute of Public Health refused to assist her outlet. "We tried to get information. We did not get it, and the next day, we saw an article on the same subject somewhere else." She reported similar problems obtaining replies from the city administration.

Preferential treatment also depends on entity fragmentations. Gordana Šarović, director of the Technical Information Center at the RTRS Istočno Sarajevo bureau, said, "We from RTRS have a general problem getting information from federal institutions."

CIN has filed several court appeals against public institutions over being denied requested information. With CIN's success in finally being granted the information, a positive court practice is being established. But public institutions still

Nataša Tešanović, director of ATV television, noted, "A big part of important events in Bosnia and Herzegovina remains uncovered by the media. They may be covered as protocol events or as bare daily reports, but preference is given to politics, day-to-day events, and so-called yellow or sensationalist topics."

hinder access, and the immediate effects are limiting for journalists. Often by the time the court process is over, the requested information has become irrelevant; and unlike CIN, media companies usually do not have the resources to go through relatively lengthy procedures.

Access to news sources is unrestricted. Standards for fair use and protection of authorship rights exist, and are implemented fairly well in the broadcast media (under the authority of CRA). But standards for print media, and online media to an even greater extent, remain problematic. The panelists mentioned several instances of their work being republished without their approval, without adequate attribution, and/or with changes that corrupted the meaning or left out important aspects of the story. CIN journalist Mirjana Popović mentioned a recent example. Just before the 2014 elections, CIN published an article on the financial assets that some candidates have failed to report. Another outlet republished the article but left out the information on Fahrudin Radončić, the leader of the Party for Betterment and the former official owner of *Dnevni Avaz* daily. The regulatory system in broadcasting, and self-regulatory procedures in the print and online media sectors, provide a possibility for recourse for journalists in such cases, but the misuse of their work continues and is still not rare.

Entry into the journalist profession is not restricted or subject to major political influences. Journalists do encounter restrictions in practicing their profession, however. In 2014, a journalist and editor of *Reprezent* magazine reported being prevented from attending events organized by the Velika Kladaša Municipality. Journalists with BN television and Beta agency from Serbia are still denied accreditations for entry in the RS presidential palace. Based on the panelists' experience, more commonly media are restricted through selective invitations to public events. Semina Ajvaz from Džemal Bijedić University gave

an example: “Recently in Mostar, where Dragan Čović was holding a press conference related to coalitions, only certain journalists were invited by telephone... We have a lot of these situations.”

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Bosnia Objective Score: 1.77

After it saw some improvement in 2013, Objective 2 scored around the same as last year at 1.77. This was the second-lowest score among all objectives and below the overall country score. Most of the indicators scored within half a point of the objective score, with only indicator 4 (coverage of key events) an outlier at about three-quarters of a point higher than the objective score.

Often journalists fail to back their reporting with fact-based evidence, sources are unreliable and unbalanced, and there is a lack of distinction between facts and assumptions. Often such faulty reporting results from significant political influence on the media. Ajvaz pointed out that media coverage of the 2014 elections was unbalanced, with certain political actors promoted at the expense of others. This corresponds with the Media Plan Institute’s election campaign monitoring, which found a predominant media bias towards the ruling parties² and a failure to provide analytical or critical independent viewpoints.³

Within the self-regulatory system monitored by the Press Council, professional ethics are dependent on the responsibility of print and online media, since media are not subject to sanctions for violations of the established Press Code. Television and radio broadcasting fall under the jurisdiction of CRA, which monitors the implementation of ethics codes and regulations. Standards are vastly ignored, however, and broadcast media still succumb to hate speech, one-sided reporting, or even intentional misrepresentation of facts. The “Shadow Report” on the EU integration of Bosnia and Herzegovina states “There is a Code of the Press and codes for broadcasters that require professional media reporting, but these documents do not comply consistently and effectively nor are they equally accepted by numerous media in BiH.”⁴

² First preliminary report on media coverage of contestants during the election campaign period, Media Plan Institute, September 2014: <http://www.mediaplan.ba/docs/2014FirstPreliminaryReportEN.pdf>

³ Second preliminary report on media coverage of contestants during the election campaign period, Media Plan Institute, October 2014: <http://www.mediaplan.ba/docs/2014FirstPreliminaryReport2EN.pdf>

⁴ “2014 Alternative Progress Report: Political Criteria,” Initiative for the Monitoring of the EU Integration of Bosnia and Herzegovina, http://adi.org.ba/wp-content/uploads/2014/07/Alternativni-izvjestaj-2014_ENG_za-web.pdf, p. 22, Sarajevo, July 2014

It is even more difficult to set professional and ethical standards in the online sphere, since the number of online media outlets is increasing and many provide no information on the identities of their owners, editors, or journalists. Paired with their biased reporting, the anonymity of such portals leaves a clear impression that they are established with the sole purpose of political promotion.

A striking example of false reporting, which spread from semi-anonymous online portals to mainstream state-owned media, can be found in reports on the mass protests from February 2014. Media were saturated with false information linking the protesters to anything from looting and disseminating drugs to attempting an armed coup d’état. Broadcast media reports, especially by public outlets, favored officials’ positions and portrayed protesters as hooligans or assigned ethnic animosities and connotations to the protests. Although these accusations were quickly proven to be entirely false, none of the media outlets issued official retractions or apologies for misleading the public.⁵ Small independent media (such as the online portal AbrašMedia) and local television stations (TV Slon in Tuzla) were the only outlets to report accurately.

Another instance of biased media conduct during the February protests took place in Mostar. The police formed a cordon that prevented protestors from going to the west side of the city, mirroring the wartime ethnic-based separation line. Although this went on for weeks, and occasional cases of police brutality occurred, only a few

⁵ “Bosnian media, have we been to the same protests?” Istinomjer, <http://istinomjer.ba/bosnian-media-protests/>

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).

independent online media reported on the events, while they received no mention in the mainstream media.⁶

The panelists noted that in the course of the general election campaign, the media failed to impose relevant topics against the regular, unsubstantial political rhetoric. However, they also saw less discriminatory and hate speech than in previous elections. CRA received only 11 complaints during the election campaign, but Asja Rokša Zubčević, head of the CRA Division for Audiovisual Services and International Cooperation in Broadcasting, said that this does not show that reporting is held to professional standards. He said it is more a sign that society as a whole has become more passive and disinterested. The complaints came from political subjects themselves, and half of them were concerned with preferential treatment of certain political entities in the broadcast media (the Election Law of BiH prescribes that the media are obliged to provide fair, balanced, and nondiscriminatory reporting, giving the same amount of time and equal treatment to all political subjects partaking in elections). CRA did not adjudicate these complaints during the election campaign, leading some to conclude that an opportunity was missed.⁷

All of the panelists recognized omnipresent self-censorship in the media as an expected outcome of tight political and financial affiliations. The media tend to side with their political and institutional patrons and simply transmit their messages without adding a critical angle, presenting the other side, or even checking the accuracy of the given statements. Popović noted that journalists also tend to become too amicable with their sources, leading to reluctance to ask sources potentially uncomfortable questions.

Regarding reporting on the most important issues and events, the media offer a large amount of coverage, but very limited quality or plurality of information or insight. Nataša Tešanović, director of ATV television, noted, "A big part of important events in Bosnia and Herzegovina remains uncovered by the media. They may be covered as protocol events or as bare daily reports, but preference is given to politics, day-to-day events, and so-called yellow or sensationalist topics."

On the other hand, Tatjana Sekulić, a web editor at television N1 and the former editor of Klix.ba, the most visited online portal in BiH, pointed out that citizen

reporting has a positive influence on online media. Internet sites receive valuable information from citizens, bloggers, and social media users that would otherwise be ignored in the mainstream media.

All panelists agreed that journalists are underpaid, especially those at commercial and small media outlets. There are large discrepancies between the salaries of high-level managers and journalists, but also between overall salaries of media professionals that work for international media (such as Al Jazeera) and those who work for BiH national media. The pay scale is yet another discouragement from engaging in serious investigative reporting, since journalist salaries do not compensate for the amount of work or stress inherent to this kind of work in the current social and political climate. Due to insufficient compensation, many journalists are forced to work for more than one employer or take additional jobs outside the media sector, which also affects the quality of their journalism work. Financial insecurity can also make them susceptible to corruption, and Sekulić pointed out that newcomers in the profession are often forced to volunteer for months or even years.

Private media and state-owned media still lack financial transparency, according to Čengiđ. One such example is Federal Television; according to its latest audit report, the director set salaries and other compensation arbitrarily and contrary to the internal rules.

The balance between entertainment and news reporting has shifted slightly towards entertainment content, although BiH still has exclusively news-oriented media and the majority of broadcasters do produce news and information content. However, the public interest value of these programs remains questionable without relevant monitoring. News stations such as Al Jazeera Balkans or the recently founded TV station N1 do not succeed in attracting a significant audience. Most BiH viewers remain loyal to entertainment channels and traditional news outlets, as noted by Senad Zaimović, director of the advertising agency Fabrika. The proliferation of online media has also contributed to this shift, since they mostly focus on entertainment content, due to its commercial profitability.

Technical resources for media production and broadcasting are still scarce and insufficient, especially at state media and small, local media. Boro Kontić, director of Mediacentar Sarajevo, said that public television broadcasters lag behind major private media in terms of signal quality. Small media outlets face even bigger challenges, given their lack the financial resources to provide even the basic equipment, said Reuf Herić, a representative of the Association of Private Radio and Television Stations and director of Radio Q in Visoko.

⁶ "2014 Alternative Progress Report: Political Criteria," Initiative for the Monitoring of the EU Integration of Bosnia and Herzegovina, http://adi.org.ba/wp-content/uploads/2014/07/Alternativni-izvjestaj-2014_ENG_za-web.pdf, p. 20, Sarajevo, July 2014

⁷ Third Preliminary Report on Media Coverage of Contestants during the Election Campaign Period, Media Plan Institute, October 2014, <http://www.mediaplan.ba/docs/2014FirstPreliminaryReport3EN.pdf>

The panelists pointed out that BiH media produce little or no investigative journalism. Most outlets are still highly dependent on political will, with poorly skilled and paid journalists and media owners more interested in sensationalist stories than quality reporting. Asja Rokša-Zubčević said, "There are almost no examples of investigative journalism, since this kind of journalism primarily requires a financial foundation and political independence."

One of the very few exceptions is CIN, an organization based on grant funding that allows thorough research of the topics it covers. Recently published stories include a report on the thermal power plant in Tuzla, which fails to comply with the regulations and thus endangers the health of citizens in the local community; unequal access to health services in the country; FBiH ministers' misuse of public funds for personal accommodations and expenses; and a series of reports on the registered and unregistered properties of state officials.

In contrast, BiH media cover general topics randomly, superficially, and without follow-through. As Sekulić indicated, "Journalists who try to report impartially and freely are often targeted by political and other groups, and attacks on journalists are not uncommon, either." While some journalists lack the time and financial or professional support from their editors, others lack the professional skills required to produce quality reporting. A rising trend in the industry is hiring reporters that are improperly trained, uneducated on professional standards and journalistic ethics, inadequately informed about the topics they cover, and unaware of what the role of the media should be in a democratic society.

The panelists were unanimous that BiH media do not provide any kind of specialized programming or profound insight on many topics or areas. The number of journalists that are experienced and specialize in certain topics is on the decline, as media owners prefer the greener and cheaper workforce. Online media are particularly prone to this hiring policy, sacrificing quality and professionalism for the sake of producing more material at a lower cost and higher speed. Habul pointed out that having correspondents for specific areas was well established within the editorial boards of pre-war BiH media, but this is no longer the case. Editorial boards are downsized continuously in order to cut down costs. Journalists are expected to cover a multitude of topics without going into depth on any of them.

OBJECTIVE 3: PLURALITY OF NEWS

Bosnia Objective Score: 2.23

The score for this objective is about the same compared with the previous year, moving from 2.26 to 2.23. Coverage of minorities (indicator 7) remains the lowest-rated indicator, followed by indicator 3 (independence of public/state-owned media) and indicator 6 (transparency of ownership); all scored about three-quarters of a point lower than the objective score. Indicator 2 (citizen access to media) scored almost a full point higher than the objective score.

BiH does have a plurality of media sources of different types and profiles. There are currently three public service broadcasters (each including one television and one radio station), 43 television stations,⁸ 160 radio stations,⁹ nine dailies, and more than 100 different kinds of magazines, as well as a multitude of online media.

However, the media sphere lacks a plurality of viewpoints, especially at the level of individual media outlets. Rokša-Zubčević emphasized: "I wouldn't exactly say we have true plurality. In a good number of cases, we have three truths for the same thing when we go through the media." Other panelists agreed, concluding that media consumers

⁸ Licensees for Television Broadcasting; Licensees for Television Broadcasting over other Electronic Communication Networks, CRA documents, <http://rak.ba/eng/index.php?uid=1276851773>

⁹ Licensees for Radio Broadcasting, CRA document, <http://rak.ba/eng/index.php?uid=1276851773>

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.

would need to regularly follow and compare several media sources to get a comprehensive picture incorporating different views and perspectives.

The use of social media, including sharing news, remains widespread. Facebook is the most visited site on the Internet, while YouTube comes in third.¹⁰

BiH laws impose no obstacles to media access, either in terms of bans or restrictions on specific media or obtaining technical equipment such as satellite antennas. However, economic disparity remains a restricting factor. The panelists indicated that many people cannot afford subscriptions to television distributors, let alone daily access to print media outlets. Basic cable packages cost around €12 per month, while the average subscription to print editions of daily newspapers is around €15 a month, or half a Euro per copy. This is a considerable cost in a country in which the average salary is €417 per month. Although the number of cable companies is rising, they offer only preselected channels in their packages, and users can only choose between the packages, not which specific channels they will get.

According to the latest CRA survey, the overall number of users of IPTV packages and bundles rose from 207,804 in 2012 to 314,422 in 2013.¹¹ This amounts to 27 percent of all households in BiH (according to preliminary results of the 2013 census).¹² CRA's internal research shows a different result, with the number of users rising from 141,320 in 2012 to 219,336 in 2013.¹³

Rokša-Zubčević pointed out that rural and urban areas are not covered equally with Internet, cable, IPTV, and similar infrastructure. As a result, the rural, older, and less educated demographics have much less exposure to a variety of media outlets. For example, although access to IPTV is rising even in rural areas, it is still not distributed equally, so rural areas get their information mostly through local media and major state-owned media.

Ajvaz also pointed out that even the entity public service televisions are not distributed evenly in the entire territory of BiH. However, the television audience's predisposition to choose its news sources based on the territorial/ethnic

division is a bigger problem, as it limits awareness of events and perspectives from other parts of the country.

The independence of state-owned media rated among the lowest of all indicators for Objective 3. The score was due to the panelists' sense that state television outlets mostly serve political party interests, rather than the interests of citizens and the public in general, and are not open to alternative or critical viewpoints. The Media Integrity Matters study found state-owned media to be heavily influenced by the political elites, primarily reflected through "politicized procedures for the appointment of management structures."¹⁴ Sekulić noted that state media's politically biased reporting has instigated a widespread boycott of public television subscriptions, with many citizens refusing to pay the subscription fee. An ongoing dispute about whether the needs of Croats in BiH are represented well enough in the existing PSB system further contributes to the low collection rate. Croat political leaders have argued for establishing a new public broadcaster in the Croatian language, while some analysts, according to the Media Integrity Matters report, "point out that the issue of a fourth broadcaster is based on ethno-national populism rather than on the consideration of actual needs." In addition, media experts question financial and administrative feasibility and call for rationalization of the system, partly through the establishment of a corporation. In the meantime, discourse of the Croat political elites in BiH has had dire effects on the functioning of PSB, given that it dramatically lowered the rate of license fee collection among Croats in BiH.

Ajvaz said that state television station BHT offers more balanced and objective reporting than the entity stations, but has significantly lower ratings. The panelists also expressed the belief that the quality of public broadcast content is insufficient, especially given the lack of educational programs.

The media have fewer and fewer financial resources to afford news agency services, especially from international agencies. Instead, some outlets steal this content and do not provide proper credit.

Currently, BiH has eight different agencies, including two public, three private, one owned by the Turkish government, and two owned by religious communities. Patria, the newest agency, was founded in 2014 and provides services free of charge—but its credibility has been questioned. Kontić noted that an analysis outlined a political agenda behind

¹⁰ Alexa rankings for Bosnia and Herzegovina, <http://www.alexa.com/topsites/countries/BA>, accessed on 22 December 2014.

¹¹ Annual Survey of CRA Internet Service Provider Licensees in Bosnia and Herzegovina for 2013 (Godišnja anketa korisnika RAK dozvola za pružanje internet usluga u Bosni i Hercegovini za 2013. godinu), CRA document, <http://rak.ba/bos/index.php?uid=1272548201>

¹² Preliminary results of the 2013 Census of the Population, Households and Dwellings in Bosnia and Herzegovina, Agency for Statistics of BiH, http://www.bhas.ba/obavjestenja/Preliminarni_rezultati_bos.pdf

¹³ Assessment of the State of the Telecommunications Market in BiH 2013 (Ocjena stanja tržišta telekomunikacija u BiH 2013), CRA document, <http://rak.ba/bos/index.php?uid=1339152712>

¹⁴ Media Integrity Matters: Reclaiming Public Service Values in Media and Journalism, Peace Institute, Ljubljana, Slovenia, 2014; p. 152. http://mediaobservatory.net/sites/default/files/media%20integrity%20matters_za%20web_FINAL.pdf

the news agency.¹⁵ Another indication of political bias in news agencies emerged during the February protests, when some factually false reports from private and state-owned agencies¹⁶ were transmitted by media that use their services.

Private media produce their own news, although the scope and quality of such content depends primarily on their capacities and resources. Rokša Zubčević said, “Most television stations broadcast a primetime news program, as well as several brief news overviews during the day... On the other hand, some private stations only broadcast brief news overviews, mostly made up of agency news. Some television stations broadcast news in the form of an announcer reading the news, followed by several, if any, features or live reports.” Sekulić explained that some private media might be in a position to publish more balanced news, but generally they are not considered independent from major political powers. Herić pointed out that commercialization hinders the quality of private media news programs.

Scores assessing the transparency of media ownership were lower than last year as well, mainly due to a rise in the number of anonymous online portals that provide no information on their ownership, editorial boards, or even the identity of their reporters. The panelists said that the Patria agency is a particularly worrisome example of a non-transparent ownership structure. Zaimović emphasized that, for these reasons, it is imperative to establish a standard for media registration and media ownership transparency that extends to news agencies.

Rokša-Zubčević pointed out a similar ownership problem with cable providers. The Council of Competition of BiH is currently investigating several cases on concentration of cable companies. However, the panelists indicated that the council will likely not be able to reach a unanimous decision, and thus the issue will remain unresolved.

BiH remains without a legal registry of online media. An additional cause for concern—and perhaps the main reason why the score for transparency of ownership fell—is that state authorities failed to initiate any major policy changes in 2014 concerning transparency of ownership. A study published this year concluded, “The concentration of ownership has been completely unregulated since 2006, when the Rules on Media Concentration and Ownership of Electronic and Print Media (adopted in 2004) expired.

Relevant institutions did not show significant interest in developing proper policies in this regard.”¹⁷

The ethnic fragmentation of BiH society is reflected in the media. Public broadcasters are obligated to cover certain groups, such as refugees and displaced persons, ethnic/national minorities, and vulnerable groups¹⁸ and to provide educational and children’s programming. But panelists said that the level of fulfillment and the content quality are questionable. As Kontić indicated, media reports exclude most groups of citizens as political or social subjects and focus on the three “constituent peoples.” Čengić noted that minorities are either not covered by the media, or are covered in a repetitive and stereotypical manner. Constituent peoples that live in territories where they are demographic minorities receive similar treatment. Broadcast media offer no programs in the languages of national minorities.

Tešanović noted that the media are not doing enough to establish the use of gender sensitive language. Other panelists indicated that sexual and gender minorities are largely underrepresented in the media, including the state-owned broadcasters, while the representation of women in the public sphere and media also remains limited and perpetuating of stereotypes.

Content that accommodates the needs of certain citizens is rare, but Rokša-Zubčević noted an exception: “In the Kotor Varoš and Konjic regions, there are stations that broadcast news and information programs adjusted for people with hearing difficulties.” Overall, the media needs to better portray diversity, and media professionals improving their education is a prerequisite to regular reporting on minority issues, panelists said.

With the exception of a few thematic shows on state television stations, state-level and entity-level public media cover local news inadequately. Local media fill the gap to some extent, but their resources are limited. As a result, often public media resort to “copy-paste” journalism—reporting on large-scale events covered in other media, rather than producing their own content. Herić pointed out that local media do produce news related to their communities, but frequently local politics influence media outlets, affecting the quality and credibility of their work. The same is true of online portals focused on local news, although some locally oriented blogs and portals provide

¹⁵ The panelist here refers to the article “Media Quarrel in the SDA Family” (Medijska svada u SDA porodici) by Paulina Janusz, published 5 October 2014, Mediacentar online, <http://www.media.ba/bs/mediametar/medijska-svada-u-sda-porodici>

¹⁶ “Bosnian media, have we been to the same protests?” Istinomjer, <http://istinomjer.ba/bosnian-media-protests/>

¹⁷ Media Integrity Matters: Reclaiming Public Service Values in Media and Journalism, Peace Institute, Ljubljana, Slovenia, 2014; p. 123 http://mediaobservatory.net/sites/default/files/media%20integrity%20matters_za%20web_FINAL.pdf

¹⁸ “Living Diversity: Assessment of Needs Related to Treatment of Diversity in Media Content” (Živjeti različitosti: Procjena potreba u pogledu tretmana različitosti u medijskim sadržajima), Media Centar Sarajevo, May 2013; p. 5, URL: http://www.media.ba/sites/default/files/procjena_potreba_mediji_i_razlicitosti_u_bih_final_20.06.13.pdf

a more critical and independent perspective. Media cover most major state-level events, although the coverage, as noted earlier, might be highly dependent on the political background of the outlet in question.

Generally, news on international events is available through domestic and international media outlets. However, regional media outlets such as Al Jazeera and N1 still have a limited audience reach.

OBJECTIVE 4: BUSINESS MANAGEMENT

Bosnia Objective Score: 1.58

Media business operations scored the lowest of the five MSI objectives. The media sector is stagnating due to a highly unfriendly business environment. Media companies generally welcome the entrance of foreign capital through regional television stations, but those business operations stand in stark contrast to the grim conditions at most domestic media. There were no indicators that stood out as performing significantly better than the rest; all indicators scored within half a point of the objective score.

Only a few larger media outlets are truly self-sustainable enterprises, while the majority of media are on the brink of bankruptcy. This is a result of structural shortfalls that individual workmanship can hardly overcome, but some media suffer additionally from a lack of human capacity and expertise in business planning, marketing, and financing. The overall picture on business operations is somewhat improved by the founding of new television broadcaster N1 (a regional partner of CNN, with offices in Zagreb, Sarajevo, and Belgrade) as well as Al Jazeera Balkans.

Public media, especially three public service broadcasters, are believed to be organizationally inefficient. Zaimović underscored the look of their “mastodon-style buildings,” noting that their expenses are 98 percent, while just two percent of their budgets go to programming. The panelists also indicated that ethnic and political fragmentation further corrupts the market and restricts business operations.

Public service broadcasters face difficulties collecting their license fees. Collections in 2012 were around €29.31 million—less than 74 percent of the invoiced amount, and 5 percent less than in 2011. Panelists said that some believe that the public service broadcasters’ dependence on commercial income jeopardizes their public service role, while putting private media in a more difficult position. Approximately 20 percent of PSB revenue comes from advertising—and the percentage climbs to almost 40 percent for FTV. Other types of revenue, as along with

media owners’ business ties to other industries, can also compromise media integrity.

Generally, media lean on just a few sources of revenue, putting centers of power in a position to influence, if not directly interfere with, editorial policies. Government institutions have been becoming more relevant revenue sources in the past few years, amid the backdrop of faltering advertising and fading donor support. Government funds include direct financing of local public broadcasters, advertising and other contracts with media (for coverage of certain events), and some donations (mostly by the RS government in previous years). Panelists said all of these funds are seen as possible instruments of political control, especially due to questionable selection criteria, lack of financial transparency, and little assurance of editorial independence.

A few relevant online media outlets are entirely dependent on donor support, to the extent that some have completely abandoned advertisements.

The BiH advertising market is underdeveloped and suffering losses, due to the economic crisis and the flow of revenue into foreign markets. The advertising agency Fabrika has estimated that overall revenues for advertising (including outdoor and media placements) do not exceed \$52 million. Fabrika assessed this as vastly insufficient for normal functioning of all BiH television, radio, print, and online media.

Leading advertisers include international companies such as Henkel, P&G, Coca-Cola, and Beiersdorf, which base their advertising practices on available, although limited,

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.

market indicators. Domestic advertisers (with two public telecommunication companies being the main example) are believed to hold close ties to political parties. Furthermore, some reports have identified corruption in advertising practices, including inadmissible dumping of prices based on personal affiliations, boosting of prices, money laundering, and drawing money from public companies and government bodies into private pockets and loyal media and agencies.¹⁹

The May 2014 floods also damaged the advertising market, leading international companies to withdraw ads in order to avoid the appearance of trying to capitalize on tragedy. That led to intense pressure on media companies competing for a share of the budget at any cost. Local media generally are not attractive to major advertisers, and the local print media sector has seen the greatest fall of revenue in recent years.

Foreign agencies with domestic offices dominate production of advertising content as well as mediation in securing advertising contracts. "They [foreign agencies] open their office from neighboring countries, or they hire one person and run the business from above and they don't need anything here," Zaimović said. He also commented that the position of domestic advertising agencies is worsening, leading to closures of local agencies. Only a few major news portals can generate significant advertising revenue, while others can hardly finance the work of journalists, he said.

Advertising on public broadcasting stations is limited to six minutes per hour, but some media members say that this does not provide sufficient protection for commercial media, given that local public media receive funds from local governments and are thus in a position to distort advertising prices. This system makes it impossible for commercial rival media to compete on an equal basis. In 2013, lawmakers introduced changes to the Code on Commercial Communication that lowered the limit to four minutes per hour for public media. Concern arose from within and outside the media community that the changes would further jeopardize the financial sustainability of public service broadcasters. The decision was finally overturned at the beginning of 2014.

Private media depend predominantly on advertising revenue, and the quality of news content is secondary to the imperative of commercialization and the interests of advertisers and owners, panelists said. The sector of non-profit media (which are denied the right to advertising income) remains underdeveloped, with only three registered radio stations financed by religious institutions and humanitarian organizations.

¹⁹ See more in Media Integrity Matters, at http://mediaobservatory.net/sites/default/files/bosnia%20and%20herzegovina_0.pdf;

For several years, the RS state government provided donations to different media, despite perceptions that the assistance served as an instrument of political control. The practice ceased in 2013 due to budgetary constraints, but the grip over media has not loosened since.

While public local media in BiH are financed directly from municipal and cantonal governments, government institutions also provide funding for media through advertising contracts, contracts for coverage of government work, specific events and projects, and so forth. There are no exact data, but some sources suggest that funding for local public media in 2012 was only around €7.87 million.²⁰

Only the larger media outlets can afford to tap audience research for their business planning. Adnan Osmanagić, director of the leading private radio station, Radio Old Town, reported in a phone interview that the station's program planning is based on regular audience data, now provided by Ipsos. However, the media research available in BiH does not cover all media sectors. Print media managers, in particular, have never shown much interest in participating in such research. Television audience measurement is methodologically the most advanced, based on people meters. But since 2011, some media members have expressed doubts about its reliability.

Online media outlets commonly use Alexa and Google Analytics. Only some of them use Gemius Audience research data, even though it is the only company of the three to provide valuable inputs on audience demographics. Herić said that aside from financial limitations, media do not buy research data because media managers often see it as a financial loss rather than an investment.

The score for reliability of audience data dropped significantly compared with last year, and is the lowest among all scores related to the media sector. Controversies leading to the data provider for the television sector changing, along with the breakdown of the Association of Media Industry (UMI), explain the fall.

UMI had functioned since 2006 as the owner of audience data and was composed of representatives of media outlets and advertising agencies, while Mareco Index Bosnia provided audience research. However, in recent years, disagreements swirled among UMI members, involving accusations of compromised data tailored to suit the needs of particular media players. Finally, in 2013 UMI lost its role, and at the same time, the new audience data provider

²⁰ Hadžović, "Majmuni na javnom servisu," MC Online, July 3, 2013. Article available at: <http://www.media.ba/bs/magazin-medijska-politika-regulativa/majmuni-na-javnom-servisu>

Audience Measurement (AM) entered the market. The Agency of Metrology of Bosnia and Herzegovina introduced a new requirement for certifying measurement equipment, while authorizing a laboratory—owned by the same group as AM—to issue licenses. While seemingly putting AM in a preferential position, AM reported that it did not prevent any provider from verifying its equipment inside or outside of BiH, in accordance with relevant regulations (according to an October 2014 letter by AM).

Only about a dozen media and advertising agencies are currently purchasing AM data, and Mareco Index Bosnia finally stopped providing data in April 2014. There is also a fear among media members that the strongest actors in the market are in a position to influence audience data, without any umbrella association to balance their particular interests. Because of these complications, Zaimović expressed pessimism about the future of the advertising market. “Now it’s a boat sailing in stormy seas,” he commented. “When the research falls, this market will become a junk market and all advertisers will withdraw.”

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Bosnia Objective Score: 2.02

The score for supporting institutions fell slightly this year compared with its 2014 score of 2.12. The score for indicator 2 (journalist associations) suffered a significant fall but stayed above the country average. All indicators were clustered within half a point of the objective score.

BiH has several media associations, including the Association of Electronic Media, the Association of Private Radio and Television Stations, and the Association of Local Broadcasters of the Republika Srpska. The government does not restrict their operations. Association activities generally go unnoticed—although Herić, a member of the Association of Private Radio and Television Stations, said that the association is fully functional and is now engaged in advocacy related to media policies.

As some panelists observed, even when associations are active, they advocate for differing interests. Asja stressed that according to CRA’s experience, broadcasters’ associations do not agree on minimum common interests. For instance, the industry was divided on recent changes to the advertising limit for public broadcasters, depending on particular business interests rather than the assessed benefit of the sector as a whole. Now, UMI has completely lost its role in commissioning market research, and currently the market has no actors tasked with balancing particular interests.

At least four journalist organizations are registered: BH Journalists, Association of Journalists of the Republika Srpska, Association of BiH Journalists, and Association of Croat Journalists from BiH. Some of these associations issue occasional statements concerning violations of media freedom, but beyond that rarely engage in substantial activities. These associations also have not displayed any positive steps to overcome their fragmentation by ethnicity and entity. The professional community shows greater solidarity only in rare cases. A recent example was the industry’s reactions to pressure on the online media outlet klix.ba. Reacting to this case, recent threats to the editors of the website tacno.net, and a variety of past violations of media freedom, Association BH journalists organized gatherings in several cities across BiH. At the beginning of 2015, the association articulated demands for institutional resolution of specific cases and overall improvement of media freedom, and announced a fierce fight for media freedoms in 2015.

Over the years, panelists have mentioned BH Journalists as the most active association, with a membership across ethnic and territorial lines. It offers legal support to journalists exposed to pressure (through the Free Media Help Line), reacts to violations of journalists’ rights and media freedoms, and conducts some research on the media sector.

The law and the constitution guarantee the right to trade union organization. Although unions do exist, with an estimated 15 percent of BiH journalists as members,²¹ they

²¹ Balkan Media Barometer, 2011.

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.

are fragmented along entity lines and widely believed to be inefficient in protecting journalists' rights.²² The drop in score for this indicator seems to be a result of past experience, rather than the outcome of any new issues.

Popović mentioned a few experiences in which CIN expected but did not receive association support. For example, last year CIN announced intern vacancies and attempted to publicize the posts through associations and universities, but these channels did not share the vacancy notices. He said that this had a discouraging effect on CIN's cooperation with associations.

As in previous years, the panelists assessed that NGOs lack sufficient dedication and power to protect media freedom. Rather than offering consistent support, NGO support is project-based, fleeting, and dependent on current thematic focus. The panelists only singled out a few organizations, including the Helsinki Committee for Human Rights, Transparency International, and Helsinki Citizens' Assembly Banja Luka, for their reactions to violations of media freedom. The slight improvement of the score for NGO support might stem from resonance of the successful engagement with civil society organizations in 2013. That engagement resulted in stopping detrimental changes to the Freedom of Information Act, after around 200 comments were submitted during public consultations. No similar cases took place in 2014.

Six universities provide journalism and communication education: the private College of Communication in Banja Luka; the public universities in Banja Luka, Tuzla, Sarajevo, and Istočno Sarajevo; and the two public universities in Mostar. The overall impression is that formal education does not ensure sufficient general knowledge or practical journalistic skills. However, Ajvaz stressed that practical training is included increasingly in the curricula, and at one specific university, a semester-long internship is required. It is common for students to work on media projects during their studies. For example, at the University of Tuzla, journalism students have an opportunity to engage in production of a student journal. *Karike* magazine and the website novinar.me are both edited by journalism students from different parts of BiH. The online magazine e-trafika started in 2011 as a student project, but was later included in several projects supported through donor grants.

Amid flagging donor support, the number of short-term training for media professionals has decreased in the past few years. Only a few organizations still offer classes; Mediacentar Sarajevo is the only one that the panelists

mentioned. A few panelists noted also that media managers show less readiness to allow their journalists to participate in additional education.

Lately, Mediacentar has been oriented toward journalism students, offering several training sessions per year. During 2014, these included two courses within the USAID-funded Supporting Independent Media program (training in online media production, with internships at online media outlets across BiH, as well as training in social networks, tools, and online media), as well as several classes supported by MATRA (education camp on data journalism; several workshops on open data, proactive transparency, and data journalism for media, NGOs, and students of journalism).

Internews in BiH has been providing training in media law, in cooperation with several universities. BH Journalists, Press Council, and occasionally the Sarajevo Open Center, the Youth Journalist Association, or the organization KULT also will offer some training.

The government places no restrictions on access to material and equipment for media production, and the sources of equipment and printing facilities are apolitical. Even in cases of common ownership over media, printing houses, and distribution channels, there are no reports of monopolistic position or prevention of media pluralism, given the multitude of printing options. Some panelists pointed to a lack of quality printing as an ongoing problem.

Channels of media distribution are free of state control and obstruction, and a number of broadcasting distributors operate in different parts of BiH. The increased penetration of IPTV in recent years gives citizens more choices, as well. There have been a few reports of violations of distribution regulations, but they are rare and no such cases were registered this past year.

The possibility of future concentration in broadcasting distribution raised some concerns among the panelists. The broadcasting distributor Telemach (a part of United Group, which also includes Telemach of Slovenia, SBB from Serbia, and Total TV) is interested in buying several cable distributors in BiH (BHB cable, HS, M&H Company, Velnet and Vrbas Cable Television Network). Such a buyout might lead to a monopolistic position. The Competition Council is now in the process of evaluating whether the case involves violation of the competition law. Given that United Group also owns the new regional N1 news channel, questions may arise on whether competing channels could be excluded from its offer.

Distribution, especially in the print media sector, is limited by ethnic fragmentation of readership. Distribution channels are owned privately. Čengić indicated that she witnessed

²² See, for example, Izvještaj o stanju medijskih sloboda u BiH u 2011. godini (Report on the State of Media Freedom in BiH in 2011). Sarajevo: Press Council /Association "BH Journalists," 2012.

some problems in timeliness of magazine distribution across entity lines, but no intentional obstruction has been reported.

Two telecommunication companies, BH Telecom and HT Eronet, are state-owned, while Serbian Telecom owns Telekom Srpske. In the past, reports have cropped up on some telecommunication companies' monopolistic behavior, but the panelists expressed no similar accusations this year.

Constant improvements of ICT infrastructure are keeping up with the needs of the media industry. Internet penetration is increasing rapidly, with broadband Internet reaching larger territories, including rural areas. BiH has four IPTV providers, with one distributing through the mobile phone network. Providers increasingly offer Internet, television, phone, and IPTV packages, giving citizens more options than ever before.

However, continuous politicization in the broadcasting sector, along with an unwillingness to enable progress toward the digital switchover, caused the score for ICT infrastructure to drop since last year. The digitalization strategy was enacted more than five years ago, and an action plan was prepared in 2012, but it has not been adopted to date. The government has purchased equipment for PSBs' digital transmission, but it was not installed at all three PSBs in 2014. The deadline for switchover to digital broadcasting, set by the International Telecommunication Union for June 17, 2015, will most likely not be met. Beyond that date, broadcasters will not be given an opportunity for uninterrupted and quality broadcasting.

List of Panel Participants

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The following panelists submitted a questionnaire but were unable to attend the panel discussion:

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