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MONITORING AND EVALUATION SUPPORT ACTIVITY (MEASURE-BiH)

ASSESSMENT OF THE MEDIA SECTOR IN BOSNIA AND HERZEGOVINA

FINAL REPORT

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EXECUTIVE SUMMARY

Assessment Purpose and Key Assessment Questions: The purpose of this assessment is to compile a general portrait of the media landscape in Bosnia and Herzegovina (BiH) in order to determine the broad status of reforms and needs in the media sector and make recommendations for potential further USAID involvement in the sector. The assessment team addressed the following three main questions:

- Question 1. What areas of the BiH media sector require the most urgent assistance that can be provided in the next five years?
- Question 2. What types of assistance might be the most effective in those areas, and on what scale?
- Question 3. What are the comparative advantages of US assistance to media outlets?

Methodology: The team combined qualitative and quantitative methods to collect and analyze data. The team's methods included conducting semi-structured interviews with 50 Key Informants (KIs) as primary sources, in Sarajevo, Banja Luka and Mostar, and analyzing key legal documents and reports on the state of the media sector in BiH. Based on research findings, the team systematized findings around four main problems related to the BiH media sector, and devised two recommendations for immediate USAID media assistance.

Main Findings / Problems: After the team combined desk research and the findings from key informant interviews (KIs), the team categorized the problems facing the BiH media into four main areas:

Problem 1: Political Instrumentalization of Media: The absence of boundaries between the media, political and business sectors in BiH has enabled political interests to capture the media sector. Media ownership is not transparent; accordingly, it is impossible to identify and document the extent of media capture by political parties and economic interests. Data on different levels of government/public sector spending on media are often hidden within general budgets or are publicly inaccessible. In addition to direct subsidies, public sector's spending includes advertising by government agencies and state-owned enterprises (SOEs). KIs explained that public broadcasters have been colonized by political parties and have no journalistic independence. The Communications Regulatory Agency (CRA), once a strong actor in establishing the integrity of broadcast media and defending the public interest, has been sidelined by political pressure. Nearly all KIs reported that political patronage, corruption, and nepotism dominate the media market.

Problem 2: Opaque Media Market: The free market is unable to foster the development of the media sector in BiH, according to KIs, due to the prevalence of corruption, nepotism and political patronage in media, all of which are exacerbated by the poor macroeconomic environment. There are no reliable data on advertising revenues and no reliable TV ratings, as the regulatory system is widely perceived as not being objective and favoring media and advertising agencies that have close relations with political parties or economic interests. There is no political will to change or clean up the system. As a result, advertising revenues reward political patronage not popular programming. Media do not operate according to rational business models. Due to the preponderance of non-economic forces shaping the BiH media market, media organizations mostly seek funding only to survive and have no capacity to invest in content and raise professional standards.

Problem 3: Poor Professional Development: Media industry KIs say that the professional level of BiH journalism is along the lowest in the region in terms of both media products and individual journalists, with a very few notable exemptions. KIs identified the main causes as the lack of skilled media managers, editors, and journalists and the lack of financial sustainability needed for independent and professional

reporting. Media organizations in BiH were isolated and weakened by war, poverty and corruption, and, as a result, now lack a culture of innovation. Supporting institutions, such as professional associations, state regulators and trade unions, are debilitated by poor economic conditions, uncertain funding and corrupting political pressures. Media products are commonly stolen and used by competitors without sourcing, attribution, or compensation, due to the lack of respect for intellectual property and the weakness of rule of law. Equipment is outdated and training opportunities are minimal.

Problem 4: Lack of Media Literacy: The general public in BiH lacks a basic understanding of how to understand and engage with media. In part, the public is apathetic to public affairs in general. Public education does not address media literacy. BiH's journalists perceive their readers/viewers as mostly lacking the basic tools to view media skeptically. In the words of one informant, "[T]here are two kinds of average Joe in BiH - one believes everything he reads in the newspaper, the other believes nothing."

Recommendations for Immediate USAID Assistance

After examining the evidence, the assessment team identified the four major types of media problems, applied the analytical framework and concluded that immediate USAID assistance would be most effective to address Problem 3 - Poor Professional Development based on the following criteria:

1. interventions should be made in the areas with the least resistance and the lowest political risks;
2. Interventions should build upon what stakeholders view as the comparative advantages of USAID interventions in the past – raising professional standards;
3. Interventions should produce immediate results; and
4. Interventions should focus on addressing core-underlying issues related to quality of journalism: even if the problems related to the external environment are fixed, without journalists' capacities being strengthened, changes will not be sustainable.

The team devised two recommendations for immediate USAID media assistance.

Recommendation 1: Direct support for existing media with a proven record of producing high quality and independent journalism

USAID should provide assistance to support media organizations that already are known to produce high quality and independent journalism to have the highest impact at a low risk. Because the actors and their products are few in number and are already known (many already have a track record as USAID beneficiaries such as Zurnal, CIN, Buka, etc.), such intervention most likely will result in these organizations producing high-quality journalism. **Advantages:** There is minimal administration since the organizations are already operational and known to USAID, support would simply enable them to continue their current activities. This support also would help to secure a pluralism of media voices and build upon the limited gains in independent media already made. These media should be directly funded with minimal restrictions on their activities. Operational budgets should cover as wide a variety of tasks as possible to facilitate innovation and organizational development, so that journalists can produce stories that take unexpected directions, if needed. **Risks:** Unrestricted funding might yield less ambitious results. By freeing media organizations from the burdens of struggling for survival and commitments to specific programs, USAID assistance might free up their capacities and foster innovation and independence, yet at the same of time the lack of financial pressure might reduce the media organizations' motivation to reach new audiences and produce better journalism. The best way for USAID to mitigate these risks without stifling beneficiaries' innovation or preventing their usage of funds for unanticipated needs will be for USAID to push for new media ideas and progress toward increased professionalism through annual monitoring.

Recommendations 2: Supporting the professional development of individual journalists, media organizations and the production of high-quality news through a training and production hub

USAID should support a training and production hub to develop the professionalism in BiH media by introducing new ideas, know how, good practices, modern equipment, and resources to existing media organizations as well as train young journalists and local editors. USAID might provide the support in the form of a physical training hub, created as a standalone organization, or hosted within an existing media organization.

This comprehensive approach potentially will facilitate the following five components:

- A production hub to facilitate technical training and content production for staff journalists, freelancers and journalism students;
- Support for video news production with online distribution via web and mobile devices;
- An independent editorial advisory body to increase the professionalism of daily reporting and investigative journalism;
- Small grants for story-production for individual journalists including an online distribution platform; and
- Media hub trainer(s) embedded in a BiH news organization, for on-the-job organizational capacity building.

The first four components of a potential intervention of creating a training and production hub are complementary. They would jointly foster the professional development of individual journalists by increasing capacities of journalists through high-quality practical training, providing editorial services, and small grant program, while at the same time securing a distribution for resulting high-quality stories channel (which was missing in previous interventions) through news production and development of online video channels. The fifth component would further the development of BiH journalism at an organizational level by providing high-quality training and on-the-job organizational capacity building for existing BiH new organization(s).

Create a media hub to foster the professional development of individual journalists and the production of high-quality news

A media hub would be established as a physical space for training and production. A small team led by a highly qualified journalist who has experience in international reporting, management, and training would implement the intervention. The hub would provide training, editorial oversight, and mentoring to individual journalists and media organizations as well as have the necessary production equipment available. **Advantages:** A fresh and concentrated injection of ideas, energy, resources and best practices likely will generate lasting high-quality standards in BiH media. According to the majority of KIs, training is most successful when journalists are able to employ their new skills, knowledge, and experience practically to produce stories in a real newsroom environment for public consumption on a regular basis. The lack of resources and overstretched personnel at media organizations drastically limits the opportunities for professional improvement of BiH journalists. **Risks:** Many media development projects are run professionally by project managers, who often do not have practical experience in producing excellent journalism and thus do not know what type of assistance to provide and how. Thus, a journalist who is highly qualified and has significant international experience should lead the proposed hub.

Support the development of online video news

The media hub also could support the production of video news for distribution online and via mobile devices. The aim is to improve the quality, scope and technical capacities of TV journalists creating a relatively new form of product. The hub could work to create a new internet TV channel or work with one or several existing media, which already produce video stories such as Zurnal, Buka and Source.ba.

Advantages: Online video is very popular in BiH and none of BiH's media organizations specializes in producing video news for web and mobile devices. Now is a very opportune moment to establish a brand and create the standards of the young industry. Online media are also inexpensive relative to television.

Risks: Regardless of the popular, flashy and trendy format, even online video news without high-level journalistic guidance will be doomed to mediocrity. However, as this component is proposed in conjecture with other components that will work on capacity building and increasing quality of journalism, this risk is minimal. After three to five years, informants say that such an activity certainly would influence the BiH's media landscape and inspire others.

Editorial Advisory board

The media hub could facilitate an editorial advisory group to provide editorial mentorship to selected journalists. The body could be made up of experienced and independent editors and journalists.

Advantages: A one-stop editorial advisory would encourage high journalistic standards and creative new approaches to story-telling and attracting new audiences. Editorial advisors who offer readily available expertise could invest heavily in early career journalists who need more help and focus less on more experienced journalists who might need only occasional advice on concrete matters such as a technical question, support for a specific story expense or an edit. **Risks:** Risk of choosing the wrong board members could be minimized by performing due diligence, choosing foreign editorial advisers, and by spelling out the broad strategic duties and obligations of the advisory body to enable the members to maintain independence while preventing the production of mediocre journalism.

Small grants program for story-production and online platform for distribution of stories

The media hub could create a small grants program for story-production and an online platform to distribute the stories to a variety of media. The media hub could launch a website that will play an important role as an online archive of stories available to other media outlets for republishing or rebroadcasting. It also would enable BiH media to find stories for publication on topics that routinely do not receive much coverage - such as local news. **Advantages:** The intervention would help both freelance journalists and staff journalists who otherwise are unable to spend time and resources reporting a story. The hub would provide grants to journalists for story-reporting expenses such as travel and equipment, labor fees for freelancers and salary replacement for staff journalists. **Risks:** One problem of past small media grants programs from the Strengthening Independent Media (SIM) program was that stories that were produced with donor funding could not find an outlet for publication or broadcast. With its own dedicated website, such a program would ensure that each story produced by grantees would at least be published online. The editorial board should work actively with BiH media organizations to place stories at the beginning of the grant process to ensure that all stories reach maximum audiences.

Embed well-qualified trainer(s) from the media hub in a BiH news organization for on-the-job organizational capacity building

Experienced journalist trainer(s) with international experience from the media hub could be embedded (partially or fully) within an existing BiH media organization. The journalist trainer(s) should have significant editorial and managerial experience. They should work with editors, managers, and executives to facilitate sustainable personal and institutional development. The focus should be on developing the professional

journalism standards of the organization, increasing quality, attracting bright and creative young journalists and finding ways to attract new audiences. **Advantages:** The trainer(s) would be able to respond to the organizational needs of the partner media organizations in the most flexible way. Raising the standards to a high level would reverberate among other media organizations. **Risks:** The main risk is that the partner organization might lose its interest or will change. There should be no doubt that creating truly excellent journalism in BiH - by international standards - will be extremely difficult.

In both of our recommendations, assistance related to legal suits against journalists should be included, as the frequent suits are directly affecting professional independent journalism. This type of assistance could be provided in two ways: i) by supporting BiH Journalists' Free Media Help Line and/or ii) by establishing a fund within the hub which would be used for covering such expenses and offering high-quality legal aid (including by foreign lawyers if needed).

LIST OF ABBREVIATIONS

ATVBL – Alternative Television Banja Luka
BD – Brcko District
BHJ – Association BH Journalists
BHRT – BiH Radio Television
BiH – Bosnia and Herzegovina
BNTV – Bijeljina Television
CIN – Centre for Investigative Reporting
CRA – Communications Regulatory Agency of BiH
EU – European Union
FBiH – Federation of Bosnia and Herzegovina
FTV – Radio Television of FBiH
ICT – Information and Communication Technology
IREX – International Research and Exchanges Board
KII – Key Informant Interview
MC Online – Media Center Online
MCS – Media Center Sarajevo
ML – media literacy
MSI – Media Sustainability Index
NGO – Non-governmental Organization
OSCE – Organization for Security and Cooperation in Europe
PSB – Public System Broadcasting
PC – BiH Press Council
PEM – Private Electronic Media Association
PSB -- Public Service Broadcasting
RS – Republika Srpska
RTRS – Radio Television of Republika Srpska
SIM – Strengthening Independent Media Activity
SOE – State-Owned Enterprise
UMI – United Media Industry
US – United States
USAID – United States Agency for International Development

I. INTRODUCTION AND BACKGROUND

I.1 PURPOSE OF THE ASSESSMENT AND KEY ASSESSMENT QUESTIONS

This assessment meets two main objectives. The first is to determine the precise state of reforms and needs in the media sector in Bosnia and Herzegovina (BiH). USAID/BiH needs an updated and precise assessment of the current media landscape in BiH in light of the media sector's many significant needs, and the shifting international donor environment over the last 20 years. The second objective is to identify the needs of BiH media sector that can be most effectively met by USAID assistance and to make specific recommendations for potential future involvement. In this assessment, the team also incorporates the lessons learned from USAID's most recent media assistance in BiH: the five-year Strengthening Independent Media (SIM) activity that ended in 2015.

The assessment was designed to answer the following three questions:

- What areas of the BiH media sector require the most urgent assistance that can be provided in the next five years?
- What types of assistance might be the most effective in those areas, and on what scale?
- What are the comparative advantages of US assistance to media outlets?

I.2 MEDIA SECTOR BACKGROUND IN BOSNIA AND HERZEGOVINA

I.2.1 MEDIA LANDSCAPE OF BOSNIA AND HERZEGOVINA

The media in BiH reflects the deep divisions in the country. The decentralized state established by the Dayton Agreement in 1995 has solidified the fragmentation of the county along ethnic and territorial lines. In the 20 years since the end of the war, international actors have played a leading role in building peace, creating institutions and imposing democratic reforms, including establishing and supporting media organizations, legislation, and regulators.¹ The Public Broadcasting System includes BH Radio Television (BHRT) with national coverage, and two entity systems, Radio Television of FBiH (FTV) and Radio Television of Republika Srpska (RTRS). A number of local TV and radio stations are funded through municipal and cantonal budgets.

The country's main regulatory body for electronic media is the state Communications Regulatory Agency (CRA) established in 2001. The CRA, although designed as an independent body supported by intensive external media assistance, suffers from similar issues faced by other state-level institutions and agencies established under strong international pressures – political parties in power were failing to appoint its new director since 2008, while the Agency struggles to keep its political and financial independence. Only at the end of 2015 did the government appoint a new director. The appointment was widely perceived to be a purely political decision without regard for expertise or experience.

The main body for the self-regulation of print and online media is the Press Council of BiH, which was created in 2001. The number of complaints about Press Code violations to the Press Council increased

¹ Ahmetašević and Jusić, 2012: 15

from 7 in 2001 to 27 in 2004, 116 in 2009, 297 in 2014, 191 in 2015 and 172 in first 5 months of 2016,² indicating citizens' growing awareness of the Council's activities.

There are four professional associations for journalists in BiH, some of which are clearly demarcated by ethnic affiliation. The association BH Journalists has the largest membership from both entities - the Republika Srpska (RS) and the Federation of BiH (FBiH) - and the Brcko District. It is also the group which is most active on the issues of press freedom, journalist protection, and professional integrity.

The number of media organizations in BiH is high for a country as small and poor as BiH. According to data provided by the CRA (<http://www.rak.ba>) and Press Council (<http://www.vzs.ba>), BiH has 189 broadcast outlets (145 radio stations and 44 TV stations), 9 daily newspapers, 116 magazines (weekly, monthly, periodic), and eight news agencies. The number of online media organizations is not available.³

Internet penetration reaches 72.41 percent of the population, according to the CRA.⁴ The number of users has increased rapidly since 2002 (the earliest year for which data are available) when only 4 percent of the population had internet access.⁵ Smartphones are becoming one of the most important tools for internet access.⁶ Mobile phones are used by 91.12 percent of the population, which is a significant increase from 2006 when only 48.7% percent used mobile phones.⁷ The most used form of Internet connection in 2014 was xDSL in comparison to Wi-Fi, cable and mobile internet 3G.⁸

Socio-economic status of journalists. Data about the numbers of journalists working in BiH media are based on estimates that vary by sources. According to estimates by journalists' associations, there are between 2,000 and 3,500 journalist.⁹ According to the data from the association BH Journalists, the total number of journalists employed by BiH media range from 1,574 to 2,755. There are 625 unemployed journalists (according to the Employment Agencies of the FBiH: <http://www.fzzz.ba> and the RS: <http://www.zzrs.org>).¹⁰ According to a study by the South-East European Partnership for Media Development, journalists in BiH are among the lowest paid holders of university degrees along with teachers and architects: their pay averages 680 KM (€340), compared to the average overall salaries of 829 KM (€424) for BiH citizens.¹¹ Salaries for journalists at the public broadcasting services in Sarajevo – BHRT and RTV FBiH – average around 1,000 KM (€511). Journalists at RTV FBiH have salaries ranging from 600 KM (307 €) to 3,000 (€1,530).¹² Salaries can vary greatly between media outlets and even within

² "Kratak pregled žalbi po godinama," Press Council web site: http://vzs.ba/index.php?option=com_content&view=article&id=193:pregled-sluajeva-2001-2009-godina-123-kb&catid=22:kratak-pregled-albi-po-godinama&Itemid=23 (accessed 10 July, 2016).

³ The Press Council formerly listed web portals on their web site. However, since many web portals simply do not join the Press Council or they launch and close operations in a short period of time, these data were seen as incomplete and they were withdrawn.

⁴ "Izveštaj o rezultatima godišnje ankete korisnika dozvola za pružanje internet usluga u BiH za 2015.

godinu" <http://www.rak.ba> and: <http://faktor.ba/brojka-koja-neiznenaduje-saznajte-koliko-ljudi-u-bih-koristi-internet/>

⁵ Turčilo L. (2006), *Online mediji i offline politika u BiH*. Sarajevo: Internews

⁶ Web site of the CRA: <http://www.rak.ba>, (accessed on June 20, 2016)

⁷ Ibid.

⁸ No data available provided by CRA yet for 2015.

⁹ Report "Employment Condition of Journalists in Albania, BiH, FYROM, Montenegro and Serbia," South-East European Partnership for Media Development, March 2015.

¹⁰ More on this in Turčilo L. Masnica S. „Izazovi obrazovanja novinara u BiH: zašto nam je potrebna promjena pristupa“ u Car V, Matović M i Turčilo L. (2015) *Mediji i javni interes*. Zagreb: Fakultet političkih znanost https://www.academia.edu/25544879/MEDIJI_I_JAVNI_INTERES

¹¹ Report "Employment Condition of Journalists in Albania, BiH, FYROM, Montenegro and Serbia," South-East European Partnership for Media Development, March 2015.

¹² Ibid.

the same media outlet. Big private media outlets can pay thousands of KM or nothing at all, as in the case of entry-level journalists. Al Jazeera in Sarajevo pays the highest salaries of all.¹³

Legal framework and regulation of the media sector. The Constitution (adopted as an annex of the Dayton Agreement in 1995) guarantees freedom of expression and freedom of the media. The Law on Protection from Defamation (Official Gazette RS No. 37/01, Official Gazette FBiH No. 31/01) decriminalizes defamation and libel. The Parliament Assembly of BiH in 2000 adopted the Freedom of Access to Information Act or FOIA, making BiH the first country in the Balkan region to do so.¹⁴ In 2001, both FBiH and Republika Srpska (RS) adopted the FOIA law. The law regulates the access to information held by public authorities, stating that the right to access this information is essential to the democratic process and that every natural and legal person has a right to access this information. The Law on Communications (Official Gazette BiH No. 31/03, 12 November 2002) constitutes the broadcasting framework in BiH. The CRA adopted several acts to align the laws regulating the broadcasting sector to the European framework. The following laws regulate the Public Service Broadcasting system (PSB) in BiH:

- The Law on the Public Service Broadcasting System in BiH (or System Law 2005)¹⁵ which regulates the structure and guiding principles of public broadcasters and relations between them;
- The Law on the Public Service Broadcasting of BiH (or BHT Law 2005)¹⁶ which regulates the public broadcaster at the state level – BHT;
- The Law on the Public Service Broadcasting of RS (or RTRS Law 2006)¹⁷ which regulates the public broadcaster of RS– RTRS; and
- The Law on the Public Service Broadcasting of FBiH, which regulates the public broadcaster of the entity of the FBiH¹⁸ (adopted in 2008).

The Code on Audiovisual Media Services and Media Service of Radio, launched in 2011, established new guidelines to regulate the content in the audiovisual media. Most analysts agree that legislation in BiH is largely sound and effectively establishes a legal framework in which the media can operate freely and in the public interest. Sound as they are, the laws are poorly implemented.¹⁹ Moreover, there are no laws regulating the transparency of media ownership and the advertising market. Other key media problems are caused by weak institutions, according to participants in the Balkan Media Barometer and our KIIs.²⁰ Institutional weaknesses resulted in failure to implement the digitalization of television in BiH (the legally mandated deadline passed on June 17, 2015), the dysfunctionality of the PSB and political pressures on the CRA.

Education for journalists. Several models of formal and informal journalistic education have been implemented in BiH. Models include: complementary formal and informal education, such as the University

¹³ Ibid.

¹⁴ The FOIA on the state level was amended two times in 2006 and 2009. The FOIA was first amended to enable stronger legal protections within the framework of the administrative law of BiH. It was amended for a second time to impose legal penalties for prescribed violations.

¹⁵ Law on Public Radio-Television System of B-H (Sarajevo, October 2005), Official Gazette of BiH 78/05, entered into force 8 November 2005.

¹⁶ Law on Public Radio-Television Service of B-H (Sarajevo, December 2005), Official Gazette of BiH 92/05, entered into force 28 December 2005.

¹⁷ Law on Public Radio-Television Service of RS (Banja Luka, May 2006), Official Gazette of RS 49/06, entered into force 11 May 2006.

¹⁸ Law on Public Radio-Television Service of FBiH (Sarajevo, July 2008), Official Gazette of FBiH 48/08 entered into force 6 August 2008.

¹⁹ Halilović and Džihana 2012

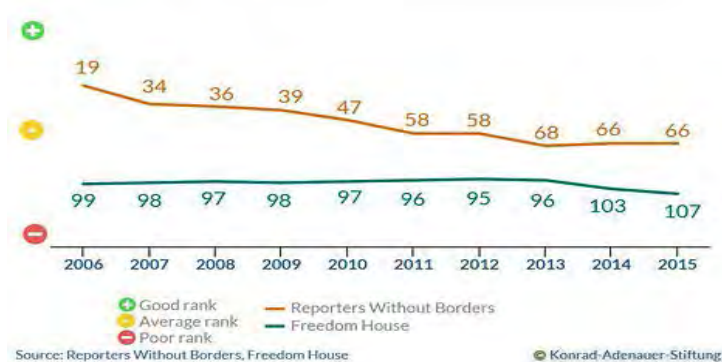
²⁰ Balkan Media Barometer 2014: <http://library.fes.de/pdf-files/bueros/sarajevo/11100.pdf> accessed on June 17 2016.

of Sarajevo Journalism Department and Media Plan School of Journalism, or the BBC School of Journalism²¹ as well as interventions implemented and financed by international donors that teaches practical journalism skills to improve the future prospects of young journalists. Currently, 11 universities offer journalism programs: six in the FBiH and five in the RS. Seven are public and four are private universities. Most of the programs are organized as 3+2+3 (3 years = BA; +2 years = MA; +3 years = PhD). Only two have the model 4+1+3. Journalism departments at public universities lack practical training opportunities for students and instead offer a predominantly theoretical approach to journalism. Private universities tend to lack qualified teaching staff and have a weak tradition of teaching.²² The Mediacyenter²³ and Media Plan Institute²⁴ offer short training courses for journalistic skills. BH Journalists organizes a summer school for journalism students (Novinarska akademija²⁵). The Press Council organizes a School of Media Ethics for journalism students and young journalists.²⁶

Under the SIM activity, USAID provided funding to train more than 200 journalists through the Media Center Sarajevo. Journalists received training on new media technologies, online media newsroom, crowdfunding, and mobile driven reporting. More than 50 interns received 3-week trainings mainly on digital media. USAID also funded professional associations such as BH Journalists and the Press Council to provide trainings.

The State of Press Freedom and Media Professionalism. International organizations found that efforts to protect media freedoms in BiH are largely stagnate. BiH demonstrated significant deficits with respect to protections for media freedom. According to the 2016 World Press Freedom Index, BiH was ranked 66 out of 180 countries, a decline of 2 points since the previous year.²⁷ BiH's score in the latest Reporters without Borders Freedom of the Press Index (seen below in Table 2) shows no improvement. Freedom House similarly views the media situation in the country as "partly free."²⁸

Table 1. World Press Freedom Rankings of Bosnia and Herzegovina (2006 - 2015)



Source: <http://www.kas.de/wf/en/71.13562/visited> June 18, 2016

²¹ More on this in Turčilo L. „Ne/educiranost novinara i ne/vjerodostojnost medija u postratnoj i posttranzicijskoj BiH“ in Veljanovski R. (ed) (2011). Verodostojnost medija – dometi medijske tranzicije. Beograd: Čigoja

²² More on this in Turčilo L. Masnica S. „Izazovi obrazovanja novinara u BiH: zašto nam je potrebna promjena pristupa“ u Car V, Matović M i Turčilo L. (2015) Mediji i javni interes. Zagreb: Fakultet političkih znanost

https://www.academia.edu/25544879/MEDIJI_I_JAVNI_INTERES

²³ <http://www.media.ba>

²⁴ <http://www.mediaplan.ba>

²⁵ <http://www.bhnovinari.ba>

²⁶ <http://www.vzs.ba>

²⁷ <https://index.rsrf.org/#!/index-details/BIH>

²⁸ https://freedomhouse.org/sites/default/files/FreedomofthePress_2015_FINAL.pdf visited on June 17 2016.

As seen in Table 2, the IREX Media Sustainability Index 2016 for BiH indicated that there have been almost no positive developments in recent years, indicating that BiH media landscape is under heavy political influence, reporting is biased, and that media laws are poorly implemented. The country’s media system is considered to be “an unsustainable mixed system.”²⁹ Similarly, freedom of speech declined over the previous year due to threats to journalists, poor implementation of laws and political and economic instability.

Table 2: IREX Media Sustainability Index for BiH (2010 - 2016)

| Indicator | Year | | | | | | |
|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
| Free Speech | 2.96 | 2.54 | 2.45 | 2.38 | 2.36 | 2.56 | 2.46 |
| Professional Journalism | 2.12 | 1.87 | 1.68 | 1.60 | 1.83 | 1.77 | 1.67 |
| Plurality of news sources | 2.77 | 2.59 | 2.16 | 2.20 | 2.26 | 2.23 | 2.20 |
| Business Management | 2.43 | 1.84 | 1.61 | 1.60 | 1.64 | 1.58 | 1.39 |
| Supporting institutions | 2.71 | 2.27 | 1.95 | 2.35 | 2.12 | 2.02 | 2.15 |
| Overall score | 2.60 | 2.22 | 1.97 | 2.03 | 2.04 | 2.03 | 1.97 |

Source: IREX, Media Sustainability Index.

According to the 2016 MSI report, the score for professional journalism was the second-lowest score among all objectives and below the overall country score. Scores for this goal tracked the trend of journalism’s declining quality since 2009 with an exception for 2014 when the score modestly improved. Members of the panel organized by IREX pointed to heavy political partisanship in previous years, especially before and after elections in 2010, which resulted in biased reporting and violations of journalistic norms (MSI, 2011; MSI, 2012). They also identified different factors that contributed to this trend such as politicization and commercialization of media content, lack of respect of professional standards in online media, and the poor socio-economic situation of journalists.

Scores for the plurality of news sources did not change significantly since the 2012 report, when it dropped significantly (from 2.59 to 2.16); the scores remained static in 2013 and 2014. The main reasons for the decrease, according to the MSI is that indicator 7 (the media covers a broad spectrum of social interests) showed the greatest decline and Indicator 3 (state or public media reflect the views of the political spectrum, are non-partisan and serve public interest) also received a lower score. Panelists explained the drop by underlining “the lack of multiple viewpoints, the biased editorial policies, the shortage of news-

²⁹ IREX’s Media Sustainability Index (MSI) provides in-depth analyses of the conditions for independent media in 80 countries across the world. As part of the methodology, in each country a panel is organized consisting of prominent media related persons to evaluate the state of media in their respective countries. Panelists are directed to score each indicator from 0 to 4, using whole or half points where 0 relates to the fact that country does not meet the indicator; while 4 is granted when country meets all aspects of indicator. The average scores of all the indicators are averaged to obtain a single, overall score for each objective. “Unsustainable Mixed System” (scores between 1–2) means that a “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”.

oriented programming, and the failure to cover minority issues” (MSI, 2012). Coverage of minorities (Indicator 7) remained the lowest-rated indicator in the previous years (MSI, 2015; MSI, 2016).

BiH’s scores also fell in terms of business management, which remained the weakest dimension of media sustainability, suffering a decline of 1.04 in the MSI score from 2010 to 2016. This same dimension of media sustainability demonstrated strong growth from 2004 to 2009 (from 2.31 to 2.82). MSI panelists, year after year, highlighted the main causes as dire financial circumstances in the media market, the oversaturation of the media market, flawed fiscal policy, a lack of managerial competence of people heading local media, and a lack of advertising investments by local companies. All of these factors kept most media on the edge of survival; only a few larger media outlets are truly self-sustaining enterprises.

The score for supporting institutions in 2015 (2.02) fell dramatically from the 2010 score of 2.71 but improved slightly (2.12) in 2016. According to the report, “much of the decline came from indicator 1 (trade associations), indicator 2 (professional associations), indicator 4 (academic journalism programs) and indicator 5 (short-term training)” (MSI, 2011-2016). Professional organizations remain fragmented and fragmentation remains the main marker of professional organization in media sector. For example, in 2016, there were four registered journalist associations. Over the years, panelists mentioned BH Journalists as the most active association, with a membership across ethnic and territorial lines. When it comes to education, the overall impression is that formal education does not ensure sufficient general knowledge or practical journalistic skills (MSI, 2015). The BiH media sector still does not use the advent of new technologies and digitalization to modernize production and BiH is not in line with popular trends when it comes to media consumption.

I.2.2 MEDIA ASSISTANCE IN BOSNIA AND HERZEGOVINA

BiH is an extraordinary example of intensive assistance efforts by international donors to create a friendly environment for media.³⁰ An estimated €87 million were disbursed by all international donors - private foundations, NGOs and foreign governments - from 1996 until 2006,³¹ and by 2013, that number was probably over €100 million.³² USAID alone invested more than 40 million USD between 1996 and 2013³³ while the European Commission spent over €20 million from 1996 to 2002 on media assistance in BiH.³⁴ The Open Society Fund BiH disbursed over 9 million USD from 1993 to 2009 on media programs.³⁵

The team’s analysis of these media assistance efforts shows four distinct phases:

The first phase (1996-1998) was characterized by a focus on pacifying the media discourse and encouraging pluralism in the media sector, eliminating outright ethnically-oriented hate speech and opening up the media space to alternative sources of information. The first phase also sought to give a platform to moderate voices and to create the basic preconditions for free and fair elections.³⁶ In 1996, the international community established the Media Expert Commission, mandated to observe media coverage of elections, as well as two country-wide, trans-ethnic broadcasters—the Free Elections Radio Network

³⁰ The most recent and comprehensive study on media assistance in BiH has been produced by Jusić and Ahmetašević

³¹ Rhodes, Ten Years of Media Support to the Balkans – An Assessment, p. 15

³² See European Commission, Mapping EU Media Support 2000-2010 (European Commission, September, 2012), p. 6

³³ Jusić and Ahmetašević, pp. 18; Johnson, “Model Interventions,” pp. 102-103; Democracy International, Bosnia-Herzegovina Democracy and Governance Assessment (Bethesda: Democracy International, Inc., May 2007), pp. 17-18; UNDP, Supporting Public Service Broadcasting, p. 20

³⁴ Dan De Luce, Assessment of USAID Media Assistance in Bosnia and Herzegovina, 1996–2002: PPC Evaluation Working Paper No. 6 (Bureau for Policy and Program Coordination, USAID, September 2003), pp. V, 10

³⁵ Official data from Open Society Fund Bosnia and Herzegovina; Jusić and Ahmetašević, pp. 18

³⁶ Hozić, “Democratizing Media, Welcoming Big Brother,” p. 149; Riley, “Painstaking Efforts - OHR Media Development Strategy In Post-Dayton BiH,” p. 2; UNDP, Supporting Public Service Broadcasting, pp. 16-17

(FERN) and the Open Broadcast Network (OBN). However, donors did not coordinate the implementation of these projects; donors and international actors deployed their own respective strategies. Accordingly, the initiatives lacked a strategic approach. Media assistance activities were perceived as “reactive, contingent upon on-the-ground developments, rather than based on proactive or coherent strategies.”³⁷

The second phase (1998 – 2002) was marked by structural reforms intended to create a legal and regulatory framework and empower important media institutions such as the public broadcasting system.³⁸ In this phase, donors had a strategic approach in conjunction with the extensive use of OHR powers. International actors coordinated and imposed the drafting of key media legislation. The OHR also required governments to adopt Freedom of Information Acts (FOIA), and imposed the Law on Communications in 2002 that created the legal foundation to regulate the broadcasting and telecommunications sectors. In 1998, the OHR established the Independent Media Commission (IMC), a regulatory body that later became the CRA. Another important result of media assistance was the creation of the Press Council, a self-regulating body.³⁹

The third phase (2002 - 2008) was characterized by a gradual decrease of direct international involvement in media reforms and local actors assumed more significant roles. Management of the CRA fully transferred into local hands, while local political leaders, whom the EU supervised externally, assumed responsibility for PBS reform. The OHR stopped intervening in media legislation. This was coupled with a gradual decrease in donor funds and ambitions and a shift in donors’ priorities toward other geographic regions. The interventionist approach of the first two phases was replaced by conditionality mechanisms linked to EU accession.

The fourth phase (2010 - present) has marked the return of important donors, such as USAID, and continuous, but limited, efforts by the EU to foster reforms in the BiH media sector, following two years of donors’ inactivity. With the retreat of the OHR and reduced donor money, the situation in the media sector deteriorated, especially after 2008. This deterioration in the media sector was exacerbated by the economic crisis, which began in 2009, and which further reduced spending on advertising. Media outlets that benefited from donor support became much like other commercial media captured by local political and economic actors. This was the period in which USAID executed its SIM activity, implemented by Internews from 2010 to 2015.

In their study on media assistance in BiH Jusić and Ahmetašević (2013) detected the following shortcomings of external assistance:

- Strategic rigor is one of the key preconditions for sustainable reforms. If donors pull back from reforms too early, the achieved results will evaporate.
- Models to be imported should be tailored locally. Some of the western models that were used as blueprints for institutional reforms were not designed for the local setting. Local context, experiences and expertise should be taken into account while designing models to develop local institutions.
- Dependence on donors and the importance of the financial sustainability of recipient media outlets and institutions. To achieve sustainability, public and private media institutions need sufficient time to conceive and implement robust financing models that account for unpredictable political and economic conditions.

³⁷ Jusić and Ahmetašević, pp. 22

³⁸ Riley, “Painstaking Efforts - OHR Media Development Strategy In Post-Dayton BiH,” pp. 4-5

³⁹ Chemonics, Giving Citizens a Voice - Strengthening Independent Media in Bosnia and Herzegovina: Final Report (Chemonics International Inc., 2006), p. 21

- Need to engage local actors. Enduring institutional changes occurred in cases in which local elites welcomed external assistance. At the same time, radical institutional changes, which significantly affected the political elite, were less certain to succeed than incremental institutional change.
- Lack of local ownership over the reform process. International actors attempted to establish cooperation with local politicians and media with only limited success. Consequently, the reforms lacked a sense of ownership by local stakeholders. This translated into weaker support for the proposed solutions.
- Importance of continuous monitoring. Scholars emphasized the importance of international actors exerting pressure against recipient governments, through monitoring, criticism and even sanctions.
- Importance of donor coordination. Practitioners and politicians cited the lack of donor cooperation and coordination as one of the main reasons for the ineffectiveness of donors' media programs and initiatives.⁴⁰

The team learned following lessons from the SIM activity (2010 – 2015)⁴¹:

- Less is more: project descriptions and goals were too broad. SIM's program description was ill defined and overly ambitious given the resources available for the activity. Consequently, SIM's contribution to the high-level targeted results for the overall media sector was limited. The decision to focus SIM support in the second phase was reported to result in a better quality of impact on a narrower group of beneficiaries and more societal influence. Future interventions also should focus on the beneficiary level, as SIM did in the final years of its implementation.
- Effort needed to influence politics were underestimated. The SIM program description recognized the political challenge to the CRA's independence and sustainability and planned for diplomatic action in concert with its programmatic activities. However, the political environment during implementation was more challenging than USAID anticipated when it drafted the program description.⁴² The OSCE Working Group implemented diplomatic efforts; however, these efforts were not sufficient to achieve the results needed to support the CRA. As a result, USAID/BiH shifted support away from the CRA and media associations in 2012.
- The small grants program helped small media, increasing the plurality of voices and improving the quality of media. SIM's assistance improved the scope and quality of reporting, in particular human rights reporting, the expression of pluralism of thoughts and ideas, and technical innovations used by beneficiaries, including the introduction and improvement of media partners' online presence and data journalism.
- Improving online platforms is important for audience engagement. SIM's media support for fostering content development and new audience engagement tools improved readers' trust in online media beneficiaries. According to the online survey, users reported that online media were more interested in the opinions of their audiences and were less prone to self-censorship than traditional media.
- Support to investigative stories is essential, in particular focused support and innovative formats. Although portals that published SIM investigative stories did not reach as many online visitors as other news sites, these stories influenced public opinion regarding several important issues. However, investigative approach, investigative tools, research techniques, and finding broadcast or publishing channels for such stories require further investment and development.

⁴⁰Jusić and Ahmetašević (2012) 53-56, 58-59.

⁴¹ Barišić, M., Marko, D. and N. Bosankić, „Strengthening Independent Media in BiH,“ Performance Evaluation of USAID SIM Activity, February, 2016, Sarajevo: Measure BiH, available at: http://pdf.usaid.gov/pdf_docs/PA00M3BV.pdf (accessed on 19 June 2016).

⁴² SIM was implemented over a five-year period during which three elections took place: two General Elections (2010 and 2014), and one Local (2012). Permanent campaigning and stalemates in government formation, exclusivist ethnic or party interests prevented any substantive political reform and resulted in political crises and unstable governments.

- Tailored trainings for specific skills were more effective than broader educational programs. THE experience of the Mediacenter Sarajevo shows that journalists need specific trainings for practical skills on a daily basis, which they cannot get otherwise, to improve trainees' professional development.
- Sustainability support and business support was insufficient. Financial independence and sustainability are the key preconditions of independent journalism. SIM, however, did not envision business development support for media managers and owners. Small grants, while helpful, cannot alone ensure sustainability even over the mid-term period.

2. METHODOLOGY

2.1 DATA COLLECTION

The assessment team used a combination of qualitative and quantitative methods to collect data. The assessment team conducted interviews with key informants (KIs) as primary sources, and extracted data from various secondary sources, including existing reports, analysis, assessments, and so forth.

The team collected data in two phases – desk research and field research.

The team's desk research included an in-depth review. The team reviewed the key legal documents and reports on the state of the media in BiH from the last five years: MSI IREX reports (2010 – 2016); EU Progress Reports for BiH (2010 – 2015); Freedom House reports; OSCE Representative on Freedom of the Media documents; Council of Europe reports; MEASURE-BiH's SIM Evaluation Report published in February 2016; and analyses and studies by local academic, research and professional institutions such as the Communication Regulatory Agency, BH Journalists, Mediacenter Sarajevo, Media observatory, Analiziraj.ba, and others. A bibliography of all documents reviewed is provided in Section 9).

The team's fieldwork lasted two weeks, from May 30 to June 10, 2016. The team conducted KIIs and one focus group discussion (FGD). Within this period, the assessment team met with 50 individuals in total. Out of this number, 25 are from media organizations (1 print, 1 radio, 4 commercial televisions, 2 public broadcasters, and 17 online), 2 from the state communications regulator, 3 from academia, 3 from advertising agencies, 5 from international organizations, 5 from NGOs, and 7 are independent analysts. The team conducted KIIs in Sarajevo, Banja Luka, and Mostar.

2.2 DATA ANALYSIS

Taking into account the research questions and the purpose of this assessment, the analytical framework has been created to: (a) Detect the most important problems with which BiH media are struggling; and (b) Identify recommendations for immediate USAID assistance in BiH media sector.

(a) Rationale and criteria for selecting the four types of media problems. The team analyzed the results of desk research and matched the conclusions of existing reports with the findings we collected through KIIs. The team organized the many different types of problems of the BiH media, small and large, into four broad categories: Political Instrumentalization of Media, Opaque Media Market, Poor Professional Development, and Lack of Media Literacy. The first two are largely external types of problems, the third is directly media-related, and the last is related to the media audience.

(b) Identify recommendations for immediate USAID assistance. After the assessment examined the evidence and identified the four types of media problems, we concluded that

immediate USAID assistance will have the most impact if it addresses Problem 3 - Poor Professional Development. The first two types of problems - Political Instrumentalization of Media and Opaque Media Market - are problems that largely relate to the external environment and will be less effectively addressed by international donor involvement. The fourth problem, Lack of Media Literacy, is largely policy-oriented and requires more complex and long-term involvement. The assessment team concluded that the problem of poor professional development is the most urgent and that USAID intervention in this area will be the most effective based on the following criteria:

1. Interventions should be made in the areas with the least resistance and the lowest political risks;
2. Interventions should build upon what stakeholders view as the comparative advantages of USAID interventions in the past – raising professional standards;
3. Interventions should produce immediate results; and
4. Interventions should focus on addressing core-underlying issues related to quality of journalism: even if the problems related to the external environment are fixed, without journalists' capacities being strengthened, changes will not be sustainable.

3. PROBLEM 1: POLITICAL INSTRUMENTALIZATION OF MEDIA

No boundaries between media, politics and business. At first glance, it appeared to the team that there were enough (or even too many) media outlets to offer BiH citizens a pluralism of information and a diversity of viewpoints. However, KIs and academic research indicated that politically or economically powerful individuals or groups control most media, which directly influences reporting. This trend was seen most clearly during election campaigns, when “most outlets are divided along political, ethnic and territorial lines and remain under the strong influence of their owners and political patrons”.⁴³ Political and economic influences on media are very strong and media owners are very often in close relations with political and economic elites. Or, to put it in words of one KI: “owners do not strive for quality, editors do not try to be independent.” Many KIs expressed the opinion that media formerly supported by international organizations were not able to become self-sustaining after assistance ended, so they turned to “political sponsors” and became their megaphones. KIs reported that there are no completely independent media in BiH, since all depend on different types of funding (political, business, or donor). They recognized an important difference: political- and business-tied funding directly suppresses press freedom because politically uncomfortable reporting can result in a loss of funding. On the other hand, donor funding enables independence from such political or economic pressures but only during the funding cycle. Many donor-supported media still need to worry about finding new donors after the funding ends.

No transparency regarding media ownership. The team had difficulty finding precise information on media ownership. The process of finding the real names of media owners required the team to first consult the register of the CRA or Press Council to find the name of company that owned the media. The team could learn the names of the owners of the company only by going in person to the court to view the company register. Most KIs and analytical reports concluded that there are far too many media organizations in BiH for the market to support. BiH's media market is poorer than those of other countries in the region, such as Serbia and Croatia. Despite having no business plans or reliable revenue streams, many BiH media organizations manage to operate and survive. KIs concluded that such media are financed by political or business elites to help them achieve their political or economic goals. Such

⁴³ Assessment of Political Diversity in Media Reporting on General Elections 2014 in BiH <http://www.mediaplan.ba/docs/FinalReportEN.pdf> Visited on June 17, 2016.

“hidden” support is obvious, according to KIs, and indicated when media organizations manage to stay in business despite having no income from advertisers or donors. In addition, media monitoring during election time⁴⁴ has shown the direct support of certain media for specific political parties, which is a key indicator of misuse of media for political ends.

In some cases, media owners are oligarchs who own other profitable businesses. They are widely perceived to be primarily pushing their business interests through media outlets as opposed to being reliable and reputable source of information, such as the owner of the newspaper *Oslobođenje*. Some media owners hold elected office after they have formally transferred ownership to family members, such as the owner of *Dnevni Avaz*. Also, some media groups (including both print and online media) are funded through politically controlled money by certain political parties or interest lobbies (including business interests). For example, the newspapers *Glas Srpske* and *Nezavisne* in Banja Luka, or the online media *Faktor* and *Novi* from Sarajevo, are all widely perceived to belong to politically-connected business structures. *NAŠA TV* from Mostar is supported by 55 private entrepreneurs who are connected closely to the leading political party that represents Croats in BiH. In all of these cases, media are perceived as being used as tools to promote business and/or political goals. Furthermore, web portals do not identify their owners or staff, so that users have no idea who works in the newsroom, much less who owns it. The association *BH Journalists* is lobbying strongly for an obligatory register of media ownership that would help to make these relations between political, economic elites and media owners more visible and transparent⁴⁵. However, the lobbying effort is a long-term process that requires drafting new legislation and changing regulations and laws. *BH Journalists* reports that they expect new media laws ensuring transparency in media ownership and advertising will be enacted within three years at the latest.

No disclosures about media spending by governments/public sector. A large number of broadcasters are still owned and financed directly by municipal and cantonal governments: they have some advertising revenues, but most of their budget is covered by public money. In 2014 this number was estimated at 74: 12 TV stations and 62 radio stations (2014, *Media Integrity Matters*). In 2015 the number of these media was estimated at minimum of 70⁴⁶. While the amounts of support varies greatly, these media are placed in a position of direct dependence, given that they receive funds directly from public budgets and receive no guarantees of editorial autonomy. Among these broadcasters, *Television of Sarajevo Canton (TVSA)* receives the largest portion of revenues (around €2 million per year). Another estimate (by *Sanela Hodžić* in a *Flash Report on BiH*) said that approximately €7.5 to 10 million of public money is “invested” in media through advertising public notices and other forms of indirect support.⁴⁷ KIs did not see this money as spent to support public interest television, but rather to bribe the media for political comfort, securing positive stories about certain political parties and preventing media from writing critically about local governance. According to an investigative report by *Žurnal*, more than KM 12.5 million was invested in 47 local public media in the FBiH and more than KM 4 million was spent on local public media in the RS (23 media) in the years 2013 and 2014.⁴⁸

Although official data do not exist, all media stakeholders and experts agree that state, entity, cantonal and local governments comprise the biggest advertisers in the country, together with public companies

⁴⁴ *Ibid.*

⁴⁵ How these relations between politics, business and media jeopardize media freedom and why transparency of ownership is necessary is explained in more details in book L. Turčilo (2011), *Zaradi pa vladaj – politika, mediji, biznis u globalnom društvu i u BiH*. Sarajevo: Vlastita naklada.

⁴⁶ According to partial data from the following article (accessed on June 10, 2016): <http://www.zurnal.info/novost/19687/vlast-i-mediji-l-rasipanje-miliona-za-naklonost-gradonacelnika> this journalistic attempt to uncover how public money is spent on media and how much does not represent official data and is not complete. Rather, it helps provide some context and sense of scale.

⁴⁷ *Hodžić, S. Flash Report 6: Bosnia-Herzegovina*, there are, however, different amounts mentioned in different reports, since all of them are estimates due to the lack of transparency of public spendings on media

⁴⁸ <http://www.zurnal.info/novost/19687/vlast-i-mediji-l-rasipanje-miliona-za-naklonost-gradonacelnika> visited on June 10, 2016.

that also are controlled by political parties. Media organizations that publish stories that are critical of political parties, government officials at any level and/or individual politicians can easily lose advertising from government institutions that are controlled by the criticized political party, as well as advertising from the public companies that the party controls. Some KIs reported that this loss of advertising due to critical journalism was one of reasons that the magazine Slobodna Bosna did not survive according to some estimates, the magazine needed 10 pages of advertising to make the print version sustainable, the publication failed in a way similar to the Feral Tribune in Croatia.

PSB colonized by political parties. The team found that political parties influenced PSB in several ways. First, the entity and state parliaments directly choose the members of the PSB's Steering Board⁴⁹. KIs from public broadcasting reported that this is a major flaw in the system. Second, political parties are also able to influence the content broadcast by PSB, especially at the entity level, by appointing Steering Board members in the Parliament as result of political deals, and (in) directly influence the editorial policies by appointing politically suitable staff. Several KIs pointed out that RTRS has become almost a 'regime TV', by directly promoting the views of the dominant political party in RS. FTV was under the influence of the ruling parties in the FBiH, but this control is less visible than it is in the case of the entity broadcaster in RS. The political affiliations of both entity broadcasters have been noticed in external monitoring conducted in 2010⁵⁰ and 2014.⁵¹ The economic crisis of BHRT⁵² is largely a political problem, rather than purely an economic one, because for a long time there has been no political will to deal with the problems of public broadcasters, including the establishment of a PSB Corporation that should be in charge of technical aspects, the transmission network and process of digitalization. Informants said that the Corporation has not been formed because of the lack of will between parties to compromise. The same political stalemate has also prevented the BiH switchover to digital transmission, which most of Europe already has completed. There are public attacks against BHRT by some politicians, members of parliament, who openly promote a boycott of paying RTV license fees.⁵³ Many KIs agreed that PSB faces a major crisis and that resolving the crisis will be a long-term process requiring a new strategy.

Communications Regulatory Agency under political pressure. The CRA has been under strong political pressures for many years, which has diminished its role as a regulator significantly. Parliament influences the election of members of the CRA Council.⁵⁴ The general impression among KIs was that all procedures seem legal and fair on paper, but that many hidden negotiations determine the selection of the Council of the CRA and its director.⁵⁵ In general, CRA was one of the success stories of intervention by the international community in the media sphere in BiH. At the beginning of the post-war reconstruction, the CRA played a major role regulating and protecting media integrity in BiH. But with the expansion of political influences and the diminution of the CRA's regulatory role over the past several years, the agency has lost its authority as well as its reputation in society as a reliable and independent regulator. KIs identified the causes as the international community's withdrawal from BiH affairs and the stagnation and political stalemate between ethnically divided state institutions. "The CRA went from

⁴⁹ <http://www.osce.org/bs/fom/94108?download=true> accessed on June 13, 2016.

⁵⁰ <http://www.mediaplan.ba/docs/izbori2010en.pdf> accessed on June 10, 2016.

⁵¹ <http://www.mediaplan.ba/docs/FinalReportEN.pdf> accessed on June 10, 2016.

⁵² The very existence of PSBs in BiH has been put into question recently due to extreme financial hardship and an inability to agree on a functional funding model. Due to the lack of funding, state-level PSB BHRT announced that it will stop broadcasting programs from July 2016, highlighting the deep structural crisis of the PSB system in the country. BHRT Steering Board announced it will stop broadcasting program from July, 1, 2016, but this decision has been subsequently revoked.

⁵³ <http://www.slobodnaevropa.org/a/naplata-rtv-pretplate-u-skripcu-etnickih-podjela/26920599.html> accessed on June 17, 2016.

⁵⁴ Before a legal amendment in 2013, the CRA has authority to nominate potential members to the FBiH Parliament and National Assembly of RS, which would make the final decision on appointment. According to new changes, appointments are completely in the hands of the legislative bodies on entity levels, RS and FBiH, which effectively subjects the process to political agreements between ruling parties.

⁵⁵ This statement of KIs is the same as a conclusion made by media experts in Balkan Media Barometer 2014: <http://library.fes.de/pdf-files/bueros/sarajevo/11100.pdf> (accessed on June 17, 2016).

imposing principles to accepting deterioration of these principles,” said one KI. Participants in the Balkan Media Barometer 2014⁵⁶ gave the CRA a grade of 1.4 on a scale 1 to 5 for political independence. The CRA is financially sustainable, as it is finance from annual licensing fees and penalties imposed on broadcast media. However, budget management and planning of CRA through the State-level government budget (Budget of BiH Institutions) is such that the actual revenues from fees and penalties at year end are generally higher than CRA’s expenditures, while at the same time these annual surpluses not being allowed to be carried over to the following CRA budgets. KIs said that these funds should be used to finance media development. There have been some debates about the idea, but according to KIs there is no progress toward making it a reality.

Legal suits against journalists by politicians. KIs reported that public officials freely sue journalists for libel without any grounds as a means of reprisal or harassment to prevent critical coverage. Civil Rights Defenders, an NGO funded by the Swedish government, currently funds pro bono legal defense services and a telephone hotline for BiH journalists. BH Journalists reported that approximately 50 such suits are filed annually. The organization is organizing a lobbying campaign to introduce legislation to cap libel legal proceedings at one per year—they often last eight years—as well as to establish a legal defense fund for journalists. While lower courts tend to rule in favor of plaintiffs’, higher courts generally rule in the journalists’ favor, finding that no error or defamation occurred.

4. PROBLEM 2: OPAQUE MEDIA MARKET

No reliable data on advertising revenues. According to a compilation of estimates by different sources⁵⁷, the annual total spending on media advertising in BiH ranges from €35 to €50 million. Only a few KIs made a higher estimate of up to €80 million. The estimated breakdown by media type is approximately 70-80% for television, 10-15% for online media and 10-15% for print and outdoor advertising. Of the total funds for print and outdoor advertising, it is estimated that 65% goes through advertising agencies, 15% by direct negotiations with private companies and 15% through direct negotiations with public companies.

No reliable TV ratings. Most KIs from advertising agencies and private TV stations questioned the reliability of the current system of measuring TV ratings in BiH, provided by Audience Measurement (AM).⁵⁸ They expressed that their concerns were based upon three uncertainties. First, the ownership of the Audience Measurement company is unknown; KIs believed that AM is connected with specific commercial media in BiH.⁵⁹ Second, new rules introduced by the Institute of Metrology in BiH, in 2012, require that measurement equipment be certified in the state laboratory, which is perceived as favoring AM. Third, several KIs expressed concerns over the people meters, which are tools used to measure official ratings for analog television, and the ways in which the system is prone to manipulation due to the corrupted selection of reporting households. Even before AM entered BiH and Mareco Index Bosnia (MIB) was the sole official provider of television audience data, several commercial media questioned the reliability of the data provided.⁶⁰ MIB stopped providing its services in 2014 but lodged complaints about

⁵⁶ <http://library.fes.de/pdf-files/bueros/sarajevo/11100.pdf> accessed on June 17 2016.

⁵⁷ This estimation is based on data available from Media Sustainability Index on BiH, and interviews with key informants representing advertising and communication agencies, as well as media outlets.

⁵⁸ Audience Measurement started delivering people meter data in May 2013 with 450 households in Bosnia and Herzegovina.

⁵⁹ They also officially commented on concerns regarding their ownership structure after the publishing of a Media Integrity report. According to a written response sent to the author, the AM owner is an investment fund that is common for the Nielsen group system and the model of starting their operations in new markets. See in Hodžić, S. <http://mediaobservatory.net/radar/flash-report-5-bosnia-and-herzegovina>

⁶⁰ MSI Irex, 2012, 2013, 2014.

the AM before the Competition Council of BiH and Prosecutor's Office. As an alternative, advertising agencies and commercial television stations use data from cable operators (such as Telemach) and IPTV providers ("Moja TV" of BH Telecom,) considering them to be more reliable. When it comes to online media, most rely on data provided by Google analytics. A few organizations subscribe to commercial services that use Gemius Audience results.

Advertising revenues reward political patronage not popular programming. As perceived by the majority of KIIs, most of the money that is spent on media advertising is spent by politically affiliated organizations or controlled by people who are politically affiliated. When it comes to public companies, the biggest advertisers are public telecommunication companies such as BH Telecom and HT Mostar, which both are seen by the KIIs as closely tied to the ruling parties which choose members of the companies' steering boards and influence how they direct the companies' advertising budgets. Indirect political influence is more viable at local level—small- and medium-size companies are abstaining to advertise directly in certain, usually independent, media outlets to prevent negative consequences or political pressures. Separate from their influence on the editorial policies at certain media outlets, some advertising outlets establish their own media outlets, such as was the case with Radio Sarajevo. Public institutions and political parties often are very important sources of advertising revenues for media, especially during public projects and election campaigns. In the RS, government support to media distorts the market and compromises the independent status and operations of certain media outlets. In spite of the fact that information on the financing of media should be publicly available, according to the Freedom of Information Act, "the access to information is disabled in various ways, with some sources suggesting that access to information about financial issues has been especially restricted".⁶¹ Advertising practices of this type, mostly aligned with political and economic interests, distort the advertising market in the long-term. Exceptions are big banks in BiH, which have independent budgets and target all types of media, but mostly those with the highest ratings.

Media do not operate according to rational business models. Due to the uncertainties related to the media market, media generally do not base their operations on purely economic parameters. According to KIIs, very few media organizations have functional business models and are independent from politically controlled money and donor's support. The few organizations that do include the web portals: Klix, Bljesak, and Capital. Several media stakeholders noted that that many independent media outlets, as well as the public broadcasters, turned towards political patronage between 2010 and 2016 to survive. KIIs perceived that several newly established media projects are supported by political capital.⁶² Even distribution networks (mostly for print media) are under political influence. Public institutions (under direct party control) are the biggest subscribers to print media. Rational business models, including opportunities to sell video stories or custom trainings, as designed by CIN and the Mediacenter, hardly led these institutions to sustainable business models. As witnessed by several KIIs, even in direct marketing when media directly negotiate with private company advertisers, there is little cash and many advertisers prefer to pay in kind in goods and services. With no cash income, media organizations often receive compensation in goods and services which might be useful for media owners but do not enable the organizations to provide salaries to journalists. Media organizations generally seek funding to survive, and only a few use external financial support to invest in programs and content.

⁶¹ As S. Hodžić indicated in her reports, "In the course of Media Observatory research, the Government of Republika Srpska provided information about financing of the media in 2014 and 2015 upon our request, but in response to requests submitted in previous years did not provide information but instead advised researchers to find the data in the Official Gazette, which is a questionable practice, given that the Official Gazette is available only to subscribers and in a format that is not easily searchable". See Hodžić, S., "State media financial relations in BiH: Increasingly Dependent and Disciplined Media," Media Integrity Matters, 2016: pg. 4.

⁶² KIIs as examples mentioned Faktor from Sarajevo, NASA TV from Mostar, while several KIIs perceived Al Jazeera as being ethnically (pro-Bosniak) and political biased.

The advertising market is externally distorted. A variety of sources⁶³ described the problem of "spill-over" advertising in which advertising agencies in Serbia and Croatia sell BiH advertising space to their clients by packaging it through international and regional channels watched in BiH. BiH TV channels and local advertising agencies get only the crumbs as long as this type of advertising through cable operators remains unregulated. KIs from the CRA said it is not possible to regulate this under the current international and local legislation. Other KIs said that BiH's advertising agencies were doing the same thing, similarly distorting the markets in neighboring countries.

5. PROBLEM 3: POOR PROFESSIONAL DEVELOPMENT

No tradition of public interest journalism. Most of BiH journalists do not have the sense that they have a special social responsibility and that journalism as a profession plays an important role as the fourth estate. The reasons for this are historical, political, and social. Many journalists view freedom of speech as the freedom to not check facts. While there always have been pockets of journalists and media which embrace their role as watchdogs of the public interest and social progress, KIs said that social responsibility is not seen as an important feature of mainstream BiH newsroom culture. Because journalists do not see their work as means to improve their society, the stories they choose to cover tend towards the sensational, involving big names, celebrities, and gossip. Since mainstream media feel pressured to promote specific political and economic interests, they do not choose stories meant to effect positive change for society as a whole.

No encouragement of innovation. Perhaps the most essential prerequisites for Western-style professional journalism are a strong sense of curiosity and the desire to "afflict the comfortable and comfort the afflicted." Media manager informants were divided as to whether journalists only can be born with such deeply personal qualities, like empathy, or whether these traits can be taught. Other KIs attributed motivation to a character quality in between nature and nurture, a small spark which can exist in a young journalist without his or her awareness, which can then be nurtured by a good editor. Culturally, the individual is not the engine driving BiH society, as the traditional values elevate the rights and interests of the group above the individual and complicate the development of modern public interest journalism. In such an environment, creativity and enterprise are rarely encouraged.

Non-sustainable supporting institutions. The main professional organizations charged with fostering professionalism in the media are BH Journalists and the Press Council. BH Journalists represents the interests of journalists; the Press Council is the industry's self-regulatory body. While many of BiH's institutions and media organizations are divided along ethnic and political divisions, these two organizations try to reach important stakeholders and beneficiaries throughout the whole country. Both of these institutions, however, are drastically limited in their effectiveness because they have unreliable revenue sources. Partly funded by foreign donors and by membership dues, the difficult social and economic situations of most journalists in BiH means that many members are not able to pay regularly. The establishment of a rival Independent Association of the RS has taken away part of its membership as well.⁶⁴

Lack of respect for copyright, sourcing or attribution. Informant journalists reported that their competing media steal their stories so often without attribution or compensation that the frequent theft

⁶³ MSI reports 2010 – 2016, SIM Monitoring and Evaluation report from 2016, as well as several KIs.

⁶⁴ More information about these institutions can be found here:

https://www.academia.edu/2045956/The_role_of_professional_journalist_associations_in_generating_professionalism_and_accountability_of_the_media_in_BiH

hardly makes an impression on them. Citizens of BiH refer to this practice as “copy-paste” journalism. Because journalism is not seen as important, journalist KIs said that journalists' work products are not seen as valuable or worthy of protection. The problem is multi-faceted; it is partly ethical and legislative, and partly a result of the weakness of the rule of law. In the rare cases in which journalists demonstrate quality journalism and innovation, widespread theft and the lack of credit means the professional rewards are practically guaranteed to be minimal.

Poor university-level journalism education. Many informants decried BiH's university-level journalism courses as completely abstract, theoretical and completely irrelevant to the practice of journalism. Courses taught at Sarajevo University include the Basics of Propaganda and the Rhetoric and Culture of Speech. Even the theory that is taught is often seen as anachronistic. Journalism students have few opportunities to learn any practical journalism skills outside of internships that are organized with media outside the university. While BiH journalists expressed mixed opinions about whether a journalism degree is necessary to become a professional journalist, almost all informants agreed that BiH's university-level journalism programs are inadequate.

Outdated equipment. On a purely technical level, BiH journalists themselves said that their work lags behind others in the region. Much of the equipment for producing and distributing news is out of date. Many local BiH television stations still use equipment from the 1980s. The technical gap between BiH and the rest of the region is both a cause and an effect of the low standards of media organizations, bad management, and lack of resources. The gap is especially visible between public media and private broadcasters such as Al Jazeera Balkans and NI, which have invested in modern technology, integrated newsrooms, and provide continual training of their staff. For example, NI invested €3 million to equip their three regional studios in Sarajevo, Zagreb, and Belgrade.

Lack of high-quality practical training opportunities. Most KIs agreed that the majority of BiH's journalists lack contemporary reporting skills and need training. KIs agreed that BiH's journalists are falling further behind their peers in the region in terms of technical skills as well as the quality of the media they produce. The economic pressures of the free market and the weakness of BiH's economy in particular, combined with global turmoil in the media industry and severe newsroom downsizing, mean that BiH media organizations today lack the personnel, time, and resources to invest in contemporary training of their reporters. The international community including USAID has invested significant resources in training over the last 20 years. But the withdrawal of donor support during the last 10 years has been felt sharply by BiH's media organizations, which, as a result, provided diminishing numbers of training opportunities. In addition, not all donor training provided so far is perceived as contemporary and useful. KIs provided examples of meaningful trainings, as well as of those that have been useless. Informants identified two elements of successful trainings: those that taught the right skills needed by trainees to be used on a regular basis at work, and those that targeted the right journalists, such as those who are eager to improve their professionalism.

Lack of regular monitoring of media compliance with professional standards. BiH is the only country in the region where regulators do not analyze media reporting and coverage routinely. Only a few organizations, media research institutes and watchdog platforms, such as analiziraj.ba and Analitika, monitor media compliance. There is a need for continuous support to understand whether media organizations measure up to professional journalism standards. Additionally, research is needed on which topics are covered most heavily and which are missing; to assess the overall quality of the most prominent broadcast and online media; and to identify examples of good / bad practices. To make media outlets accountable, regulators should scrutinize the content that the most prominent media organizations produce. Such reports would help donors, members of the media community and professional associations, as well as editorial boards and staff of the potential project hub, to tailor their support based on evidence.

6. PROBLEM 4: LACK OF MEDIA LITERACY

The public is apathetic and does not know how to interact with media. There is a lack of research showing precisely the habits of BiH's media consumers, the level of their critical understanding of media content, and the quality of media education. However, several KIs from media said that the public generally is apathetic: they do not react to any breaking story; no matter how solid the journalism is, mainly because they do not believe that their reactions will have any impact or be considered by decision-makers. Journalist respondents said that few citizens of BiH think critically about media content. Many people still trust what they hear or read in the media without skepticism. Research done by BH Journalists in 2015 showed that 80.6 percent of BiH citizens trust the media, much more than any other institutions (government, religious, and so forth.).⁶⁵

There is no research on media public in BiH, but based on recent reports and field research among youth in BiH and their perception on media and media messages, there are at least three different decoding modes of media messages. The first mode is passive acceptance of everything media serve and that correspond to ethnic and political belonging – people will believe ‘their own’ media and will not question the reliability of content and sources. The second is complete resistance to most of the things media serve and reflect general dissatisfaction with the state of media in BiH. The third and the more complex one is negotiation mode – receivers of media message will consume more than one media source, and will critically elaborate on the content, message and voices provided within. The last mode is in close connection with the most important skills and tools related to media literacy.⁶⁶

Media literacy is not part of educational curricula from an early age. Despite the increasing development of new technologies and the growing role played by media in society, there is no adequate public discussion of issues related to media literacy. Even when there are debates and initiatives, they do not include many stakeholders such as representatives of competent ministries, regulatory bodies, industry, the academic community, or the NGO sector. Analysis of the Joint Core of Curricula for Primary Schools has shown that media education does not appear as a separate subject.⁶⁷ An analysis by Sarajevo University found, “Media education is not adequately present either in quantitative or qualitative terms in education curricula in BiH. It is evident that the main focus is on the analysis of media content in terms of understanding media language, while aspects of gaining access to the media, a critical evaluation of media content and development of the competencies for communication through the media are ignored. ... Joint Core of Curricula does not list any competences which should be developed through media education and media culture. They are, however, listed in every teaching plan used in schools. The Agency for Pre-School, Elementary and High School Education, Department for Educational Standards and Students’ Achievements in Pre-School, Elementary and High School Education is responsible for establishing, monitoring and developing standards in this regard.”⁶⁸ The team identified 13 NGOs that are working on enhancing media literacy education in BiH.⁶⁹ The SIM project promoted media literacy as an important component, developing a media literacy strategy, lobbying for media literacy, supporting research,

⁶⁵ http://www.bhnovinari.ba/index.php?option=com_content&view=article&id=748%3Apredstavljani-r_ezultati-istraivanja-qmediji-u-bih-2015-medijske-slobode-profesionalizam-i-izazoviq&catid=63%3Adogaaji&Itemid=241&lang=bs visited June 14, 2016.

⁶⁶ This elaboration is based on Stewart Hall encoding / decoding codes, and intensive field research our team member, Davor Marko, conducted from July to December 2015, as UNESCO fellow, organizing 19 focus groups in 14 local communities of BiH, with 132 participants.

⁶⁷ Tajić 2013:58-59

⁶⁸ http://ppemi.ens-cachan.fr/data/media/colloque140528/rapports/BOSNIA-HERZEGOVINA_2014.pdf Visited June 12,, 2016.

⁶⁹ http://www.internews.ba/sites/default/files/resursi/Medijska%20pismenost%20u%20BiH_Model%20za%20razvoj%20medija%20i%20dru%C5%A1tva.pdf accessed June 12, 2016.

publishing the books "Media Literacy in BiH" by Lea Tajić⁷⁰ and a collection of articles edited by Vanja Ibrahimbegović Tihak⁷¹, and conducting trainings.

7. USAID SUPPORT TO MEDIA IN BOSNIA AND HERZEGOVINA

The field research that the team conducted for this assessment revealed that stakeholders had the following impressions about the advantages of support from US donors relative to EU donors:

- Key informants generally agreed that US assistance is more flexible, content-oriented, concrete and bottom-up than European assistance, which is based more on institutional development, infrastructural support and long-term strategic accession goals, and is mainly top-down.
- During the early phases of assistance (the second half of 1990s), U.S. support was seen as fundamental to developing the media scene, establishing new institutions and supporting alternative, anti-nationalist voices by establishing new media. Today, the U.S. approach is no longer seen as reformist, but rather supportive in the sense of preventing further erosion.
- U.S. assistance directly supports media organizations and outlets, as well as individuals (a bottom-up approach) while European donors view media as part of wider institution building. EU priorities including support for PSB, regulators, unions, professional associations, and public institutions (a top-down approach).
- U.S. donors' procedures for applications for media support are simpler, more flexible, and less bureaucratic than those of EU donors. Informants said that European organizations require media organizations to plan their needs several years in advance and have other formal complex approval procedures. In some cases, European donors provide only matching funds.
- U.S. assistance to support investigative journalism and high quality public interest journalism is perceived by KIs as effective and to have proven results. EU donors insist on complex normative principles and standards from beneficiaries performing journalism.

However,

- U.S. (and other donor) support cannot be expected to change BiH's dominant cultural and policy patterns.
- U.S. support has no leverage if there is no political will.
- Without being asked, four key informants said explicitly that the US is seen at times as politically selective in its approach to BiH media, supporting the anti-nationalist political agenda, but also favoring opposition-oriented media rather than non-partisan media organizations.

8. RECOMMENDATIONS FOR IMMEDIATE USAID ASSISTANCE

After examining the evidence and identifying the four major media problems, the assessment team concluded that immediate USAID assistance will have the most impact if it addresses Problem 3—Poor Professional Development. The first two types of problems—Political Instrumentalization of Media and Opaque Media Market—are problems that largely relate to the external environment and will be less effectively addressed by international donors' involvement. The fourth problem, Lack of Media Literacy, is largely policy-oriented and requires more complex and long-term involvement. The team devised two recommendations for immediate USAID media assistance.

⁷⁰ http://www.internews.ba/sites/default/files/resursi/Medijska%20pismenost%20u%20BiH_0.pdf Visited June 16, 2016.

⁷¹ http://www.internews.ba/sites/default/files/resursi/zbornik-a5_final.pdf accessed on June 21, 2016.

RECOMMENDATION I: DIRECT SUPPORT FOR EXISTING MEDIA WITH A PROVEN RECORD OF PRODUCING HIGH-QUALITY AND INDEPENDENT JOURNALISM

USAID will be able to have the highest impact with the lowest risk if it provides assistance to support media that it knows already produce high quality and independent journalism. High quality journalism generally is defined in BiH as reporting that serves the public interest, addresses socially significant events fairly and impartially, based on solid sources and research, and creates a positive counterexample to the uncritical stenography that commonly passes for journalism in BiH. Because USAID is familiar with the media organizations and their products, some organizations already have a track record as USAID beneficiaries such as Zurnal, CIN, Buka, and so forth, the most likely outcome of such intervention will be more of a known good quality.

Several online and television media organizations deserve support, mainly to survive their difficult economic situations, continue their work, and play an important role in the BiH media ecosystem. Primarily, this support would enable these organizations to produce investigative stories that are unattractive to advertisers due to the political volatility of the malfeasance they uncover. Such stories also are unpopular with other media that are unlikely to republish or rebroadcast the stories because of the potential of uncomfortable political reverberations. These media organizations continue to struggle for a wider audience. There are three media organizations that have demonstrated that they produce high quality investigative journalism—Center for Investigative Journalism (CIN), Balkan Investigative Report Network (BIRN), and Zurnal. All there have been USAID beneficiaries. The sites Analiziraj.ba and Media.ba also produce quality journalism but are more specialized as analytical media watchdog platforms. A newly established web portal from Banja Luka, Capital.ba, has been recognized for its investigative reporting and should be supported by USAID. Capital.ba has the rare distinction of having established a business plan. Activist online web media include Buka and eTrafika from Banja Luka and Tacno.net from Mostar. These sites explicitly promote an anti-nationalist political agenda and advocate for human rights, openly taking on highly sensitive social and political topics - with the exception of eTrafika. None are sustainable without donor funds.

Advantages: Targeted, focused and continuous support will enable beneficiaries to continue their operations and play an important role in journalism in the BiH media. Support will enable media organizations to secure the plurality of media approaches, solidify the limited gains made in independent media, and prevent the further loss of journalistic voices. Support will enable media organizations to retain journalistic talent within the industry, countering the tendency of talented young media professionals to seek better salaries and professional opportunities in other fields such as public relations. Additionally, USAID will require minimal administration to directly support a selected number of these media organizations because the organizations are already operational and known to USAID, and the support will enable them to continue their current activities. By providing funding for five years, USAID will secure operations long enough for a news organization to experiment, try new approaches, seek new means of story-telling, and focus on journalism and attracting new readers, before the media organization has to start soliciting donors again. Any greater investment will enable a media to expand its current capacities. USAID should directly fund these media organizations and place minimal restrictions on their activities and minimal pressure to predict their needs, which might limit future development options. More administrative simplicity means more capacity for media to focus on journalistic excellence.

The quality media to which the assessment team proposes USAID provide support generally do not have mainstream popularity, but their existence is essential to establish the precedent that public interest journalism can thrive without representing political and economic interests. Indeed, news is not the most popular content provided by BiH media.

Risk: The risk of this approach is that unrestricted funding might yield less ambitious results. A recipient free from the burdens of struggling for survival and commitments to specific programs might have more capacity to innovate and be independent. The lack of pressure, however, might reduce the recipient's motivation to reach new audiences and produce better journalism. The best way to mitigate these risks will be to encourage the recipients to develop new media ideas and document progress toward larger goals, without stifling innovation or preventing them from using funds for unanticipated needs. USAID should work only with media organizations that have demonstrated their commitment to excellence, independence, and openness to improving their journalism.

Assistance should not be conditioned on sustainability. No informants from non-profit media expressed any hope that significant non-donor sources of revenue could be found in the next 5 or perhaps even 10 years. In fact, the assessment team's research presented a bleak picture of the economic viability of quality media in the BiH market: survival is highly uncertain. In the context of BiH's medium-term economic and political outlook, the team concluded that an organization's financial sustainability should not be a requirement or, a condition to receive, or even a goal of USAID media assistance to BiH. Donors will be the most important, if not only, source of support for independent BiH media in the next 5 to 10 years.

BiH media are by no means the only media organizations struggling to survive. This conclusion reflects the precarious situation of quality non-profit media globally. Even in the world's most developed countries such as the U.S., the free market cannot support much of the best public interest journalism. The top investigative journalism organizations in the U.S., for example, are non-profits funded almost entirely by donors: ProPublica, the Center for Public Integrity and the Center for Investigative Reporting. Recognizing the increasing inability of the free market to support quality journalism, the MacArthur Foundation in May 2016 granted \$25 million to mostly non-profit public interest journalism organizations in the U.S.

By dropping the emphasis on sustainability, BiH's media organizations can focus instead on the challenges of producing quality journalism and finding creative ways to attract new consumers. Non-profit media understand that they will need more donors when the assistance runs out, after 1, 5, or 10 years. For many journalists engaged in the most innovative and meaningful public interest journalism, this is the new reality of the media industry. Not a day goes by without a journalism conference being held somewhere in the world addressing "how to monetize quality journalism in the internet age." The "legacy media" business model according to which subscriptions and classified and commercial advertising once paid for journalism is in decline everywhere. Until media organizations find a new functioning business model to replace the old system, donors will be the main source of support for quality media all over the world.

RECOMMENDATIONS 2: SUPPORTING THE PROFESSIONAL DEVELOPMENT OF INDIVIDUAL JOURNALISTS, MEDIA ORGANIZATIONS AND THE PRODUCTION OF HIGH-QUALITY NEWS THROUGH A TRAINING AND PRODUCTION HUB

Supporting a training and production hub would be the most effective way to develop professionalism in BiH media by introducing new ideas, know how, good practices, modern equipment, and resources to existing media organizations, and to train young journalists and local editors. According to the majority of KII, training is most successful when trainees employ their new skills, knowledge, and experience practically to produce stories in a real newsroom environment for public consumption on a regular basis. USAID could support might be a physical training hub, created as a standalone organization, or providing funding so that a hub is hosted within an existing media organization. The means by which USAID could deliver money, training, and equipment has many variables and can take many forms.

This approach potentially will facilitate the following activities:

- A production hub to facilitate technical training and content production for staff journalists, freelancers and journalism students;
- Support for video news production with online distribution via web and mobile devices;
- An independent editorial advisory body to increase the professionalism of daily reporting and investigative journalism;
- Small grants for individual journalists to produce stories, which will include an online distribution platform; and
- Media hub trainer(s) embedded in a BiH news organization, for on-the-job organizational capacity building.

The first four components of a potential intervention of creating a training and production hub are complementary. They would jointly foster the professional development of individual journalists by increasing capacities of journalists through high-quality practical training, providing editorial services, and small grant program, while at the same time securing a distribution for resulting high-quality stories channel (which was missing in previous interventions) through news production and development of online video channels. The fifth component would further the development of BiH journalism at an organizational level by providing high-quality training and on-the-job organizational capacity building for existing BiH news organization(s).

Create a media hub to foster the professional development of individual journalists and the production of high-quality news

A media hub could be established as a physical space in which to provide training and production, editorial oversight, and mentoring to individual and media organizations, as well as have the necessary production equipment available. A small team led by a highly qualified journalist who has experience in reporting, management, and training could implement the intervention. The hub management position would work best as a combination of managing editor, executive producer, and hub director. KIs expressed that three years would be the minimum time needed for a training/production hub to generate enough momentum for both journalistic excellence and to permeate the small BiH media sector. At the very least the project should be run by a journalist, not a project manager, to ensure that the intervention is governed by the principles of journalism and not project management.

Advantages: The BiH media sector has been declining for 10 years. A fresh, massive and concentrated injection of ideas, energy, resources, and best practices might be the only way to generate lasting high-quality standards in BiH media. A proactive production/training hub that offers modern skills, equipment, and top-level editorial guidance will be the best way to address the lack of training and professional development opportunities for BiH's journalists. The lack of resources and overstretched personnel at media organizations drastically limits the opportunities for professional improvement of BiH journalists. Such a hub would also provide a physical base for freelance journalists to develop professionally and use otherwise unavailable expensive audio and video equipment to produce their own stories as well as paid databases to conduct investigation. This approach would encourage independent journalism and new media voices.

Risks: Many media development projects that are professionally run by project managers often fail to produce excellent journalism. Thus, a highly qualified journalist with significant international experience should lead such a hub. Instead of development contractors, USAID could seek bids from journalists and journalistic organizations such as the BBC Academy or the Thomson Reuters Foundation to ensure that journalistic excellence is the only focus of the program. Only a journalist who has the highest professional standards, managerial experience, strong will, creativity, and significant resources can induce deep and positive development of BiH media.

Journalists said that if they receive training for skills that they do not apply to real world needs, the skills tend to evaporate quickly. To mitigate this, the hub should have the flexibility to adapt trainings specifically to target the needs of carefully selected partner journalists and media organizations. For example, the hub would work individually with several journalists on their personal stories for months throughout the entire process, finding story ideas, providing editorial guidance and paying for story expenses. A trainer might teach a group workshop in the hub on lighting, digital editing, or audio field recording, or pay to send BiH journalists to London for specialized trainings. The trainer could also make cameras and video editing equipment freely available for affiliated journalists in a physical hub, or for reporting stories outside, without providing any oversight.

Another risk is that the production hub would not be used. Equipment is expensive and needs frequent upgrades. The facility should be designed according to concrete interest expressed by stakeholders. Stakeholders and donors should perform due diligence to ensure that partner media and journalists in fact will use the facility, in which ways, how often, and for what purpose. Every aspect of the facility should be designed in light of real and confirmed user needs.

Support the development of online video news

The aim is to improve the quality, scope, and technical capacities of video journalists who are working to create a relatively new form of product. The focus can be on creating a new independent internet TV channel, or it can work with an existing media organization, or several which already are producing video stories, such as Zurnal (investigative videos – ‘Afera’), Buka (interviews and stories broadcasted online and via terrestrial) or Source.ba (established as video news portals).

Advantages: Online video is very popular and there are no BiH media organizations that specialize in producing video news for web and mobile devices. This niche has the strongest potential for growth of any type of news media in BiH: print, online, radio, or television. Now is an opportune moment to support media developing their capacities in this area. Video production is less expensive than broadcast television. Even starting a completely new online video media channel is not a large investment. Such a channel can be set up in a small space with a few cameras, an editing suite, a server, and a staff of less than 10: a few reporters and editors, a camera operator, a video editor and a programmer to run the website. With its own free online distribution, the media would not need to depend on existing politicized broadcast television channels to find audiences.

Risks: Regardless of the popular, flashy, and trendy format, even online video news without high-level journalistic guidance will be doomed to mediocrity. However, as this component is proposed in conjecture with other components that will work on capacity building and increasing quality of journalism, this risk is minimal. The production unit should be run by an ambitious and energetic journalists who has television news experience in all aspects of production. The leader will dedicate significant time and resources to training staff in high journalistic standards as well as modern professional television production as a key goal of the activity. A three-year commitment from the leader will be necessary to train editors and reporters and establish the brand. After three to five years, KIs said that such an activity would likely have influence across the BiH media landscape and inspire others to follow its example.

The experience of Zurnal, Buka, and Source have shown that BiH’s media consumers do not widely watch online video / television formats. Media can alleviate the risk of a small audience by establishing partnerships with existing television stations that broadcast through analog, cable or IPTV channels. The website also could serve as an online archive for distribution of stories to other television media as well.

Editorial Advisory board

The media hub could form an editorial advisory group to provide editorial mentorship to selected journalists. The body could be made up of experienced and independent editors and journalists. It would provide flexible and independent editorial expertise and mentorship, guiding print, online, radio, and television stories through the entire editorial process without being attached to any specific institution or organization. The group would closely cooperate with beneficiary media outlets, to provide them with story-production expertise, potentially even finding and assigning story ideas and helping to find young journalistic talent. Apart from mentoring and advising, the Editorial Advisory board could be in charge of allocating small grants (within the next component described below) to the most promising journalists and stories, providing editorial guidance throughout the process.

Advantages: A one-stop editorial advisory group would encourage high journalistic standards and creative new approaches toward story-telling and attracting new audiences. Few journalists have the time, resources or the opportunity to step back and think about the best way to approach a given story before reporting it. A readily available supply of editorial expertise could invest heavily in early career journalists who need more help and less on more experienced journalists who might need only occasional advice on concrete matters, such as a technical question, support for a specific story expense, or an edit. A flexible approach will also help smaller non-profit media access training. Small organizations often are unable to send their journalists to trainings because in their absence they lack sufficient personnel to run the newsroom.

Risks: Donor providing assistance to media organizations could minimize the risk that the organization chooses the wrong partners or board members for the wrong reasons by performing due diligence and by spelling out the broad strategic duties and obligations of the advisory body in way that enables the members to maintain independence while preventing the production of mediocre journalism. The board should also be able to work with promising less experienced journalists. The advisers would be charged with pushing their affiliated journalists toward the highest standards of journalism. To maximize its independence, the members of the advisory board should be experienced journalists who are not tied to any particular media organization, or political or economic interests.

Small grants program for story-production and online platform for distribution of stories

The hub could also create a small grants program for story-production and an online platform to distribute the stories to a variety of media. The program would need a grant board to choose and advise grantees, an editorial liaison to work with BiH media to arrange story placement, grant administration and a web designer and programmer. The website that the group launched will serve two goals. It will play an important role as an online archive of stories available to media outlets to republish or rebroadcast. It also will enable BiH's media to find stories to publish on topics that normally do not receive much coverage such as local news. The web page would instruct grantees how to apply and provide an interface for receiving applications, information for editors to license grantees' stories and a showcase to publish stories produced.

Advantages: The intervention will help both freelance journalists and staff journalists who otherwise are unable to spend significant time and resources reporting a single story. The program will give grants for story-reporting expenses such as travel and equipment, labor fees for freelancers, and salary replacement for staff journalists. The program would be especially helpful to freelancers and to fund reporting by staff reporters of more difficult, complex stories that otherwise will be too expensive or labor-intensive without donor support. The program will strengthen media independence and new voices.

Risks: One of the problems that affected the past small media grants programs funded by the SIM activity was that stories produced with donor funding could not find an outlet for publication or broadcast. With its own dedicated website, an editorial board program will ensure that each story produced by grantees will at least reach an audience online. The editorial board should work actively with BiH's media organizations to try to place stories at the beginning of the grant process to ensure that all stories reach the largest audience possible. The program could give preference to stories that have concrete interest from editors. The program also will need strong editorial leadership to facilitate successful journalism and keep standards high to prevent grantees from employing bad journalistic practices.

Embed well-qualified trainer(s) from the media hub in a BiH news organization for on-the-job organizational capacity building

Experienced journalist trainer(s) with international experience from the created media hub could be embedded within an existing BiH media organization. Journalist trainer(s) should have significant editorial and managerial experience. Working within a selected media fulltime and continuously with its staff will build the editorial culture of a media organization and raise professional standards in a lasting way. They should work with editors, managers and executives. The main goal would be to focus on training local editors in order to facilitate maximally sustainable personal and institutional development. The focus should be on developing the professional journalism standards of the organization, increasing quality, attracting bright and creative young journalists and finding new ways to attract new audiences.

Advantages: The trainer(s) would be able to respond to the needs of the partner media in the most flexible way possible. By operating from within, the trainers and assistance resources could be most effectively directed for maximum impact. By coming to work at the organization every day, the trainers would also make sure that the training and skills and management are implemented by the media personnel on a daily basis. Informants say that the best way to learn new skills and standards is by putting them into practice on a regular basis. Raising standards in a media with poor professional practices in a media environment as difficult as BiH is far more complex and time-consuming than typical more concrete development activities such as distributing mosquito nets or building water treatment facilities. The only way to significantly raise standards and create lasting quality in a BiH media is for trainers to literally sit in the editorial office and work side by side with journalists every day.

Risks: Because of the intense focus and organizational challenges involved, the main risk is that the partner organization might lose its interest or will to change. There should be no doubt that creating truly excellent journalism in BiH - by international standards - will be extremely difficult. It will require several years of enormous efforts both from the trainers and the partner organization and staff. To maximize success, an assessment should be performed for potential media partners. They must have a track record of producing quality news and a demonstrated commitment to organizational development and excellence and a very clear understanding of what achieving high professional standards will mean for their organization.

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ANNEX I. SCOPE OF WORK

ASSESSMENT OF MEDIA SECTOR IN BiH

I. PURPOSE OF ASSESSMENT

There are two main objectives of this assessment. The first objective is to determine the broad status of reforms and needs in the media sector in Bosnia and Herzegovina (BiH). Second, USAID/BiH wants recommendations on needs/possibilities for further USAID involvement in the sector.

The USAID Mission in BiH seeks to gain a better understanding of the current media climate, gaps and needs, successes and failures, and to hear the recommendations for potential new USG-funded programs. USAID's last media assistance projects expired in 2015, so the purpose of this assessment is to gain better understanding of the current situation in media sector that may inform the decision on the future programming in this area.

II. POLITICAL AND ECONOMIC FACTORS

Mainstream media in Bosnia and Herzegovina (BiH) is highly polarized along ethnic and political lines and often serves to exacerbate already existing ethnic divisions. Media often focus on events related to the war in the 1990s and exploit information to promote ethnic stereotypes and even stir up inter-ethnic tensions. Such reporting instills fear and mistrust between ethnic groups and greatly influences negative perceptions and attitudes towards members of other ethnic groups. Despite criticism and widespread beliefs that the media in BiH is poor in quality, many lack the knowledge or necessary tools to approach the information they receive critically or objectively. This can be especially true regarding Bosnian youth who are among those most vulnerable to the rhetoric of irresponsible leaders.

An Introduction

Bosnia's convoluted political system has dictated the structure and nature of the country's media landscape, and each entity has its own public broadcaster, private media, and political parties. The majority of Bosnian media is under political party control, and politicians actively manipulate the media, both for political gain and personal enrichment. They often promote antagonistic propaganda and divisive messages to maintain the status quo, which allows them to profit without being held accountable to Bosnia's citizens.

Journalists are subject to the pressures of the political parties and media owners (many of whom are political figures or affiliates). Ethnic and political pressures and loyalties influence media reporting and editorial decisions, including the time and space allocated to different news topics, especially those that are "sensitive" in nature - coverage of war crimes trials and rulings, genocide commemorations, and matters regarding contested histories. Such an atmosphere makes it difficult for journalists to apply proper investigative journalism techniques and deters them from speaking out publicly in an effort to hold those in power accountable for their actions and policies. Consequently, media coverage often fails to present more than one side of a story, and press ethnics need not to apply as media representatives fail to distinguish between assumptions and facts or to provide a proper analysis of events. Journalists are not only pressured from the top-down, but also from the bottom-up. Ethnicity strongly influences the way people in Bosnia consume media: many Bosniaks rely on Sarajevo-based TV, radio and print media; the majority of Bosnian Serbs are geared towards RS- and Belgrade-based media; and Bosnian Croats tend to lean towards media from Croatia. Finally, when the media's boards of decision-makers, editors, and producers lack cultural, political, and ethnic diversity, their products become inherently biased.

Media has a strong influence on the Bosnian population, and many lack the tools necessary to approach the information they receive via the media critically and objectively. Youth are especially

vulnerable to propaganda and media manipulation. Many youth often do not travel outside of their local towns and communities, which results in limited interaction with members from other ethnic groups. This significantly increases the likelihood that youth will form their opinions based on the messages and information they receive via the media. The media has and continues to leave a deep imprint on the collective opinion and on inter-ethnic relations in Bosnia, and problem of media manipulation must be addressed in order for this country to truly move towards reconciliation and renewed inter-ethnic cooperation⁷².

MSI 2014 indicated: “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 unregulated⁷³.

Almost 30 percent of broadcasters are still owned by governments. Governments continuously provide, in a nontransparent manner, subsidies to public and private media outlets in exchange for positive coverage. Local estimates will soon show more precise figures, but financing of public and private media outlets by governments is close to 15 million Bosnian Convertible Marks (BAM) annually⁷⁴.

⁷² Rising Voices: A One-sided story: Bosnia and Herzegovina’s media landscape

⁷³ MSI 2014

⁷⁴ SIM final report, MEASURE

According to the MSI reports, business management remained the weakest dimension of media sustainability, suffering a decline of 0.85 in the MSI score from 2010 to 2015. This same dimension of media sustainability demonstrated strong growth in the period from 2004 to 2009 (from 2.31 to 2.82). MSI panelists, year after year, highlight dire financial circumstances in the media market, oversaturation of media market, flawed fiscal policy, a lack of managerial competence of people heading local media, and a lack of advertising investments by local companies as main causes. These factors keep most media on the verge of existence and only a few larger media outlets are truly self-sustainable enterprises.

Importantly, these market trends occurred in a period when international direct assistance to media outlets significantly decreased, following a decade and a half of intensive support from various donors⁷⁵.

III. MEDIA ASSISTANCE ⁷⁶

BiH is an example of intensive media assistance efforts aimed at creating a friendly environment for media. However, the international support was scarce between 2010 and 2015. Various international agencies played an important role in media support in the post-war period. USAID alone invested more than \$40 million between 1996 and 2013 while the European

European Commission spent over €20 million from 1996 to 2002 on media assistance. The Open Society Fund BiH disbursed more than \$9 million from 1993 until 2009 to that end. USAID assistance to build media environment and support development of media institutions in BiH has been considered crucial.

USAID sought to “support leaders within the media sector, integrate institutional expertise of BiH within the USAID supported media development effort, and implement alternative methods of improving the quality of journalism products available through local media outlets”. Its support had direct and indirect influence on establishing a group of leading media outlets considered “independent”. As previous USAID assessments indicated, “encouraging domestic television production was a worthy goal, although with mixed results during implementation.”

Some of the problems that undermine the results of the reform efforts have to do with the nature of the media assistance approaches deployed. Lacking a strategic approach, early intervention in BiH was often based on ad hoc decisions, a sudden change of priorities, short-term and unreliable funding, and a lack of strategic orientation and commitment by donors that contributed to the failure of reform efforts. Analysts have identified a number of shortcomings in the media assistance the international donors provided in BiH, some of which are the following:

- Imported models used as a blueprint for institutional reforms sometimes did not correspond with the local setting.
- Dependence on donor funds and their influence over the financial sustainability of the recipient media outlets and institutions.
- A very limited window of opportunity for substantial cooperation between the international donors and local decision makers.
- The vacuum left after the international donors had stopped monitoring the governments, criticizing them, exerting pressure on them, and using sanctions.
- Significant conceptual differences in the approaches to media assistance among donors, especially between the Europeans and the Americans.

SIM evaluation found that USAID launched SIM at the moment when other international support

⁷⁵ SIM final report , MEASURE

⁷⁶ SIM final report , MEASURE

was scarce, and the expectations of media outlets were high. After 2006, USAID stopped its direct assistance to media, and other donors significantly decreased it. While SIM produces some results and assisted many worthwhile ideas of BiH media outlets, being a single media assistance program in the sector oversaturated with problems and issues, SIM's possibilities for deeper changes were limited.

Regardless of number of interventions implemented in BiH, the media scene remains highly polarized, with increased political and financial pressure on the media and intimidation and threats against journalists.

IV. STATEMENT OF WORK

The assessment team, consisting of at least two media experts, will undertake the work required to produce a report that will assess the state of the BiH media sector in terms of its independence, financial sustainability and how effectively the sector provides balanced information. The purpose of the assessment will also be to develop recommendations for potential future activities based on the current media and political situation in BiH. The sector assessment will also identify impediments to the development of a balanced independent media sector. The assessment team is expected to come up with recommendations that would address these main questions:

- What are the areas of the BiH media sector that require the most urgent assistance that can be provided in the next 5 years?
- What types of assistance might be the most effective in those areas, and on what scale?
- What are the comparative advantages of US assistance to media outlets?

In carrying out the sector assessment, the assessment team should review the work that USAID has funded since 2010 in support of media; the activities that other donors and governments have supported or funded; and the state of media in BiH.

V. ASSESSMENT TASKS

The Team Leader will be responsible for leading the assessment team. All assessment team members will be responsible for developing and writing a sound methodological plan (proposed schedule, destinations, and timetable for the work to be conducted in country) and drafting a comprehensive assessment report with key recommendations and findings.

Task 1: Desk Review

This review shall include reading all relevant background materials as provided in Attachment A, background interviews and at least one conference call with staff from USAID/BiH's Democracy Office. The conference call is important to ensure that the Mission and the assessment team are in agreement on the scope and purpose of the assessment.

Task 2: Develop a Written Fieldwork Plan

Using the information gained from the desk review along with this SOW, the assessment team will develop a plan for how the fieldwork will be conducted. The plan should clearly outline the methodological approach that the team will use to complete the assessment as described in this SOW. The plan should be approved by USAID/BiH prior to arrival in country.

Task 3: Conduct a Field Assessment

The assessment team will spend two weeks in-country to conduct the assessment according to the written plan approved by USAID/BiH. Field work will commence on/or about _____ 2016 and end on/or about _____ 2016. While in BiH, the team will meet with key media representatives, representatives of IC organizations and activities, civil society organizations, USAID staff, and others.

Task 4: Debrief Embassy and Mission

Before departing the country, the assessment team will debrief interested personnel from USAID and Embassy on the team's preliminary findings and recommendations. At least once during the field work the Team is expected to conduct the mid-briefing.

VI. VI. DELIVERABLES

A. Written Fieldwork Plan as described in task one due not less than 5 business days before fieldwork commences.

B. Draft Assessment Report due within 7 calendar days following completion of fieldwork. USAID/BiH will provide written comments within 7 calendar days of receiving the first draft report.

C. Final Draft Assessment Report due not more than 7 calendar days after receipt of USAID/BiH's comments on the draft assessment report. The final draft assessment report will include, at minimum, an executive summary; major findings and conclusions; a description of the assessment methodology; and specific program recommendations. The main text should not exceed 30 pages (not including annexes). The final assessment report will be submitted to Jasna Kilalic, Deputy Democracy Office Director, in electronic format as well as in hard copy within 5 business days after receiving USAID/BiH's final written comments and/or questions.

VII. RECOMMENDED COMPOSITION OF ASSESSMENT TEAM

The assessment team should consist of at least two media/ experts. The team should have an understanding of media in transition countries, in both the public and private sectors. Experience working on media efforts in BiH and/or the region is required. Team members should have good analytical and writing skills. Members of the assessment team are authorized to work a six day work week.

VIII. LOGISTICAL SUPPORT

assessment team will be responsible for making all logistical arrangements, including, but not limited to, scheduling appointments, arranging transportation and providing translation services.

IX. PERIOD OF PERFORMANCE

The period of performance for this activity will be on/about _____2016 to on/about _____, 2016. Field work should be conducted during the period from _____, 2016

Proposed timeline for the assessment:

- – desk review, background interviews & development of fieldwork plan
- – Assessment
- – Draft assessment report due
- – Mission comments are due
- – Final report due

ANNEX 2. LIST OF KEY INFORMANTS FOR INTERVIEWS

| Date | Name | Position | Organization/Affiliation | Respondent Type |
|-------------------------|---------------------|--|------------------------------------|--------------------|
| Sarajevo | | | | |
| Monday May 30 | | | | |
| 1 | Ivan Barbalić | Former BiH ambassador to the UN and Russia | | External |
| 2 | Almir Šećkanović | Editor | Faktor | External |
| 3 | Lejla Bičakčić | Executive Director | Center for Investigative Reporting | Direct beneficiary |
| 4 | Kenan Efendić | Digital Media Manager | Center for Investigative Reporting | Direct beneficiary |
| 5 | Eldar Dizdarević | Economic analyst | Independent | External |
| Tuesday May 31 | | | | |
| 6 | Vuk Bačanović | Executive editor | novi.ba | External |
| 7 | Bakir Hadziomerovic | Editor in chief | novi.ba | External |
| 8 | Damir Kaletović | Director | novi.ba | External |
| 9 | Senad Zaimović | Director | Fabrika | External |
| 10 | Vesna Beganović | Director | Via Media | External |
| Wednesday June 1 | | | | External |
| 11 | Ivana Maric | Political analyst | Konrad Adenauer | External |
| 12 | Ines Bamburać | Executive director | Mediacenter | Direct beneficiary |
| 13 | Almir Panjeta | Journalist | Independent | External |
| Thursday June 2 | | | | |
| 14 | Irham Čečo | Political/media adviser | BH Presidency | External |
| 15 | Senad Hadžifejzović | Journalist / editor | Face TV | External |
| 16 | Milan Trivić | Director | BH Radio | External |
| 17 | Enes Osmančević | Professor | University of Tuzla | External |
| 18 | Mirza Mehmedović | Assistant | University of Tuzla | External |
| Friday June 3 | | | | |
| 19 | Srećko Latal | Journalist / editor | BIRN | External |
| 20 | Amir Zukić | News director | NI | External |
| 21 | Eldin Karić | Executive Director | Zurnal.ba | Direct beneficiary |
| 22 | Branka Radević | Journalist | Zurnal.ba | Direct beneficiary |

| Date | Name | Position | Organization/Affiliation | Respondent Type |
|-------------------------|-----------------------|---------------------------------|---|---------------------|
| 23 | Selvedin Avdic | Editor | Zurnal.ba | Direct beneficiary |
| 24 | Elma Bešlic | Law student | Media Law center | Direct beneficiary |
| 25 | Anja Gengo | Lawyer | Media Law center | Direct beneficiary |
| 26 | Jasna Jelisić | Political adviser | EU Delegation | External |
| 27 | Siniša Vukelić | owner, editor | Capital.ba | External |
| Monday June 6 | | | | |
| 28 | Tarik Đodić | Managing Director | Al Jazeera Balkans | External |
| 29 | Melina Kamerić | PR & Communications | Al Jazeera Balkans | External |
| 30 | J.B. Leedy | Press Attaché | US Embassy | US Embassy |
| 31 | Susan Abbott | Independent media consultant | UC Denver | External |
| Tuesday June 7 | | | | |
| 32 | Matthew Briggs | Foreign Service Officer | US State Department | US State Department |
| 33 | Amer Džihana | Editor | Analiziraj.ba | Direct beneficiary |
| 34 | Ozren Kebo | Coordinator | Analiziraj.ba | Direct beneficiary |
| Wednesday June 8 | | | | |
| Banja Luka | | | | |
| 35 | Borislav Vukojević | Assistant professor | University of Banja Luka | External |
| 36 | Draško Ignjatić | Program director | RTRS | External |
| 37 | Nataša Tešanović | Director | ATV Banja Luka | Direct beneficiary |
| 38 | Aleksandar Trifunović | Editor | BUKA | Direct beneficiary |
| 39 | Vanja Stokić | Editor | e Trafika | Direct beneficiary |
| Thursday June 9 | | | | |
| Mostar | | | | |
| 40 | Željko Šteger | Editor | Bljesak | Direct beneficiary |
| 41 | Štefica Galić | Editor | Tacno | Direct beneficiary |
| 42 | Amer Bahtijar | Journalist | Tacno | Direct beneficiary |
| 44 | Amna Popovac | Member of the Steering Board | PEM – Association of Private Electronic Media | External |
| 45 | Marija Živković | Director | Nasa TV | External |
| 46 | Ivan Cigić | Editor | Nasa TV | External |
| Friday June 10 | | | | |
| Sarajevo | | | | |
| 47 | Anonymous | Journalist | | Direct beneficiary |
| 48 | Helena Mandić | Director of broadcasting sector | Communication regulatory agency | External |

| Date | Name | Position | Organization/Affiliation | Respondent Type |
|-------------------------|---------------------|----------------------|--|-----------------|
| 49 | Asja Rokša Zupčević | Audiovisual services | Communication regulatory agency | External |
| Saturday June 18 | | | | |
| Skype | | | | |
| 50 | Tarik Jusić | Executive director | Analitika - Center for Social Research | External |

ANNEX 3. KEY INFORMANT INTERVIEW GUIDES

Below are instructions for interviewers with lists of questions, including probing questions, for the Key Informant Interviews.

Coding refers to the three assessment questions:

- Q1.** What are the areas of the BiH media sector that require the most urgent assistance that can be provided in the next 5 years?
- Q2.** What types of assistance might be the most effective in those areas, and on what scale?
- Q3.** What are the comparative advantages of US assistance to media outlets?

ASSESSMENT INTERVIEW GUIDE

The interview guides are intended to serve as semi-structured guides for your conversations with key informants. Do not read the questions or probes word for word. Instead, adapt the wording to match the phrasing used by the respondent. Take notes on key terms or phrases used by the respondents that may be helpful in coding the interview data. Ask for clarification and definitions as needed.

Familiarize yourself with the interview protocol guides in advance of your meeting. Skip questions that are not relevant given the interviewee specificities. Highlight the questions you will prioritize if the respondent's time is limited. Be respectful of the respondent's time and keep the interview to the agreed length of time. We can follow up by phone or email for more information as needed.

In addition:

- Take notes during the discussion. To ensure we accurately report what is discussed during the interview, we will record this session as well. No one except the assessment team will have access to this recording.
- As necessary, tailor all questions to fit the individual respondent's relationship with the assessment.
- Keep the discussion under ninety minutes.
- The assessment team will ensure that the information shared through these interviews remain strictly confidential.

Thank you for agreeing to speak with us today. My name is <name> and this is <name>, and we are researchers from USAID/BiH Monitoring and Assessment Support Activity (MEASURE-BiH). We are here today because USAID/BiH has commissioned MEASURE-BiH to conduct an independent assessment of the media sector in BiH and make recommendations for future USAID media assistance in BiH. Our aim is to learn from your experiences, not to audit or judge your work in any way. The information you provide to us will be used in combination with what we learn from others to produce our assessment and recommendations. We would like to ask you several questions regarding the media sector. Your comments are confidential and you will not be identified by name in any report.

<NAME> will be taking notes while we talk. With your permission, we would also like to record this session so that we can refer to the audio to clarify our notes later if necessary. Do we have your permission to begin recording? Do you have any questions before we start?

First I'd like to start off with some general questions to give us a little bit background.

- Q1.** What are the areas of the BiH media sector that require the most urgent assistance that can be provided in the next 5 years?

1. How would you describe the current state of the Bosnian media sector?
 2. What are the tendencies, i.e. where are things heading?
 3. What is the size of the annual advertising market in Bosnia?
 - a. television
 - b. radio
 - c. print
 - d. online
 4. What are the other sources of income for media - and in what proportions?
 - a. government: state, entity, cantonal, local
 - b. oligarchs / sponsors willing to operate media at a loss in exchange for influence or prestige
 - c. international donors
 - d. NGOs
 5. Do most commercial media in Bosnia make a profit, break even, or operate at a loss?
 - a. how would you break down the proportions?
 6. How is media consumed in Bosnia?
 - a. estimate percentage of population and through which type of media do they get their news: print, television, radio, online, mobile devices?
 - b. how is it changing?
 7. How would you characterize the professional quality of Bosnian news?
 - a. professional ability of journalists
 - b. technical quality of the media
 - c. production value of broadcast
 - d. the public interest value of stories covered
 - e. original, in-depth, enterprise reporting?
 - f. neutrality and impartiality
 8. Which Bosnian media are doing the highest quality journalism?
 9. What are the most successful examples of donor-supported journalism in Bosnia?
 10. What are the most urgent needs of the Bosnian media sector?
 - a. insufficient income
 - b. low development of professional journalism skills
 - c. lack of business and managerial competence
 - d. legal obstacles and government interference
 - e. political bias of coverage
 11. Addressing which of these needs could foreign donors such as USAID have the most impact over the next 5 years?
 12. Which kinds of needs are better addressed by foreign donors?
- Q2.** What types of assistance might be the most effective in those areas, and on what scale?
13. Which types of USAID assistance would be most effective?
 14. On which scale?
 15. Which specific projects would you recommend?
 16. What would they look like?
 17. Say you had \$1 million per year for five years to focus on any single media project, what would it be?
 18. Would funding a new high-quality internet TV news channel, distributed via web and mobile devices, be successful in Bosnia?
 19. Would investing in modern, professional equipment have a big impact?
 20. Would investing in mentoring/training for existing media have a big impact?
 21. Would making funds available to existing quality media, especially those reaching well-defined niche

audiences such as students, youth and veterans, have a big impact?

22. Would small grants to journalists who already produce high quality stories have a big impact?
23. Would establishing an obligatory media register, making detailed media ownership information transparent and accessible to the public, have a big impact on Bosnian media?
24. Would establishing and supporting a professional association of journalists, empowered to lobby for the rights, interests and standards of journalists, have a big impact on Bosnian media?

Q3. What are the comparative advantages of US assistance to media outlets?

25. Are there any types of assistance USAID would be better at providing than other international donors?
26. If so, what is the difference?
27. Does USAID have any comparative advantages over other donors, and if so, which?
28. Do you have anything to add?

THANK YOU!

ANNEX 4. TV, RADIO AND PRINT RATINGS IN BiH

(Sources: Audience Measurement, Fabrika Sarajevo, Mareco Index Bosnia)

TABLE 4.1. Average TV view per day (in minutes)

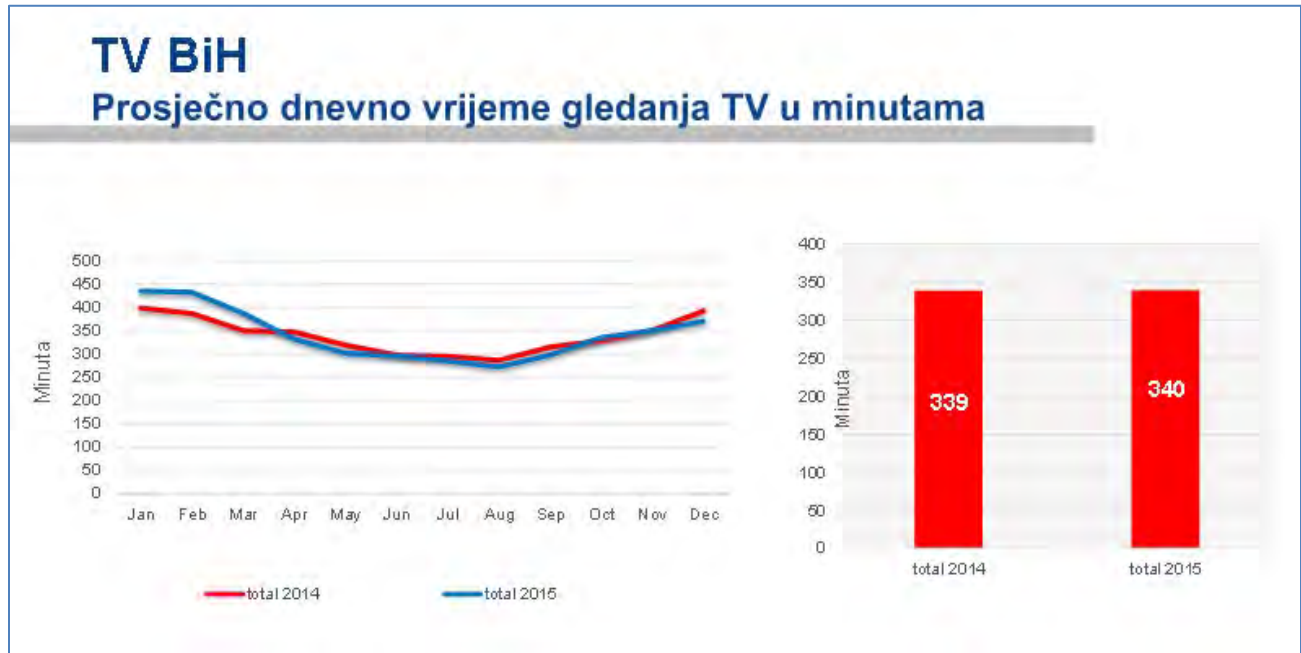


TABLE 4.2. TV audience share (2013-2016)

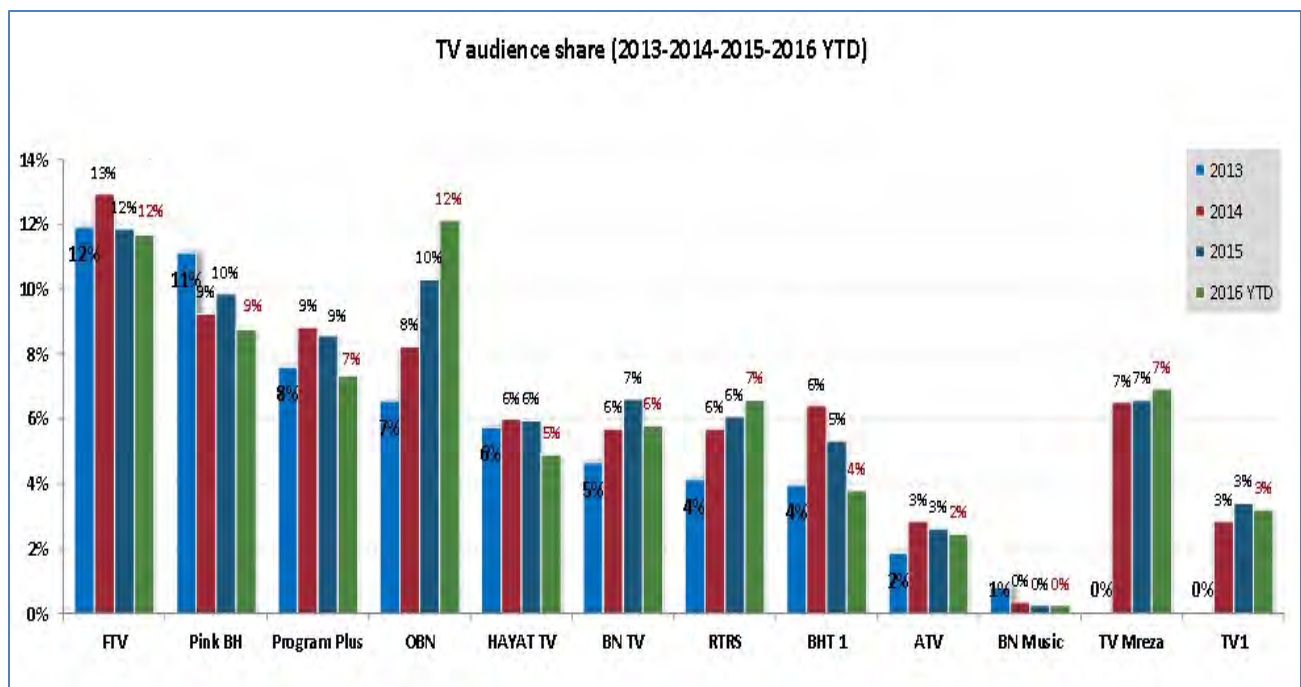


TABLE 4.3. TV audience share (2016)

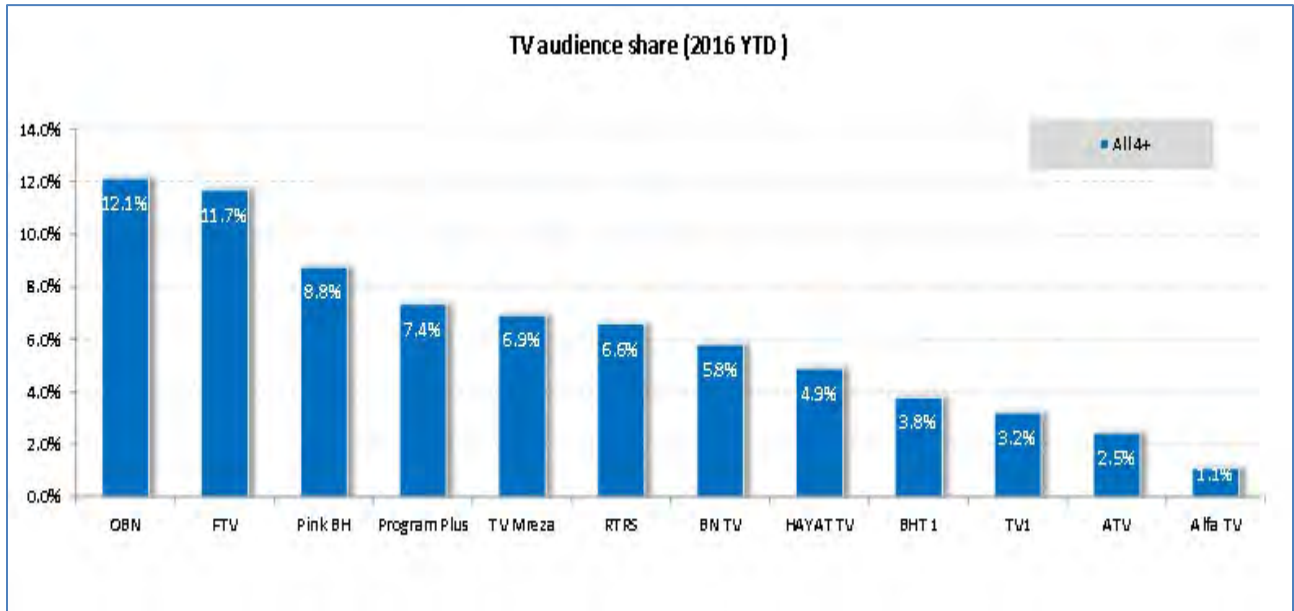


TABLE 4.4. TV audience share (comparison)

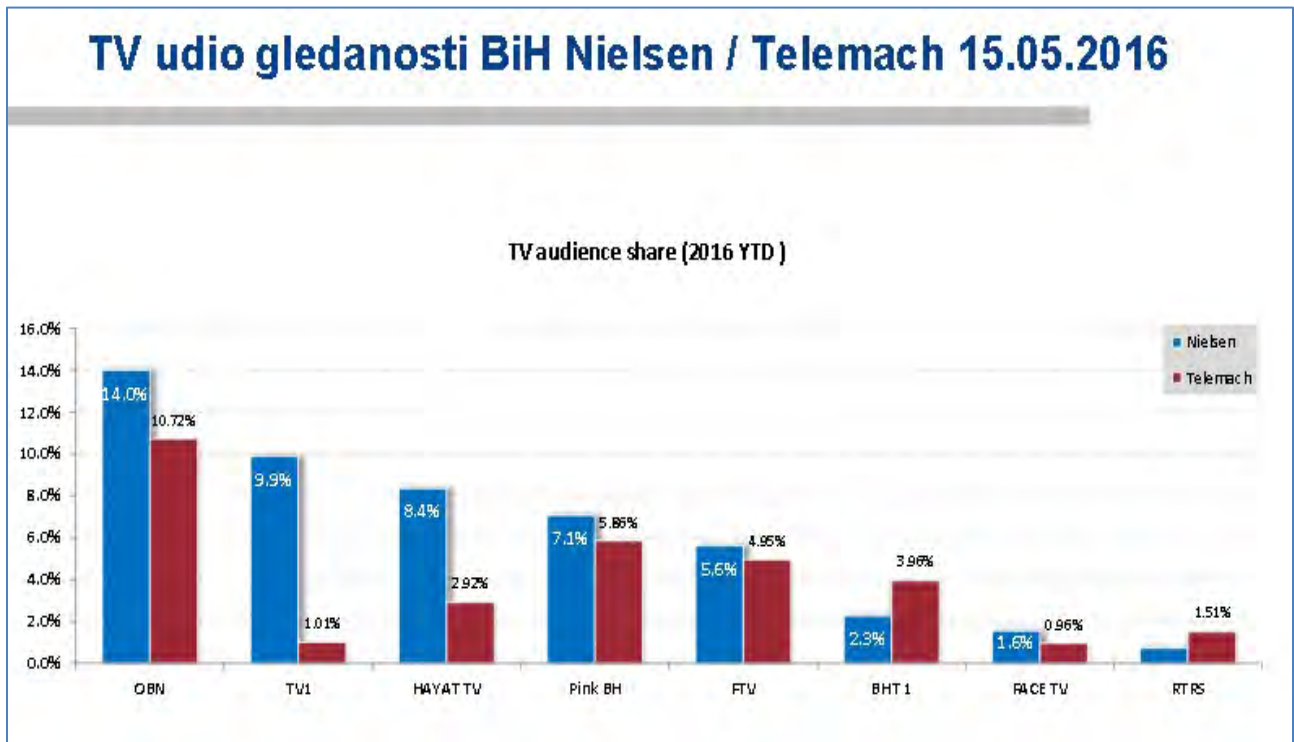


TABLE 4.5. Radio share

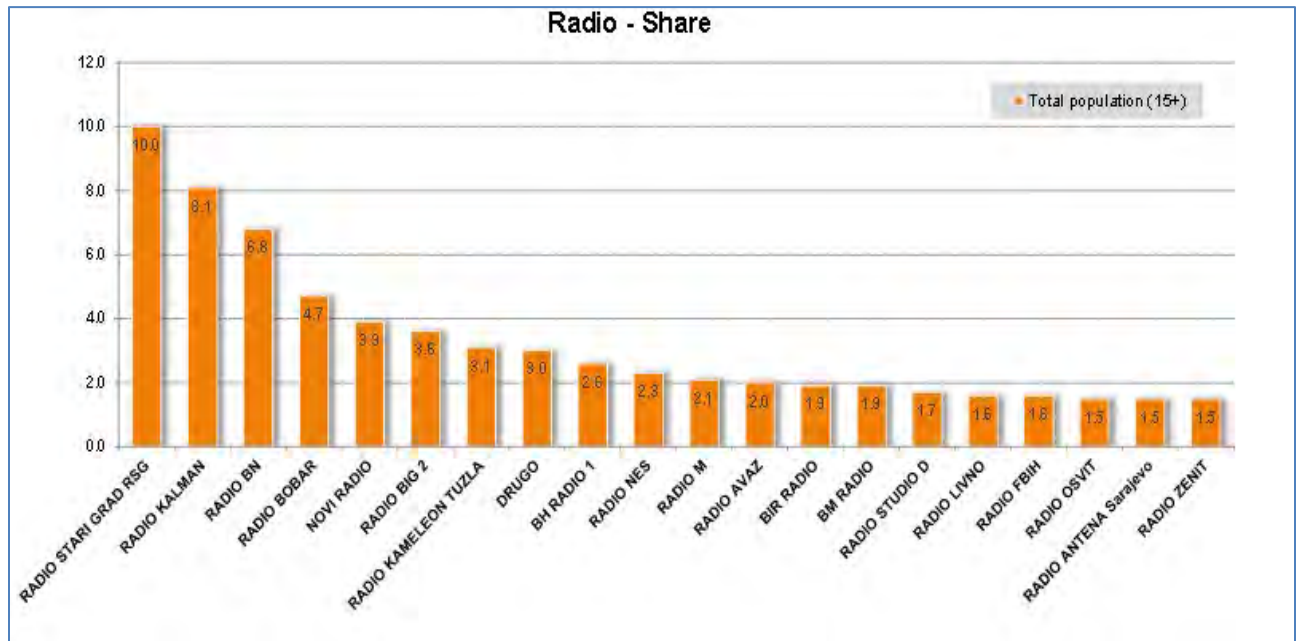
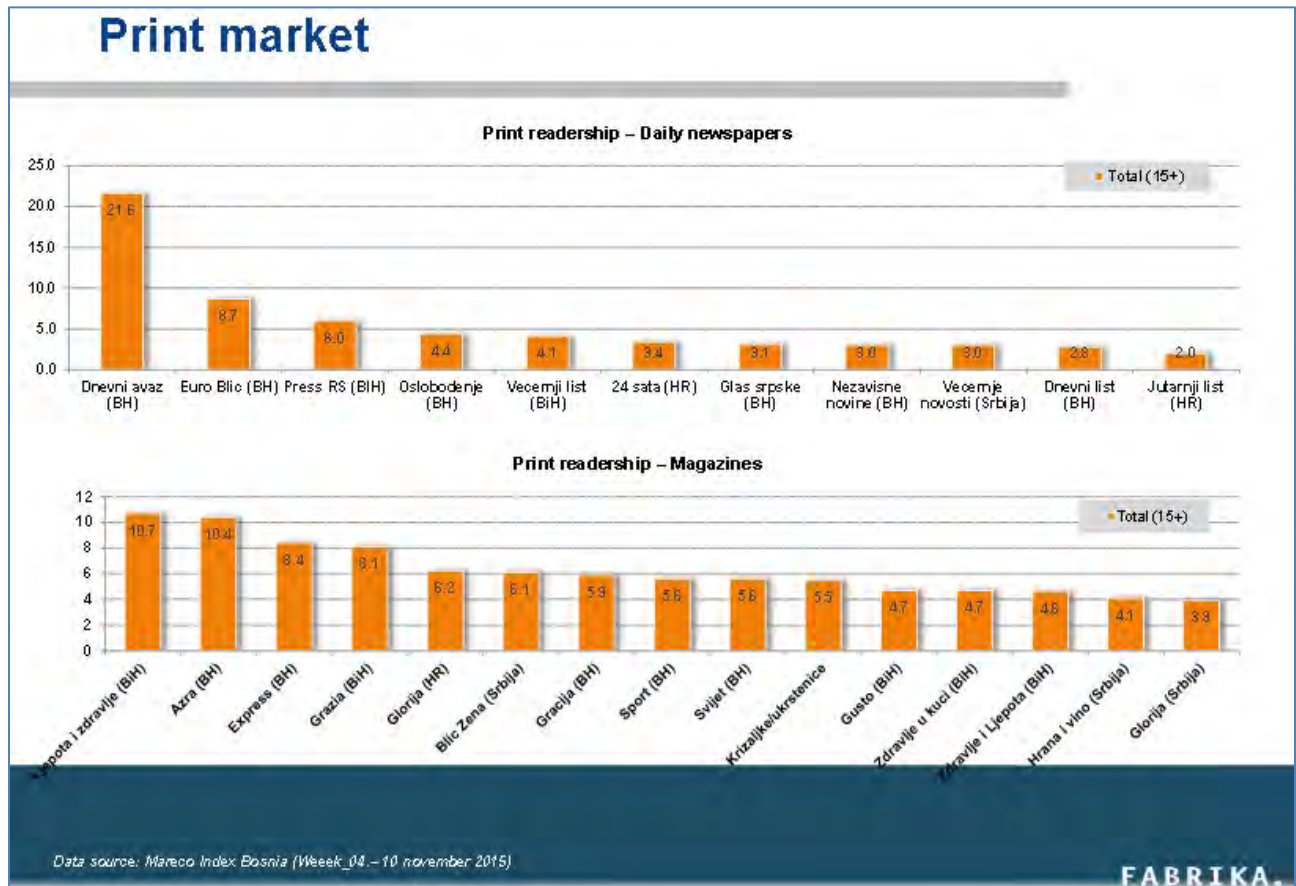


TABLE 4.6. Print readership



ANNEX 5. ONLINE MEDIA IN BiH

(Sources: Alexa)

| Top 10 web sites in BiH (all types) | |
|-------------------------------------|-----------------|
| No. | Web site - name |
| 1 | Google.ba |
| 2 | Facebook.com |
| 3 | Youtube.com |
| 4 | Google.com |
| 5 | Olx.ba |
| 6 | Klix.ba |
| 7 | Wikipedia.org |
| 8 | Yahoo.com |
| 9 | Instagram.com |
| 10 | Live.com |

| Top 10 news portals (all) | | |
|---------------------------|----------------------|--------------|
| No. | Web site - name | General rank |
| 1 | Klix.ba | 6 |
| 2 | Index.hr | 12 |
| 3 | Aljazeera.net | 13 |
| 4 | Avaz.ba | 14 |
| 5 | Blic.rs | 15 |
| 6 | Nezavisne.com | 21 |
| 7 | Kurir.rs | 22 |
| 8 | Jutarnji.hr | 27 |
| 9 | Telegraf.rs | 32 |
| 10 | Eksluziva.ba | 37 |

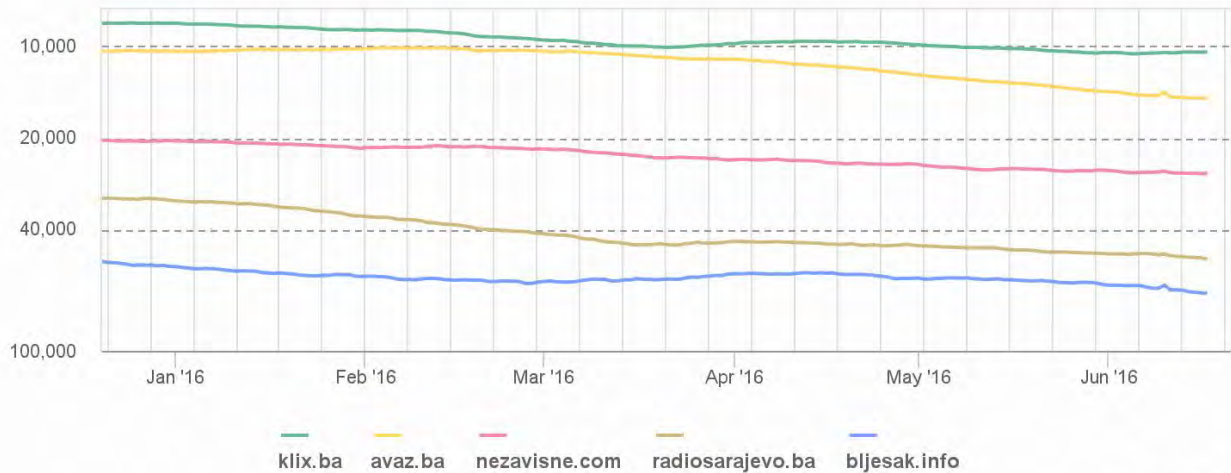
| Top 15 news portals in BiH | | |
|-----------------------------------|------------------------|---------------------|
| No. | Web site - name | General rank |
| 1 | Klix.ba | 6 |
| 2 | Avaz.ba | 14 |
| 3 | Nezavisne.com | 21 |
| 4 | Ekskluziva.ba | 37 |
| 5 | Radiosarajevo.ba | 53 |
| 6 | Bljesak.info | 60 |
| 7 | Krajina.ba | 74 |
| 8 | Novi.ba | 77 |
| 9 | Fokus.ba | 84 |
| 10 | Glassrpske.com | 114 |
| 11 | Oslobođenje.ba | 115 |
| 12 | Hayat.ba | 120 |
| 13 | Slobodna-bosna.ba | 131 |
| 14 | Prnjavorski.net | 143 |
| 15 | Tuzlanski.ba | 147 |

| Top 5 portals with proven excellence and collaboration with donors | | |
|---|------------------------|---------------------|
| No. | Web site - name | General rank |
| 1 | Radiosarajevo.ba | 53 |
| 2 | Bljesak.info | 60 |
| 3 | Slobodna-bosna.ba | 131 |
| 4 | 6yka.com | 148 |
| 5 | Depo.ba | 181 |

Highlights of top 5 sustainable news portals in BiH

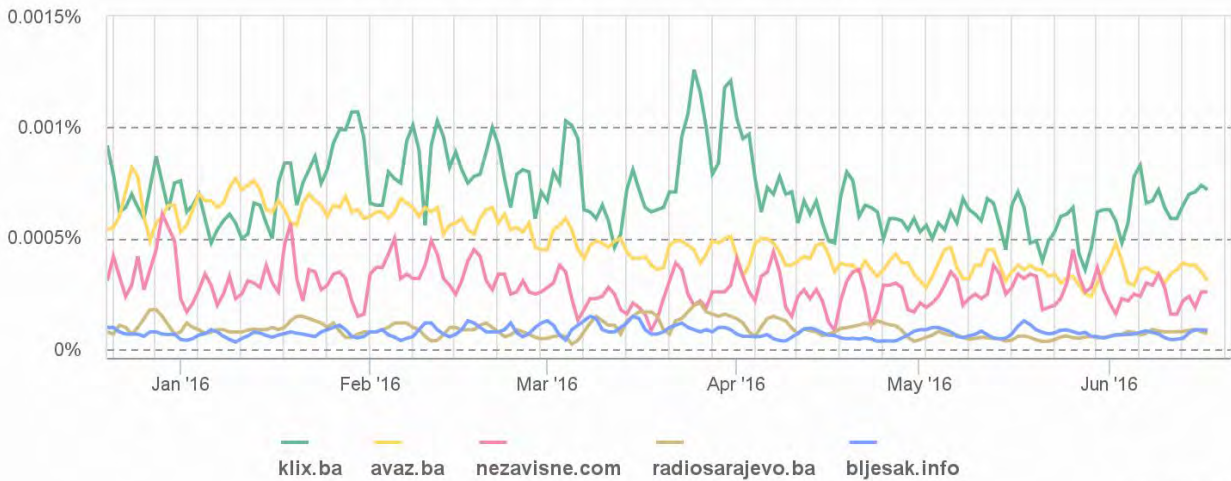
| Site | Global Rank | Rank in Country (BA) | Global Reach % | Global Pageviews % |
|------------------|---------------|----------------------|------------------|--------------------|
| klix.ba | 10,318 ▼311 | 6 | 0.00965% ▼2.31% | 0.000675% ▼16.13% |
| avaz.ba | 14,868 ▼4,066 | 14 | 0.00715% ▼26.42% | 0.000385% ▼39.61% |
| nezavisne.com | 26,058 ▼2,961 | 21 | 0.0037% ▼16.27% | 0.000261% ▼21.30% |
| radiosarajevo.ba | 50,003 ▼5,208 | 53 | 0.00213% ▼17.26% | 0.000088% ▼15.33% |
| bljesak.info | 64,481 ▼6,236 | 60 | 0.00154% ▼15.54% | 0.0000733% ▼17.89% |

Historical Traffic Trends: Alexa Traffic Rank



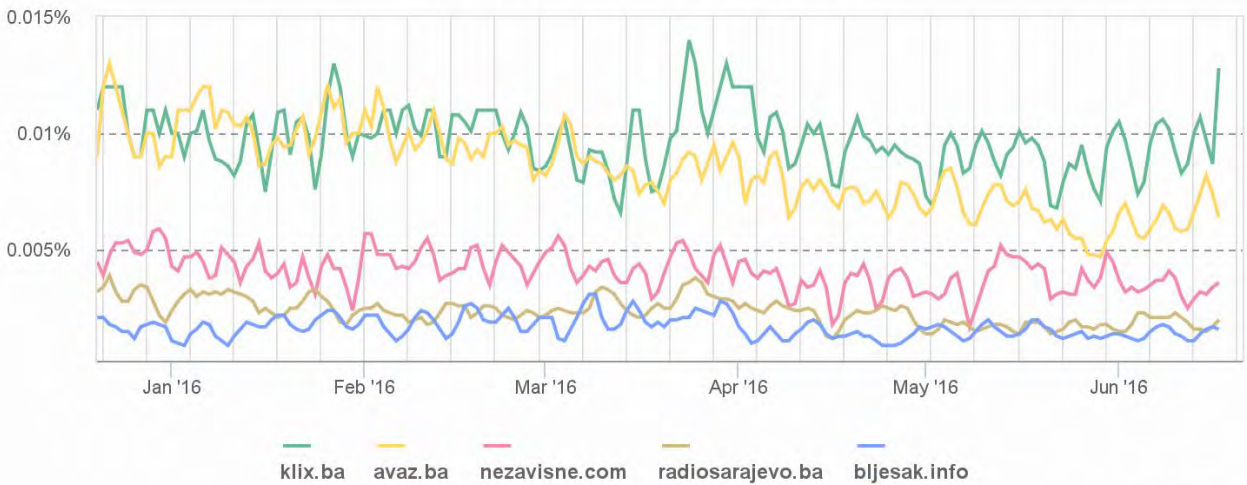
www.alexa.com

Historical Traffic Trends: Pageviews Percent



www.alexa.com

Historical Traffic Trends: Reach Percent

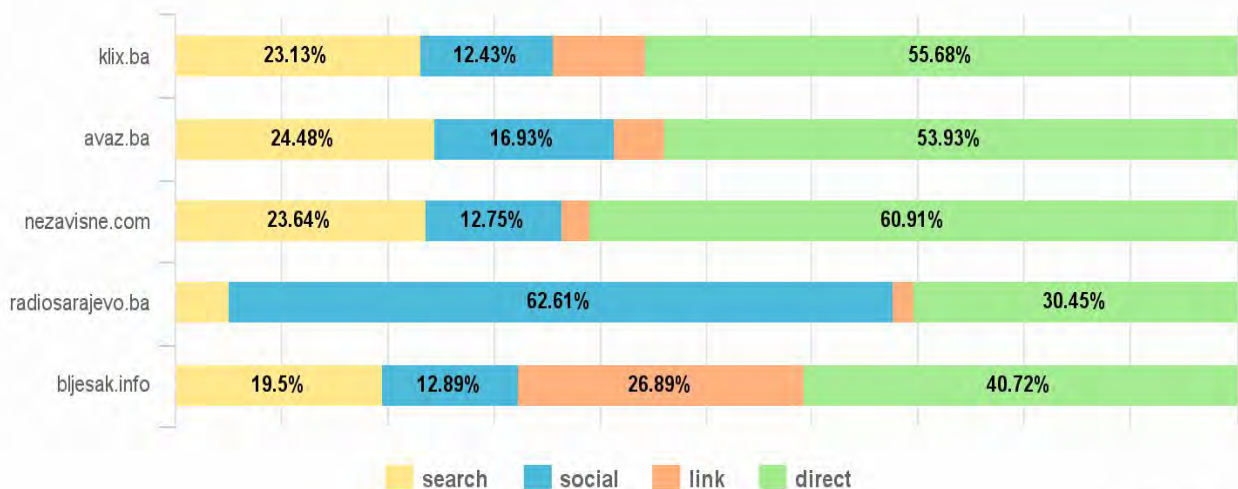


www.alexa.com

Traffic sources. Most than half of the visitors to Nezavisne (60,91 %), Klix (55,68 %) and Avaz (53,9%) comes directly to the web site using the browser or application. Radio Sarajevo in large amount (62,6 %) directs visits to the web portal through Facebook and other social networks, while Bljesak info is the most visited among these portal through direct links to the web page (26,9 %).

| Site | Search | Social | Link | Direct |
|------------------|--------|--------|--------|--------|
| nezavisne.com | 23.64% | 12.75% | 2.70% | 60.91% |
| klix.ba | 23.13% | 12.43% | 8.76% | 55.68% |
| avaz.ba | 24.48% | 16.93% | 4.65% | 53.93% |
| bljesak.info | 19.50% | 12.89% | 26.89% | 40.72% |
| radiosarajevo.ba | 5.10% | 62.61% | 1.84% | 30.45% |

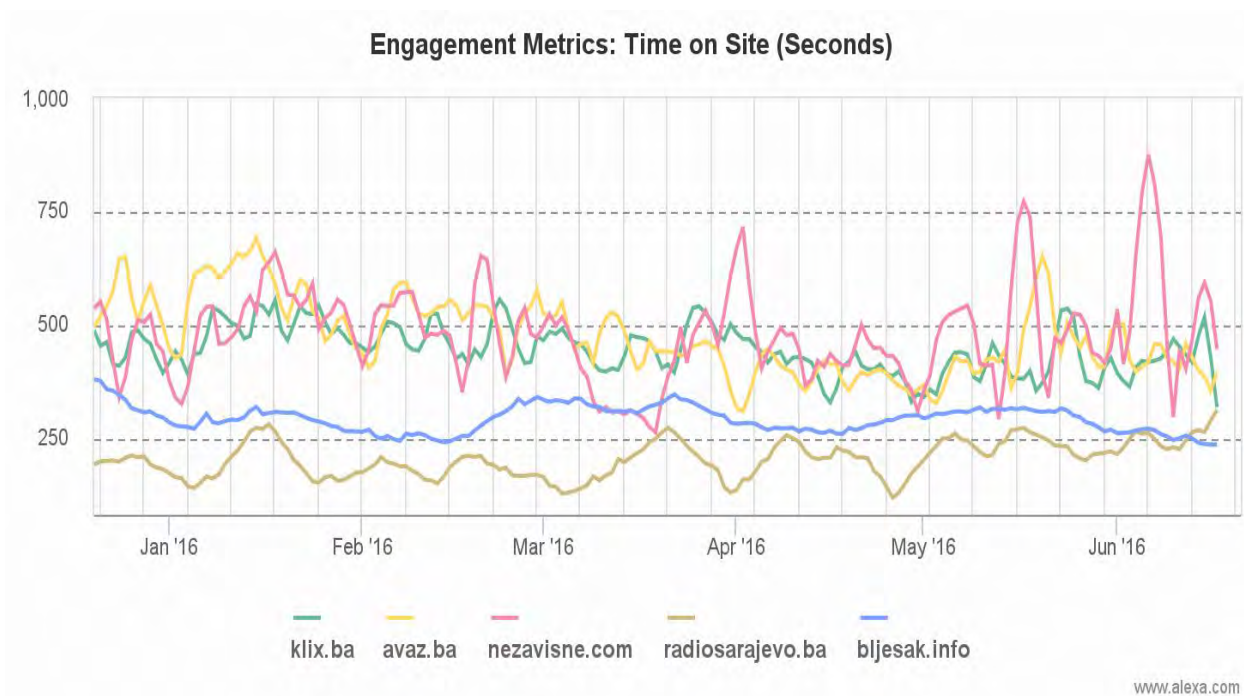
Traffic Sources



www.alexa.com

Pageviews, time on site, bounce rate. Nezavisne and Klix have the highest pageviews per user, while Nezavisne, Avaz and Klix visitors are staying longest at the web site (7-8 minutes per visitor). RadioSarajevo has the highest bounce rate meaning its visitors in 60 % cases are visiting only the page they are directed to, and not have the habit to browse for more information at the site.

| Site | Pageviews/User | Bounce Rate | Time on Site (minutes) |
|------------------|----------------|----------------|------------------------|
| nezavisne.com | 4.77 ▼6.10% | 37.50% ▲10.00% | 8:05 ▲3.00% |
| klix.ba | 4.74 ▼14.13% | 39.00% ▲17.00% | 6:48 ▼13.00% |
| avaz.ba | 3.65 ▼17.79% | 41.00% ▲13.00% | 6:59 ▼21.00% |
| bljesak.info | 3.22 ▼2.72% | 45.20% ▼8.00% | 4:46 ▼1.00% |
| radiosarajevo.ba | 2.80 ▲2.00% | 60.20% ▼8.00% | 3:45 ▲23.00% |



Web portals with niche orientation (investigative journalism, human rights)⁷⁷

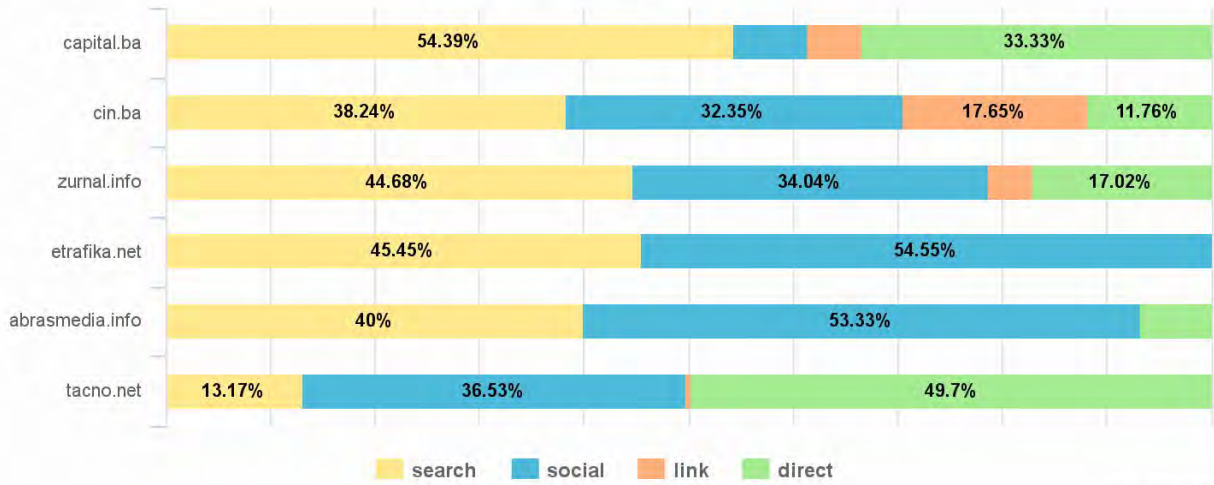
1. Capital.ba (677th in BiH)
2. Zurnal.info (884)
3. CIN.ba (935)
4. Tacno.net (1603)
5. eTrafika.net (no rank)
6. Abrasmedia.info (no rank)

| Site ↕ | Pageviews/User ▼ | Bounce Rate ↕ | Time on Site (minutes) ↕ |
|-----------------|------------------|----------------|--------------------------|
| capital.ba | 3.80 ▲120.00% | 49.20% ▼23.00% | 4:01 ▲87.00% |
| cin.ba | 3.40 | 37.50% | 4:54 |
| tacno.net | 2.03 ▲9.00% | 59.40% ▲1.00% | 3:56 ▲4.00% |
| zurnal.info | 1.60 | 70.80% | 2:14 |
| etrafika.net | 1.50 | 66.70% | 2:34 |
| abrasmedia.info | 1.10 | 91.30% | 1:52 |

| Site ↕ | Search ▼ | Social ↕ | Link ↕ | Direct ↕ |
|-----------------|----------|----------|--------|----------|
| capital.ba | 54.39% | 7.02% | 5.26% | 33.33% |
| etrafika.net | 45.45% | 54.55% | 0.00% | 0.00% |
| zurnal.info | 44.68% | 34.04% | 4.26% | 17.02% |
| abrasmedia.info | 40.00% | 53.33% | 0.00% | 6.67% |
| cin.ba | 38.24% | 32.35% | 17.65% | 11.76% |
| tacno.net | 13.17% | 36.53% | 0.60% | 49.70% |

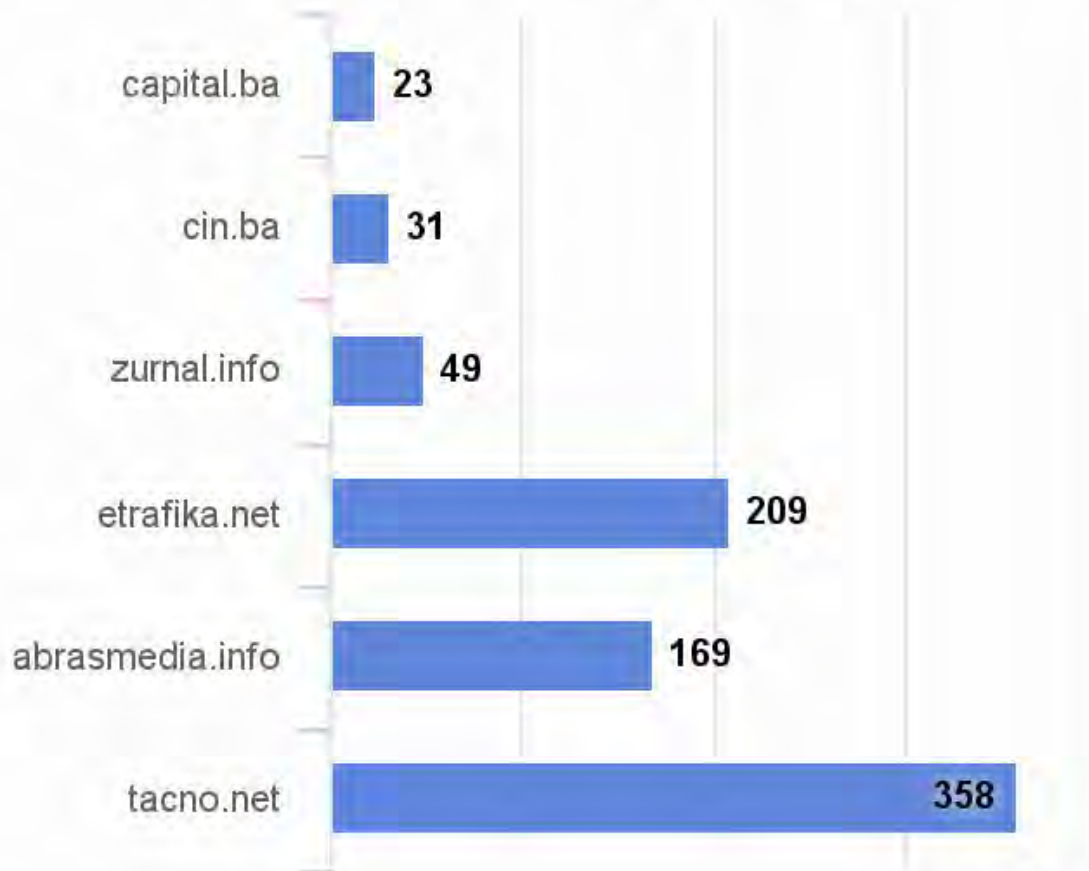
⁷⁷ Alexa.com, accessed on 20 June 2016

Traffic Sources



www.alexa.com

Facebook Shares (home page)



www.alexa.com