

Mid-Term Evaluation

Kosovo Media Assistance Program (KMAP)



Prepared for the International Research and Exchanges Board (IREX)

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ABBREVIATIONS

| | |
|-------------------|--|
| AI | Administrative Instruction |
| AMPEK | Independent Media Owners Assn. |
| APJK | Kosovo Professional Journalists Assn. |
| BIRN | Balkan Investigative Reporting Network |
| COP | Chief of Party |
| E-goal | Evaluation Goal |
| EPS | Euros Per Second |
| EU | European Union |
| GIMEK | General Industry Committee of Electronic Media in Kosovo |
| IMC | Independent Media Commission |
| IR | Intermediate Result |
| JIC | Joint Industry Committee (Old name for GIMEK) |
| K/Serb | Kosovar Serb |
| KIJAC | Kosovo Institute of Journalism and Communication |
| KMAP | Kosovo Media Assistance Program |
| KTA | Kosovo Trust Authority |
| KTTN | Kosovo Terrestrial Transmission Network |
| KTV or Kohavision | Independent Kosovo-wide TV station |
| LAOD | Law on Access to Official Documents |
| LLC | Limited Liability Company |
| MMF | Minority Media Fund |
| MSI | Media Sustainability Index |
| NGO | Non-Governmental Organization |
| OSCE | Organization for Security and Cooperation in Europe |
| PDP | Professional Development Plan |
| PMP | Performance Monitoring Plan |
| PTK | Post and Telecomm Kosovo |
| RFP | Request for Proposals |
| RTK | Radio Television Kosovo - Public broadcaster |
| RTV21 | Independent Kosovo-wide TV station |
| SON Waiver | Source, Origin, Nationality Waiver |
| TA | Technical Assistance |
| TOR | Terms of Reference |
| USAID | US Agency for International Development |

Mid Term Evaluation: Kosovo Media Assistance Program (KMAP)

Executive Summary

KMAP is a successful project. Independent broadcast stations assisted by the project are making progress towards sustainability, even though they are still quite vulnerable to market fluctuations. Training is well received at most levels and is having a discernable impact on performance. KMAP is successfully collaborating with other USAID projects to provide special subject matter training to both print and electronic media journalists. Outreach to local radio and TV (partner) stations, both Kosovar Serb (K/Serb) and Kosovar Albanian, has been having a positive impact on business management and programming. KMAP has an effective staff and highly qualified leadership, seemingly well regarded by the media and journalists and appreciated by USAID. The Project has a well structured Performance Monitoring Plan (PMP) with solid indicators moving in the right direction. Reporting is kept current so it was easy to track results and issues.

In further progress, KMAP has supported audience research to improve marketing of broadcast advertising, and sponsorship of this research has been transferred to an NGO, GIMEK, which represents the broadcast industry and which now commissions its own audience surveys. KMAP has assisted a USAID supported microwave transmission network (KTTN) as it transitions to a private company and moves towards self sufficiency. The project has monitored and advised on the developing legal and regulatory environment for media during this pivotal period when the Independent Media Commission (IMC) is taking over regulation of broadcast media. The two KMAP supported media associations, AMPEK (independent media owners) and APJK (journalists) are functioning actively, providing services, and with recent completion of KMAP financial support have found alternative sources of funding. KMAP continues to work with these associations on legal issues.

Regarding inter-ethnic relations in Kosovo, KMAP has gathered significant experience working with local K/Serb media – in its local partner program; as grant recipients in its Incentive Grant program; and as participants in open training programs that are attended by journalists from all ethnic groups.

Holding back achievement of full potential for KMAP are the weak economy and the uncertainty surrounding status, both of which affect the viability of the media-related businesses at the center of the KMAP project. A stable economic and political environment could enable economic growth that would solidify the gains made.

Key Recommendations

Recommendations are set out in full at the end of the discussion of each E-goal. Following is a summary of key recommendations.

IR 1: Increased Business Viability of Targeted Media Outlets

- Drop the unattainable requirement for Professional Development Plans (PDPs) for the business managers at KTV and RTV 21 in light of the ongoing quarterly business reviews and the associated coaching.
- Explore involvement of USAID or US Office officials to help break the deadlock on KTA and other issues delaying privatization of the media center.

- Capture experience from two years working with local media partners in a short, succinct, simple and practical guide to the business side of operating a small local media outlet – licensing and legal requirements, accounting and tax requirements, sales and marketing. Prepare guide in both Albanian and Serbian.

IR 2: Improved News Content of Media Practitioners and Broadcasters

- Think “out of the box” about ways to convince the senior editor level at KTV and RTV 21 that the news can be greatly improved if they change their approach and fully implement KMAP recommendations, exploiting the skills their journalists and cameramen have acquired through KMAP training and coaching.
- Consider activities that will help partner stations maintain skill levels in the face of heavy turnover, perhaps further distributing the Reuters manual for training new personnel and exploring possible support from other journalism centers in Kosovo.
- Journalists and mid-level editors have requests and suggestions regarding future training. KMAP should see what among these it can factor into future KMAP training cycles.

IR 3: Improved Legal and Regulatory Framework for Media

- Continue to support fair and transparent broadcast licensing and regulation; as appropriate, cooperate with AMPEK and provide legal assistance to IMC in support of this objective. Monitor development and implementation of laws and regulations concerning RTK, including management of Minority Media Fund.
- Promote a legal and regulatory environment that supports and protects free speech rights of all media and journalists; as appropriate, cooperate with APJK in pursuit of this objective.

IR 4: Professional Associations Represent Media and Journalists’ Interests Effectively

- Continue providing on-demand TA to AMPEK and APJK in support of their advocacy role, but provide this TA under IR 3, Improved Legal and Regulatory Framework. Continue to involve APJK members in training activities carried out under IR2. Terminate activities under IR 4, including all reporting requirements under IR 4.

Cross-cutting: Increased Effectiveness of Kosovar Serb Media As A Voice for the Serb Community

- In consultation with USAID, expand work with K/Serb stations, with the objective of creating a sustainable network or otherwise making Kosovar-oriented Serb media available in all K/Serb communities. Use achievements and lessons learned in working with small media outlets in the first half of KMAP.

Grants

- Review the chain of approvals needed in the grant process, find what circumstances have caused unreasonable delay, and if the cause is within IREX control, make appropriate changes.

Purpose and Output of the Evaluation

The main purpose of this mid-term evaluation is to develop practical recommendations for program improvement aimed at consolidating program results during the second half of KMAP. For this purpose, the Team was asked to address ten Evaluation Goals (E-goals) set out in the Terms of Reference (TOR), and two additional goals that were added at the request of COP Andrew Clayton. The twelve E-goals are addressed sequentially below.

As directed in the TOR, the evaluation approach was collaborative and qualitative, using key informant interviews, group interviews and document review to identify and build on existing program strengths and to understand challenges. See Attachment 1, Schedule for Evaluation, which sets out the interview schedule. The evaluation suggests programmatic recalibrations appropriate at the midpoint of the project, and provides some suggestions for addressing the particular challenges of the KMAP program. In addition, the evaluation team identifies and highlights KMAP success stories.

Specific Evaluation Goals for IR 1: Increased Business Viability of Targeted Media Outlets

Evaluation Goal 1: To assess the extent to which the national private broadcasters are becoming financially viable businesses. IR1.1

Progress to date

In 2004, USAID's Media Assessment commented that independent broadcasters were complacent, depending heavily on donor support, and lacking incentive to improve commercial viability.¹ This situation has changed. The two independent television stations, RTV 21 and KTV, are on the brink of financial viability, although they remain vulnerable to fluctuations in the market for video advertising, such as occurred in the latter half of 2006.

In support of financial viability, KMAP has:

- Worked with each station to improve understanding of the market for broadcast advertising and the relationship between programming, viewership, demographics and revenues and to convince broadcasters (especially KTV, which was quite resistant) of the value of market research. KMAP business consultants have helped the stations analyze the data provided by market surveys and used the data in support of advertising sales. These consultants have also advised the stations on how to schedule programming to strengthen advertiser appeal.
- Conducted quarterly business reviews with the executive directors at each station that include detailed analysis of financial operating results, as well as discussions of business development, plant and premises, grant implementation and professional staff development. The discussions have included advice on human resource management, which is weak at both stations, particularly RTV 21.

¹ Media Assessment at p.18

➤ Advised on acquisition of new premises. Both independent broadcasters have an interest in expanded studio facilities and additional office space. This is particularly urgent for KTV – its present cramped quarters do not provide adequate space for good quality production, and this is holding back progress on news and programming. KMAP facilitated the formation of a consortium of independent media led by RTV 21 and KTV to buy a building known as the Media House Annex. Before the consortium can bid on the building, the KTA has to prepare to privatize it, and before that can happen, the municipality needs to parcelize the underlying land. The process has stalled at the municipal level. This has created uncertainty for both broadcasters, since they do not know whether, or when, they can acquire the building.

➤ Provided professional development and leadership training to business managers through the quarterly business reviews described above, and individual coaching to those business managers willing to receive such coaching. In addition, KMAP will conduct leadership training for women in management positions in media companies. Formal Professional Development Plans for key business managers, although anticipated in MOUs with the stations and in the work plans, have not been developed.

➤ Made grants for equipment purchase. These Directed Grants (see discussion under E-goal 12 below) are an integral part of the assistance program. KMAP has supported the broadcasters in the grant process through acquisition planning, grant application, grant approval and the acquisition process.

Issues

Media Sustainability Index

The stations' progress towards business viability is measured first by Kosovo's score on Objective 4 (Business Management) in the Media Sustainability Index, which was 2.21 out of 4 in December 2005. The score rose to 2.5 on the December 2006 MSI, a rise of just under 0.3 points. The goal, as set out in the USAID/KMAP contract, is to increase this score to 3 out of 4. It will be challenging to achieve a gain of 0.5 points in the second half of the contract, particularly if economic conditions do not improve. But this still seems a reasonable goal.

Financial Indicators

Progress towards viability is also measured by three financial indicators, (1) increase in revenue derived from advertising; (2) increase in EPS (Euros Per Second) rates for advertising; and (3) improvement in balance between revenues and expenditures. Both independent broadcasters did well on these indicators in the first year of KMAP (mid 2005 to mid 2006), becoming profitable enterprises able to cover their monthly costs through advertising and subscription revenues. However, in the second half of 2006 both stations saw a sharp fall in advertising revenues, resulting in a deterioration of all three indicators on a year-over-year basis.

What the Indicators Show.

Looking first at the advertising revenues for 2006, these show a gain over revenues for 2004, even though they are lower than revenues for 2005:

Advertising revenues (in thousands of Euros, rounded)

| | 2004 | 2005 | 2006 |
|--------|-------------|-------------|-------------|
| KTV | 1,055 | 1,418 | 1,174 |
| RTV 21 | 1,371 | 1,484 | 1,479 |

EPS rates for 2006 fell from 2005 levels, and failed to reach the 2006 target.

EPS rates (in Euros)

| | 2005 | Target for 2006 | 2006 |
|--------|------|-----------------|------|
| KTV | 3.20 | 4.00 | 3.00 |
| RTV 21 | 3.29 | 4.00 | 3.20 |

Similarly, the balance between revenues and expenditures fell (quite drastically for KTV), and the stations failed to reach the 2006 target.

Balance between revenues and expenditures (in Euros)

| | 2005 | Target for 2006 | 2006 |
|--------|---------|-----------------|----------|
| KTV | 78,744 | 5% increase | (31,093) |
| RTV 21 | 100,752 | 5% increase | 83,844 |

In the fourth quarter of 2006, revenues showed a slight improvement over results for the same time period in 2005. Nonetheless, these figures raise the issue of whether the stations are indeed on course to become viable businesses.

Why the deterioration?

KMAP's business review with each station disclosed a number of factors relevant to the deterioration in the financial indicators.

- Post and Telecomm of Kosovo (PTK) stopped advertising in the summer and fall. The hiatus in advertising was due to a change of management and other issues at PTK, and affected both stations.
- Other advertising customers also cut advertising or did not increase it, making for a soft market.
- KTV may have lost advertising revenues to RTV 21, as KTV's average price for advertising in Euros per second was significantly higher in Q4 2006 than RTV 21's (3.20 for KTV versus 2.68 for RTV 21).
- Both stations expected sales of programming for distribution over German cable channels, but these sales did not develop as expected.
- Besides advertising revenue, RTV 21 has significant revenues from overseas sales of programming for distribution over satellite and cable systems. These revenues did not grow as expected in 2006.

Conclusion.

The Team concludes that the difficulties experienced in the latter part of 2006 reflect the immaturity and volatility of the media markets in Kosovo, and the fragility of the economy in the present unsettled political environment.

Future prospects.

In the short run, both stations expect improvements in advertising revenues in 2007.

- A competitive mobile phone license has just been awarded to the Kosmocell Consortium, led by Radio Dukagjini and Kujtesa. This is likely to generate substantial advertising as providers compete for market share.
- It is likely that PTK will resume advertising.
- With the launch of GIMEK-controlled audience research, both stations should be able to sell advertising space more effectively, using improved audience data (see discussion of GIMEK below).

In the longer run, the stations need the broader market for advertising that would come with a more vibrant economy and increased economic activity. They need to be less dependent on advertising from PTK and other government entities, since government as a major advertiser could exert political pressure (by providing or withholding advertising). They need to prepare for changes in the programming market and advertising market that are already coming with competition from new media (cable television and satellite television program services). This is further discussed under E-goal 8 below. In order to retain their position as the premier providers of locally based “national” programming, the broadcasters also need to think ahead to the expanded programming capacity that will come with a switch from analog to digital service.

Recommendations

- Continue quarterly business reviews as a primary tool for improved business management, and provide professional development training (like the KMAP Leadership Program) when opportunity presents. However, USAID should drop the requirement for PDPs for business managers. The Team believes that the purpose of such training is being at least partially fulfilled through the business reviews and associated coaching, and that it is unlikely that such plans could be developed and implemented effectively in the latter half of the program, particularly given the resistance of senior managers to training plans of this kind.
- Explore the question of whether KMAP or USAID or the US Office can facilitate resolution of the issues that are delaying privatization of the Media Center and are consequently imposing a major commercial uncertainty on the media coalition. This should be seen not as direct assistance to the media coalition (which may, in the end, not be the successful bidder), but rather as freeing market forces to resolve commercially damaging uncertainties in a critical sector of the economy.
- Encourage broadcasters to prepare for market inroads by cable television, even as they lobby for cable television regulation. Regulation will provide broadcasters with some immediate benefits in the form of guaranteed carriage and an assurance of program integrity,² but it will not prevent further development of cable service. Ultimately, locally available cable television service will impact the market for advertising on broadcast stations.

Evaluation Goal 2: To determine what capacity building assistance is needed to get KTTN more financially viable before the end of the project. ***IR1.2***

Progress to date

KMAP and its predecessor program have worked with KTTN to facilitate reorganization from a donor-supported entity and NGO to a self-sustaining private company. KMAP expected that KTTN would complete transition to an LLC during 2006 or in January 2007, but completion of

² Broadcasters need a guarantee of program integrity. Without such a guarantee, the cable provider can strip out programs or advertising from the broadcast programming and substitute programs or advertising of its own choice.

the turnover has been delayed till mid-2007, primarily because KTA has failed to deliver the 99 year leases for KTTN's landholdings (which have already been approved and paid for). KMAP grant assistance to KTTN will end in June 2007. The last grant will go to KTTN during its last six months as an NGO. KMAP has provided operational funds to KTTN through grants and has also paid for and overseen financial audits.

Even apart from the issue of the leases, the transition process is difficult, complex and time consuming. KMAP continues to work with KTTN to shepherd the process through to completion. KMAP COP Andrew Clayton attends KTTN board meetings as an observer, reviews KTTN's financial reports and records, and provides advice and counsel on business management, marketing and controlling expenses.

The performance indicator for KTTN's development towards sustainability is the balance between revenues (excluding donations) and expenses. The 2006 target was an increase of 5% in the balance between revenues and expenditures.

KTTN Revenue and Expenses (thousands of euros)

| | 2005 Q1 & Q2 | 2005 Q3 & Q4 | 2006 Q1 & Q2 | 2006 Q3 & Q4 |
|-----------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Revenue | 179 | 209 | 219 | 197 |
| Expenses | 263 | 246 | 263 | 268 |
| Rev as % of exp | 67% | 85% | 83% | 73% |
| Increase | -- | +18% | -2% | -10% |

After a healthy increase in the latter half of 2005, the indicator has declined. Progress on the revenue side was impaired in the latter half of 2006 by the loss of a major client (IPKO). Expenses have been relatively steady, with a slight growth in the last two quarters; actions are planned to reduce personnel costs, which, we have been told, are above justifiable levels. Marketing efforts have located some small new customers, but none of the size of IPKO.

The KTTN network is a valuable asset, and it is an achievement to leave it in private hands, with a competent executive director.³ USAID and KMAP deserve credit for this. But the KTTN board (which is basically a client board, consisting of representatives of the main users) has a difficult road ahead if it is to nurture a successful business and maintain control of this important asset. This is not to completely discount the possibility of other donor support; but such support, if it is forthcoming, is only a stop-gap solution.

Issues

Sustainability. Given the poor economic conditions in Kosovo, can the KTTN board raise revenues by finding additional customers for their transmission service (even if those customers are competitors), and/or by raising (and paying) the fees that they themselves will owe, and/or by reducing expenses? The new cellular telephone licensee in Kosovo, Kosmocell, will almost

³ The Executive Director, Arta Fetiu, has shown her financial acuity by locating errors in the Ernst and Young audit of KTTN's 2004 accounts (an audit that was done prior to her appointment).

certainly use the KTTN transmission network, since Radio Dukagjini, which is a member of the Kosmocell consortium, is on the KTTN board. It is possible that an expanded cellular market (with more licensees than the one additional license awarded this year) will result in new customers. Increased business activity would generate additional demands. But even with the best possible scenario (status concluded, an invigorated economy, more open competition in the telecomm market) KTTN will face difficult challenges in the years ahead.

Leases. A critical problem that KTTN needs to resolve is KTA's delay in delivering the 99 year leases for KTTN's landholdings. This has delayed the transition to an LLC, planned for January 2007, to mid-2007.

Digitization. Within the foreseeable future, KTTN needs to make considerable investments in equipment in order to convert from analog to digital transmission. This will generate additional financial demands which the owners will have to meet.

Recommendations

➤ KTTN's progress towards viability depends on three factors: increasing its client base, reducing its expenses and resolving lease issues with KTA. KMAP has advised, and should continue to advise, on all three of these issues. KMAP COP is addressing requests directly to KTA's legal department to see if this will resolve the lease issue; this pressure should be continued, and, if necessary, increased.

Evaluation Goal 3: To determine what capacity building assistance is needed to get GIMEK (formally called the JIC) more financially viable before the end of the project. IR1.4

Progress To Date

KMAP has:

- Facilitated the formalization and further development of a Joint Industry Council to sponsor audience research.
- Convinced the national broadcasters of the value of jointly sponsored audience research.
- Worked with potential JIC members to develop an organizational structure, elect a board, and establish criteria for future audience research.
- Overseen choice of a new quarterly marketing research company and provided grant funds to cover a portion of the cost of the new research products. Partial funding of the product through a KMAP grant will continue in year three of KMAP.

JIC members have taken ownership of the enterprise, approved a charter for the committee and changed its name to the General Industry Committee of the Electronic Media in Kosovo (GIMEK). Given the suspicion and hostility that JIC members had occasionally expressed in the past towards the concept and results of third party audience research, this represents a real achievement. Since then, in Q4 2006, GIMEK commissioned and distributed its first diary-based audience research survey. The second such survey is planned for late February 2007.

Issues

GIMEK has a client board, that is, board members are mostly users and purchasers of the GIMEK product. GIMEK's future viability depends on the commitment of board members to continue to cooperate in commissioning the survey, to maintain a professional relationship with the survey

company, to support the survey even when they don't like the results, to pay for it, and, if GIMEK runs at a loss, to support the organization until it is able to achieve profitable operation.

Profitability depends on the vigor with which the product is marketed, and on the health of the Kosovo economy. Poor economic conditions will limit the market for the GIMEK product.

KMAP has plans to work with GIMEK in developing a strategic plan to broaden the membership base through public relations and marketing endeavors, to advise on business management and on hiring a part-time or full-time executive director. KMAP, or KMAP and GIMEK working together, plan to facilitate workshops so that local media and ad agencies have a better understanding of the market research.

Recommendations

➤ Continue to implement the activities set out in the Y2 Workplan and work towards the milestones set out in the PMP. The Team has no reason to question the wisdom of this ongoing approach.

Evaluation Goal 4: To determine what general capacity building assistance potentially could be provided at low cost and with limited effort to get local media outlets more financially viable before the end of the project. IR1.3

Progress to date

There is an abundance of local broadcast media in Kosovo, both radio and television, some very small indeed, with minimal equipment and little or no locally-based or original programming. We have been told that the IMC believes there are too many local broadcasters. The IMC may choose to impose a licensing regime that will result in closure of some of the least viable stations.

After issuing an RFP, KMAP selected about a dozen regional and local broadcasters as local media partners, choosing those with links to their local communities (through locally produced programming and/or strong audience appeal) and commitment to building their companies. The companies are listed in Attachment 2, KMAP Local Media Partner Development Group. KMAP business and legal advisers worked with owners and managers at each partner station, developing their book-keeping and managerial skills, helping them with their business planning, ensuring their compliance with Kosovo wide regulations and training their advertising sales staff (though not all had such staff). Progress of local stations has been measured through use of a KMAP-developed Media Partner Assessment Tool.

Some of these local stations are or have become sustainable. For instance, Radio Alba, Radio Dodona, Radio Vala Linore and Radio Peja are said to be sustainable. But in many municipalities where local stations operate, unemployment is high and there is not much economic activity capable of supporting an advertising budget; consequently, advertising revenues are scarce. Placement of ads and programming from organizations such as KFOR and OSCE has sustained some of these local stations, but that is due to end soon.

Issues

Working with local media partners is intended to advance IR 1 through increasing business viability of local media. The progress shown by the local partners in business management, financial reporting and sales and marketing has been modest, but the work with those partners has provided valuable lessons on business issues common to these very small stations. Before closing out this activity, KMAP should capture the resource by producing a manual on small

station business management, designed to help other small stations launch and survive on a sound business footing.

Recommendation

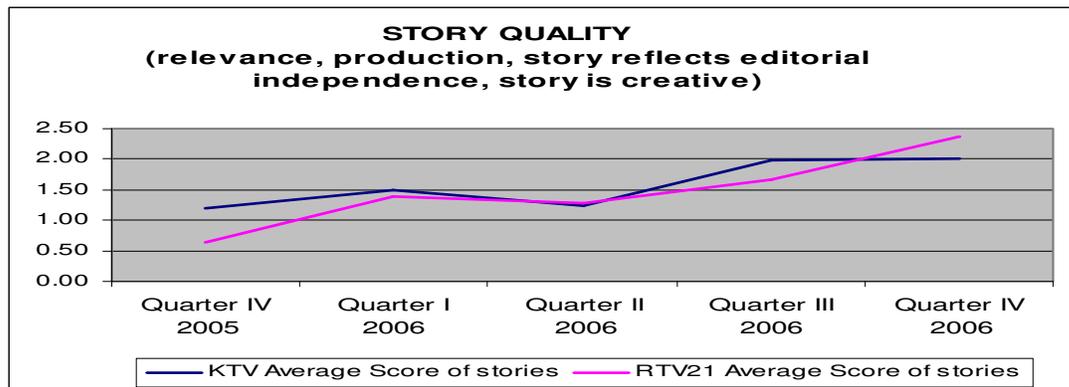
- Capture experience from two years working with local media partners in a short, succinct, simple and practical guide to the business side of operating a small local media outlet, including licensing, legal requirements, accounting and tax requirements, sales and marketing. Prepare Albanian and Serbian language versions of the manual. After KMAP ends, the manual could be turned over to the IMC as a consumer guide for aspiring station owners.

Specific Evaluation Goals for IR 2: Improved News Content of Media Practitioners and Broadcasters

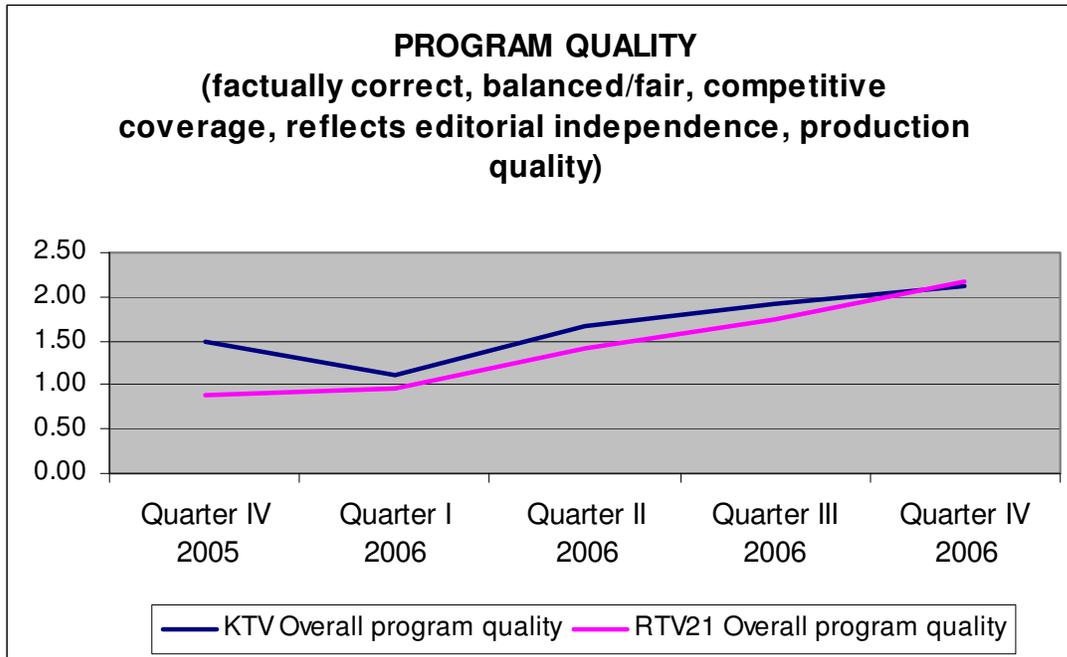
Evaluation Goal 5: To assess the extent to which KMAP technical assistance is helping to raise professional standards of media content among the two national broadcasters. IR 2.1

Progress to date

The data show that professional standards of media content have improved and are being reflected in broadcast programming. We plotted quarterly average KMAP program content scores from the beginning of the project through 2006 and the trend clearly is up (see graphs below on program and story quality). In visits to both RTV21 and KTV, the Team found that editors and journalists were full of praise for the training and on the job instruction and coaching they had received from KMAP. This covered the full range of approaches and they were especially pleased with the training on story planning and collaborative journalist and cameraman work. Our interview findings were consistent with the post training empirical analysis done by Maureen Taylor in October 2006. We had expected some decay in training impact but were assured this had not occurred with those who remain at the stations.⁴



⁴ In addition to the interviews at the stations, we interviewed two other journalists who had been involved in training and followed the interviews by having them fill out a questionnaire with some of the same questions posed by Maureen Taylor earlier. Most questions were rated 10 on a scale of 10 with none less than a 9.



Source: KMAP has done a content analysis of RTV 21's and KTV's news bulletins on approximately a weekly basis examining and scoring standard elements set out in the Performance Monitoring Plan. The evaluation team observed this process and concluded that it was being applied with the utmost professional care and integrity and had built in appropriate checks and balances.

The two stations do have different approaches to the news. KTV is much more likely to take on the establishment and go for stories with controversial content. This is policy that comes straight from the top. RTV21, also reflecting top management's perspective, deliberately avoids news items that "rock the boat." The feeling there is that this is not the time to be making enemies in officialdom.

Comparison. The graphs above show a steady improvement and a more consistent quality in both stations since the intensive training program began at the end of March 2006. Moreover, both exceeded targets in the most recent quarter.

It may be too early to make a great deal of the relative performance of the two stations, but it does appear that RTV21 is exceeding KTV in both program and story quality. This could be a function of the space and equipment constraints on KTV. As noted, it is crammed into a remarkably small space and presumably for this reason has been reluctant to draw down on KMAP equipment grants. This reluctance recently was turned around and KTV editors informed us that they will soon be implementing everything KMAP has recommended and trained them for, apart from the planning desk, for which all agree there simply is not room in their present quarters. So, again, it will be interesting to see if the relative performance reflects this commitment over the coming months.

Issues

Turnover. Except for a loyal core, turnover at both stations, especially RTV 21, is fairly high, meaning that some of the new skills development is lost to the stations. Turnover is almost always a question of better money opportunities in other fields, we were told. However, employee morale is a contributing factor -- it tends to be higher at KTV than at RTV 21. The

owner there has been advised repeatedly that human resource policies need revision, but to date that advice has not been heeded.

Skill levels-production gap. At both stations we heard that thanks to the training journalists have received from KMAP, their skill levels are much higher than the improved programming and broadcasts reveal. KTV personnel said they are constrained in applying all they learn by lack of space,⁵ and at both KTV and RTV 21, reporters noted a lack of enough cameramen (and cameras) to team up cameramen with journalist as much as they would like and have the know how to accomplish.

Matt Shelley said that especially at RTV 21, which has drawn down substantially on KMAP equipment grants, the equipment shortage was overrated though it is true enough at KTV which has just started to draw down the grants. He noted that another and perhaps more significant reason for the gap in both stations is the resistance of senior editors to external advice so that journalists are unable to apply fully all that they have learned from KMAP.

The big problem here seems to be the reluctance of senior editors to change their ways significantly and take full advantage of their now much improved staff. KMAP has skillfully used a mix of on the job, hands on and small group training to reach busy journalists and mid and lower level editors. The dilemma is how to break through to the more senior levels and induce needed change. Some success has been achieved through international study tours. We have no easy solutions to recommend.

Recommendations

➤ The bottom line is that this project could produce even better results journalistically if somehow KMAP could figure out a way of influencing the senior editors of KTV and RTV 21. Some thinking out of the box might lead to results. For example, it may be worth meeting with other USAID project trainers to see what is working in other contexts to get through to the upper echelons, e.g., the mayors and executive directors in the LGI project. Another possibility might be to arrange a couple of high level luncheon meetings with USAID Director Michael Farbman and/or Chief of Mission Tina Kaidanow with the editors and/or owners in which they would be asked to make a presentation on the new approaches they are planning to implement in their network news programs. This might precipitate commitment to make the needed changes.

⁵ KTV is situated in an incredibly tight space which is one reason it has delayed drawdown of its scheduled grants for equipment. If it is able to move into the new "Media Center" this problem will be resolved. Anticipating this move, KTV has started to draw down the grants and order equipment.

Evaluation Goal 6: To assess the extent to which KMAP technical assistance is helping to raise professional standards of media content among local partner stations and Kosovar journalists in general. IR2.2

Background

With respect to partner stations, it should be noted that the conditions under which they operate are much more difficult than what the national stations experience, though neither set have an easy time. They have a much thinner advertising market, less donor support and less reliable infrastructure such as heat and electricity (power failures or blackouts are not rare). Moreover with some 118 electronic media outlets (93 radio, 25 TV),⁶ there is considerable competition in some markets. Reportedly, copyright and intellectual property laws are widely ignored, and much programming is carried without authorization.

Progress to date

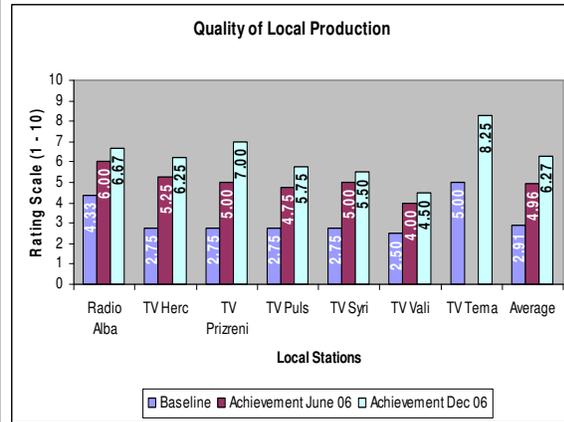
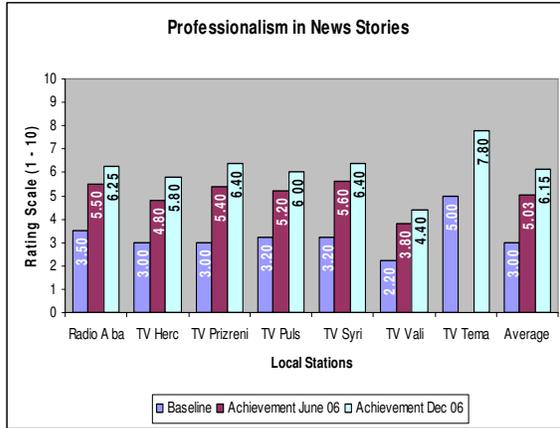
In spite of these constraints, there have been improvements in journalistic standards across the board among partners though much more so in some of the partners than in others (see latest KMAP graph on this point below). The Team visited two TV Stations (one Serb) and one radio station. At all three, the journalistic training received from KMAP was very much appreciated and it was reported to be in use – a fact which is backed by the KMAP empirical evidence showing a steady increase in professionalism from a baseline of 3.00 in December 2005 to 6.15 in 2006. Program quality went from a baseline of 2.91 to 6.27 over the same period. Below are relevant quotes from each station visited.

TV Herc: We still use all the materials Avni [Ahmetaj, KMAP Media Adviser] provided for us during training. It was great training, and our journalists now use it as a model. Now we're applying it to documentaries and news stories. The training most appreciated was how to plan the news, improved camera work and how journalists and cameramen can work together.

TV Tema: Avni's training was very useful – our best shot at improving. Note: TV Tema is training its new people in the skills Avni brought to that station in intensive training last fall.

Radio Alba: Biggest help to our station. From our first contact with KMAP they touched very sensitive issues on how a journalist should function. The incentive grant helped us do a series on democratization and the rights and role of women in society.

⁶ OSCE, "The State of Media Freedom in Kosovo: Observations and Recommendations" July 3, 2006



Support to regional stations is justified. They are helpful in keeping communities apprised of local and regional issues and giving voice to citizens. One US resident of a village an hour outside of Kosovo remarked at how important the local radio station is to that community – a kind of community virtual gathering place and sounding board. For example, at Radio Alba, the focus is on providing education and information to the community and a forum for debate.

Journalism Overall. As to journalists in general, the best indicators are found in the *2006 Media Sustainability Index*. Here, the score for Professional Journalism (Journalism meets professional standards of quality) slightly exceeded the baseline but fell well short of the target (see KMAP Quarterly Report for October-December 2006). The quarterly report also addressed another indicator -- Plurality of News Sources. Here, there was no movement from the 2005 baseline.

KMAP believes that the preoccupation with Status as “the big story” has held journalists back from their potential. There has been an obsession by editors with the government’s daily diary and a consequent predilection for “protocol journalism.” KTV editors confirmed this opinion, saying they had little choice but to focus on “Status” news though they are “sick and tired of it” and are well aware that this leads to more protocol journalism which they “hate.” They said when the status issue is settled, they want to focus 70 – 80 percent on people’s issues, like a war on corruption, private excesses, voter awareness of issues, etc.

Issues

Turnover is an even greater problem among these stations than at the national level and KMAP has had to do much repeat training to bring replacements up to speed. One interviewee said that when KMAP is no longer offering training, there will be deterioration in journalistic skills owing to this turnover issue. People do not leave the stations by and large to go to other broadcasters, but to better paying jobs. At TV Herc, for example, the owner said “employees leave not for other media jobs but to other careers and positions with international agencies with salaries three and four times higher than we can pay.” On the other hand, as he pointed out and we heard elsewhere, there does seem to be a small corps of people who do remain with the stations out of a sense of loyalty, friendship, or family ties.

The Team's conclusion is that KMAP training is well received and immediately applied. There are economic and equipment deficit constraints on the extent to which new skills can be fully applied now. This situation may improve when, in response to regulation, there is a thinning out of the large number of small stations that operate within the relatively small Kosovo market.⁷ This thinning out will also help with the turnover issue as surviving stations become more viable and more capable of paying their journalists and editors a competitive salary.

We picked up other issues at TV Tema (a very impressive radio, TV and print media station) where the fluent English speaking, US educated owner obviously had an agenda for our interview. His basic complaint is that KMAP is focusing most of its resources on the national stations (this is true – 80% of the budget, by design) and he would like to see more attention to local media, as well as continued financial support to AMPEK. Further, he thinks the GIMEK market survey, by focusing on the national stations, is prejudicial to regional stations and should be expanded to include analysis for regional markets such as his. KMAP and USAID are well aware of these complaints from TV Tema. Finally, he is interested in enforcement of copyright and intellectual property laws, and in regulation of the now free wheeling cable industry which competes with licensed stations.

Recommendations

- KMAP and USAID need to give some thought to strategies that will help partner stations maintain skill levels even in the face of serious turnover of personnel. The broadcast skills manual (Reuters manual, in translation) is an important step in this direction and should be presented to partner stations with considerable attention to context and how the manual can be used effectively by these stations as a training tool.
- Some long term support, possibly virtual support, for local stations might be garnered through the Kosovo Institute of Journalism and Communication (KIJAC) (Avni now teaches there) or through OSCE's imminent Kosovo Media Institute, which will provide training for mid-career journalists and media professionals.⁸ KMAP should explore possibilities with both of these institutions.
- Regulation of cable (which local and regional stations see as a serious threat) and enforcement of copyright laws is badly needed and would help stations which choose to operate legitimately. KMAP should continue to work with and pressure IMC to bring about these changes.
- See if larger regional stations such as TV Herc and TV Tema might be persuaded to buy into the GIMEK survey sufficiently to expand it to include analysis of their markets. GIMEK might be able to come up with attractive packages and perhaps other donors can be persuaded to subsidize these efforts for the short term.

⁷ Though we note that particularly in isolated areas even a tiny radio station can provide an important community role, if it is oriented to the community and in touch with its audience.

⁸ OSCE's Kosovo Media Institute project, presently in preparation, will have a budget of €2 million, drawing on EAR (0.5M), Soros (1.0M) and OSCE (0.5M). APJK is a member of the Provisional Board. We were told that Reuters and BBC are bidders on the project.

Evaluation Goal 7: To determine what, if any, media content improvements are needed to enhance the professionalism of media broadcasters. IR2.1 and 2.2

Background.

The appetite of Kosovo journalists has been whetted for more advanced skills. For example, we've heard requests for training in live reporting and investigative journalism. However, the KMAP experts maintain that journalists here first need to become grounded in the basics. These include planning their stories (not being held to the daily protocol diary), better coordination between camera men and journalists, more use of stand-ups and voiceovers, better balance in reporting and news broadcasts, better pacing, use of natural sound, self generated stories and two-way reporting.

Results.

We found no reason to believe that grounding in the basics is not the highest priority, though good progress has been made on many of these basics every where we probed. Moreover, this progress is backed by the indicators. Progress is being made consistently on the basics as shown in the previous two sections. KMAP is commended for its creative cooperation with other USAID implementers to offer journalists training on specialized topics, for instance:

- Role of media and civil society in anti-corruption (with Kosovo Civil Society Program)
- Reporting on the Kosovo Assembly (with National Democratic Institute) and on the Kosovo Consolidated Budget (how it is developed, political aspects) (with Bearing Point).
- Reporting on court proceedings (with National Center for State Courts)
- Trafficking in humans (with Catholic Relief Services)

These training sessions are well attended by invited journalists from within and outside Pristina, including some K/Serb journalists.

In interviewing journalists and editors, the team used as a guide the goals and benchmarks statements generated with each station by KMAP. It is on this basis that we were able to see that the training has penetrated the thinking of journalists and mid-level editors as intended. They were aware of the new concepts and approaches KMAP has introduced and are either using them in their work or would like to. However, again, as discussed earlier, the two key constraints to more significant progress are resistance to change by senior editors and managers as reported by KMAP (the team was unable to meet with Senior Editors as they were attending a conference outside the country during the evaluation week). The second constraint, applying primarily to KTV, is lack of space and equipment. The space and equipment issues appear to be on the way to resolution, as reported elsewhere in this report. Getting the senior editors to move more aggressively to transform the news is unresolved.

Future Training and Associated Equipment Needs.

Whenever we talked with journalists or editors, in addition to discussing prior training, we asked about the priority needs for future training and coaching. The response by interviewee category can be summarized as follows, including IREX reactions:

Two reporters interviewed -- one print, one RTV21 -- after KMAP training:

- More advanced training on work of the prosecution and police.

- In court training -- would like to actually observe a court session and get simultaneous coaching. Would like to have a roundtable discussion during training with both judge and prosecutor.
- Opportunity to work abroad, like in Bosnia and other similar countries.
- On training sessions, get input from journalists on who might be good speakers – a few have been disappointing.
- Case studies and concrete examples are very useful, e.g., participation of a real victim in as was done in the trafficking workshop.

KMAP Response: These are good suggestions that should be consulted in future training, with the caveat that the project does not have the resources for any more training outside of Kosovo. Also, we know that speakers provided by KMAP were very well received. Sometimes the collaborating USAID project had difficulty with speaker substitutions, etc. Taking suggestions from the journalists should help in this regard.

KTV Editors

- Need training and equipment for live coverage. Currently capacity for live coverage is limited.
- Training of journalists on how to do editing on the computer is needed, including how to do composition and editing. This will lead to more quality stories and more time to do them well. Also need more film editors – they have only 3 for everyone. All should have a computer and film editor.
- More training needed on journalists and cameramen working together and need more cameras and cameramen so they can team regularly with journalists.

KMAP response: The project has offered live coverage training but the station has shown very little interest in live coverage to date so a KTV management decision would be needed here. On computer editing, KTV management would have to sign off on this and money found in the KMAP budget to conduct this unanticipated activity. Regarding film editors, they should be included in the KMAP grant equipment lists. More cameras and joint journalist–cameraman team training is highly desirable, though the project only has two more two week cycles of Matt’s training time left in the budget so it would perforce be more limited than what is desired or needed.

RTV 21 Editors

- Need exposure so some of the more experienced media from abroad (CNN, CBS, BBC, etc.) to get closer to EU standards.
- Continue training on journalists working with cameramen but also need more cameras and cameramen so they can team cover, ratio is currently 9 journalists to 5 cameramen.
- Get training on a regular basis – in other words, training is a continuing need, especially given turnover.
- More training for editors.
- Graphics is a weak spot, need more support on graphics.

KMAP Response: There is plenty of advice given but not implemented that would bring stations closer to EU standards. What is needed is innovative leadership, the will to bring about change and supportive management, not more exposure to big name networks. On cameras and cameramen, KMAP grants provided sufficient cameras, the problem is that management has assigned the most skilled cameramen to program and commercial production leaving the less

skilled cameramen for the news. More cameramen with journalist training would be good but editors need to decide to cover stories using this approach. As to more training for editors, this request is strange in view of their resistance to advice and training, unless it is overseas type training. Finally, graphics may not be a weak spot in the future as an excellent graphics person was just recently hired and checks out well with KMAP experts.

Recommendations:

- KMAP should consider some of the requests for training as it maps out its future training agenda.
- The time and resources remaining in the KMAP project are diminishing rapidly but more special topic training through collaboration with other USAID or other donor programs clearly would be beneficial. Some possible topics are local government and decentralization, public health, HIV and AIDs, and business development.
- Is there some kind of training that might get through to the senior editors? The team recommends that IREX ponder this question, but confesses it has no answers.

Specific Evaluation Goals for IR 3: Improved Legal and Regulatory Framework for Media.

Evaluation Goal 8: To assess the legal, regulatory and policy framework for media in Kosovo and make recommendations to improve KMAP's ability to positively impact the legal environment. IR 3.1-3

Progress to date

KMAP has monitored development of media laws, proposed amendments and lobbied for improvements, often in cooperation with AMPEK. Besides broadcast regulation, activities under IR 3 have included working on issues affecting the public broadcaster (RTK) and support for a sound legal and regulatory environment for all media. For example:

- KMAP, with USAID and AMPEK, lobbied the Assembly's Media Committee with a number of proposals for changes to the Law on Radio Television of Kosovo (RTK), which came into force in April 2006.
- The Law on the Independent Media Commission (IMC) came into force in September 2005. KMAP worked with AMPEK towards making the IMC operational.
- As the IMC began producing and publishing draft policies, for instance on concentration of broadcast ownership, licensing criteria and fees, and sanctions, KMAP worked with AMPEK to coordinate responses, suggesting changes and modifications, some of which were accepted.
- Together with AMPEK, KMAP participated in discussions and decision making related to the drafting of the Press Code and the formation of the Press Council of Kosovo. KMAP followed up on that activity by surveying journalists and editors on their satisfaction with the new Press Code and Press Council.
- KMAP also coordinated a test of the Law on Access to Official Documents (LAOD), working with journalists who had developed story ideas that needed documentation and incorporating information from a local NGO that has also done extensive testing. Results showed that government offices are not providing access as required by the LAOD.

Organizational Issue – Relationship Between IR 3 and IR 4

As the KMAP project reaches the midpoint, some reorganization and restructuring of tasks may be warranted, particularly in light of the new USAID objective of increasing work with Serb media outlets. In this context, the Team notes that work under IRs 3 and 4 has always been closely tied, since work with the media associations under IR 4 often involves assistance with lobbying, and that lobbying is often on the same topics that are central to IR 3. The Team believes that wrapping the lobbying activities under IR 4 into IR 3 for the remainder of the project would enhance IR 3 and carry forward the work under IR 4.

Recommendations

- Lobbying activities under IR 4 should be wrapped into IR 3.

Issues – Legal and Regulatory Framework for Broadcast

Effectiveness of IMC. The new IMC has authority regarding licensing, oversight, control and sanctioning of all broadcast media, in line with European practice. A critical issue under this sub-IR is that the IMC has not moved quickly to take charge of this dynamic sector of the economy. Meantime, the office of the chief executive is understaffed and short of budget. In this environment, there is a risk that the IMC cannot, and will not, establish a fair and transparent regulatory regime for the broadcast media within a reasonable time frame.

New Media. A new factor in the broadcast market in Kosovo is the presence of satellite and cable television service providers. These services are unregulated, so no-one knows exactly how many companies are providing service, what facilities they are installing, how many subscribers they have, what kind of programming they are providing and whether they have retransmission rights. What is certain is that they are a new and destabilizing factor in the market for media services that can have a negative impact on existing broadcasters. See Attachment 3, Notes on the Pressing Need for Cable Television Regulation in Kosovo. A fair regulatory regime for broadcast requires attention to regulation of new media, especially cable television.

Recommendations – Legal and Regulatory Framework for Broadcast

- The IMC's Chief Executive has requested assistance of the KMAP legal adviser on regulatory matters, and has also requested KMAP assistance and advice on the regulation of cable television. We recommend that these items should be added to activities (or as a new activity?) under IR 3.

Issues – Legal and Regulatory Framework for Independent and Sustainable Public Broadcaster

Status of the RTK Board. The regulatory framework for RTK is still in transition. The IMC is formally in control, and has initiated procedures to create a new RTK board, but no nominations to the board have been made.

Minority Media Fund. A provision in the RTK law requires that 5% of RTK fees (which are charged as part of the electric utility bill) must be set aside for a Minority Media Fund to support “minority, multi-ethnic and disadvantaged media” (though RTK has challenged this set-aside provision). This fund, which is managed in the Office of the Prime Minister, is a large and important resource for minority media. Procedures for handling it should be transparent and criteria for making awards should be objective and open to review.

Recommendations – Legal and Regulatory Framework for Independent and Sustainable Public Broadcaster.

➤ KMAP should continue to monitor progress on establishing the RTK board, and if possible should play a part (perhaps through AMPEK) in public oversight of the minority media fund.

Issues – Legal and Regulatory Framework Supports and Protects Free Speech

Press Council, Code of Ethics, Self regulation.

The Press Council is a self-regulatory body for the print media, implementing the journalists' Code of Ethics. The Press Council has authority to impose sanctions, order publication of retractions, and other remedial action when it finds the Code has been violated. It has been successful in mediating some disputes and has imposed some fines. The Y2 Workplan shows continuing activities to promote the Code of Ethics, including a survey of journalists and media owners to obtain opinions and assessments of the Council's activities.

Law on Access to Official Documents (LAOD).

Under the Y2 Workplan, KMAP will conduct another test of the effectiveness of the LAOD (by coordinating submission of requests to various government entities and compiling the results) and will train media professionals on using the law effectively.

The Team notes, and agrees with, the comment in the Workplan that the Administrative Instruction (AI) implementing the LAOD is inadequate. This is confirmed by KMAP's first test of LAOD implementation, which showed that government institutions were granting access requests only about 1% of the time. In this context, KMAP's survey has confirmed that the LAOD is not working as intended, to provide a public right of access and to improve transparency. See Attachment 4, Notes on LAOD. We believe there are better ways to address the transparency issue.

The LAOD is not a major focus of KMAP. Nonetheless, the Team suggests that there are ways to raise the issue of faulty LAOD implementation (at relatively low cost) that will address the problems illuminated by the survey. The APJK board has expressed a strong interest in addressing problems under the LAOD, and the APJK Executive Director concurs in this. KMAP might advise and assist APJK on this matter. The following suggestions are offered to "jump start" thinking on this issue, should KMAP and USAID agree to modify the proposed activities as set out in the Workplan:

- The Administrative Instruction sets up an LAOD implementation commission, the Institutional Commission for Assessment of Administrative Practices in the Field of Official Documents. APJK might be able to lobby the Commission for a more enlightened approach to transparency. KMAP might assist this lobbying activity by preparing a position paper for APJK that discussed international norms on access to official documents (e.g. European Union, US and Canada, and possibly some Balkan

- examples)⁹ and ways in which the LAOD falls short of these norms. An estimate of the enormous cost of complying with the law, as presently set out in the AI, might provide a powerful argument for reform.
- KMAP could explore whether other NGOs with an interest in transparency – such as the Youth Initiative for Human Rights, Rule of Law programs, Transparency International – would support APJK lobbying efforts, or whether a coalition could be formed to support measures to restore the commitment to transparency that is expressed in the LAOD.
 - The Administrative Instruction sets out a list of documents that can be made available routinely. It is limited to “statements for media, contact information for the citizens, or institutions forms and or brochures.”¹⁰ KMAP could support APJK in lobbying for a modest expansion of this list – e.g., to include organizational charts, addresses of government offices, functions performed by different offices, laws and administrative instructions that affect the public, notices of public hearings and (at a slightly more controversial level) procurement information and budget information.
 - An alternative approach to testing the law might be to look at areas where there are commitments to transparency that don’t depend on the LAOD. Several Kosovo municipalities have adopted a transparency plan that includes budget information. Another area where there are transparency requirements is in government procurement.

Recommendations - Legal and Regulatory Framework Supports and Protects Free Speech

➤ **Press Council.** The team did not gather extensive information on Press Council and Code of Ethics activities and consequently hesitates to make a definite recommendation regarding activities to monitor the Press Code. However, we believe that the Press Council has been well launched, and that it is carrying out its self regulatory role. At this point in the program, as the project readies some rebalancing of activities and reallocation of resources, we suggest that effort and resources allocated to the Press Council activities might be reallocated, should there be a need to shift these to activities with a higher policy priority.

➤ **LAOD.** In cooperation with APJK, look for ways to publicize the shortcomings in the Administrative Instruction on the LAOD, and ways to revitalize the principles of transparency and public access set out in the LAOD.

⁹ Similar laws in Bulgaria (we know) and Serbia (we have been told) have been more successfully implemented.

¹⁰ Admin. Instr. Art. 3.2(vi).

Specific Evaluation Goals for IR 4: Professional Associations Represent Media and Journalists Interests Effectively.

Evaluation Goal 9: To assess the organizational capacity and development needs, if any, of the media associations and make recommendations as to any possible future role for KMAP in their development. IR 4.1-2

Background

KMAP has supported through both KIMP and KMAP the development of the Kosovo Association of Independent Media Owners (AMPEK) and the Kosovo Association of Journalists (APJK). Both organizations have been given training, operational grants and technical assistance. The KMAP contract called for funding these organizations during the first year of the contract only, so KMAP funding is over for both organizations. However, the Workplan calls for continued TA to AMPEK and APJK, even though direct funding has terminated. We interviewed the executive directors and some board members of each of these organizations and tested organizational relevance and competence in other interviews of editors, journalists and station owners.

Results

Both organizations are well established with membership rolls, rotating boards and competent executive directors. The 2006 MSI score exceeded the target, indicating in large part the panel's appreciation of the work of these two associations, and particularly AMPEK. This index has shown a steady upward trend since the baseline was established in 2003 (see latest KMAP quarterly report). Both AMPEK and APJK have found new sources of external funding for operational and perhaps other costs. In the case of AMPEK, the support is coming from the National Endowment for Democracy in Washington, DC while APJK is being funded by the Balkan Trust for Democracy, of which USAID is a member and which gets its main support from the German Marshall Fund. Both associations operate solely through their executive directors and volunteer boards.

Issues

Neither organization has worked out a clear path to self sufficiency – a target on which their new benefactors should now be focusing. AMPEK still does not charge fees for its members, though this has been “under review” at least since 2004.¹¹ Board members said they are making membership fees a matter of priority.

Both organizations are interested in continuing to work with KMAP, especially in the legal arena. Our sense is that APJK will be more pro-active in seeking KMAP assistance but the door is open in both – see below separate discussions of each organization.

¹¹ ARD, Inc., *Kosovo Media Assessment: Final Report: Final Report* (March 2004) (USAID/Kosovo) at page 6.

Recommendations

- The associations need KMAP support on legal issues of the type that fall under IR 3.0. Therefore, the team is recommending that IR 4.0 be dropped from the PMP and that the residual work on legal issues be incorporated under IR 3.0. Suggestions on indicators for this work will be addressed under E-Goal 11.
- To the extent that there is continued collaboration with APJK on training activities as discussed above, the team recommends that this be included under IR 2.0. Indicators that would cover this work are already in place under that IR.

AMPEK - Observations and Issues.

Members contacted seemed to think AMPEK is doing a good job representing them. The owner of TV Tema, an AMPEK Board Vice President, said that AMPEK does a “great job,” including legal support, the cinematography law, and dealing with procedures inside the IMC. He said the international presence (KMAP) helped get the law through in Kosovo. As noted, he would like to see KMAP continue its support, which can be done in the area in which he is most interested – laws and procedures – though he would like to see training as well. He commends AMPEK for its regional and local interest and support. AMPEK has a good working relationship with The Association of Commercial Television in Brussels from which they receive some pro-bono consulting on, for example, comments on draft laws and amendments.

The Executive Director of AMPEK was complimentary about the support that had been provided through KMAP and said they are especially helpful providing lobbying support. She has always felt and still feels that she has complete and easy access to KMAP staff and would like to continue to work with KMAP in the legal area (see E-goal 8 above). KMAP lawyer Driton Qeriqi has her complete confidence and she looks forward to working with him on IMC and other issues.

Her only complaint was a deeply felt one and one that really is past history. That issue is the exceedingly slow grant delivery process which caused her to wait sometimes as long as 5 months for operating funds. There seemed no way for her to speed the process and she asserts that there were even delays in paying vouchers once the grant was in place. Were it not for this frustration, AMPEK would have nothing but praise for KMAP, but this issue has taken its toll. See discussion under E-goal 12 below.

Recommendations

- AMPEK will no longer be reporting to KMAP so Driton and Andrew probably should be pro-active in their support to and collaboration with AMPEK in the legal area. Perhaps periodic lunches or informal coffee chats with the Executive Director would work well in helping her define issues on which KMAP can be helpful, such as IMC rate structures and regulation of the cable industry which is a high priority for AMPEK.
- Reporting will be a sensitive issue, as AMPEK will want to give major credit for its achievements to NED from here on. In other words, KMAP should contain its reporting on AMPEK to the nature of its support, rather than, for example, milestones or targets achieved by AMPEK.

APJK – Observations and Issues

APJK has an e-mail list of its members, makes press releases for its members when needed on specific issues and is an associated member of the International Association of Journalists. The idea of adding a newsletter was discussed in a meeting with board members and reportedly APJK has promised the Balkan Trust for Democracy that they will start charging members a fee. Journalists with whom the team met and questioned on this issue indicated their willingness to pay a fee, though they would like to see the Association become more proactive and aggressive on issues effecting journalists, for example defending journalists who are attacked (physically or legally) because of news-gathering activities. Another well known journalist, however, praised APJK for its good job in reacting to infractions against journalists.

The relationship between APJK and KMAP is obviously a good one and the Executive Director says its association with KMAP gives it much added credibility. The board members with whom the team met also wish to continue the association with KMAP, especially in the legal area, for example in making the LAOD more effective, as discussed more fully in E-goal 8 above. Board members were also interested in training for journalists through KMAP and would like to be kept in the loop for planned KMAP training opportunities, such as training sessions with other USAID implementers. Interest was expressed in training on special topics like justice, the legal system and the economy health care, public finance and status negotiations and agreement. Finally, KMAP has been providing some TA to maintain the Association’s website and they would like that support to continue as well.

Recommendations

- APJK is ready to sit down with KMAP to map out a strategy and program of assistance for the balance of the KMAP project, along lines summarized above and discussed in more detail in E-goal 8.
- Bringing APJK in as a partner on group training as was done in the case of the recent “Trafficking” workshop with CRS is an excellent way to help strengthen the association. The team encourages KMAP to continue and expand this practice with APJK. This type of training has been popular with the USAID partners and with the journalists and KMAP has been credited by those interviewed with doing an excellent job.

Cross-Cutting Themes

Evaluation Goal 10: To assess proposals for extending KMAP to provide additional support for Serbian language media in Kosovo and recommend evaluation methods to measure their success. All IRs plus PMP

KMAP's present support for Serbian language media.

Minority issues are a cross cutting theme in the KMAP Results Framework.¹² KMAP is asked to address this theme by working to improve media reporting on minority issues, to increase interaction between media and representatives of minority groups, to increase interaction among journalists in different ethnic groups and to enhance professional opportunities for minorities in media. In response, KMAP has had at least four activities that draw K/Serb media representatives into the KMAP program:

- KMAP's Local Media Partner program includes three K/Serb stations (see Attachment 2), and KMAP has worked quite intensively with those stations, especially TV Herc, to improve business management, promote viability and increase professionalism.
- KMAP commissioned a study of women and minorities in the media. The survey of Kosovar media outlets included 28 Albanian and 10 K/Serb outlets. The study generated some baseline information about attitudes, particularly attitudes to hiring across ethnic lines and observations about objectivity in reporting on ethnic issues.
- KMAP's competitive Media Incentive Grants have enabled grantees to produce programs dealing directly with K/Serb issues and ethnic relations. For instance, a KMAP grant enabled the Balkan Investigative Reporting Network (BIRN) to produce a series of debates that dealt with such controversial subjects as mythologizing historic events, specifically the Battle of Kosovo, and ethnic relations in Mitrovica. These programs had wide exposure in Kosovo, and were also broadcast on B92, reaching a substantial audience within Serbia.
- In cooperation with other USAID implementers, KMAP has run a series of training programs for journalists on specialized topics. Some K/Serb journalists have attended these training sessions.

Through these projects, KMAP has accumulated significant experience working with K/Serb media in Kosovo. COP Andrew Clayton has reviewed the status of Serb language media in Kosovo and has suggested some options for increased engagement. These options are taken into account in the discussion below.

Issues

Demographics. Besides the areas of K/Serb concentration in the north, there are small K/Serb communities scattered throughout Kosovo. In total, K/Serbs represent an estimated 5% of the Kosovar population, or about 120,000.¹³ K/Serb broadcast stations mostly have quite limited coverage and little or no local programming. National audience research suggests that the

¹² Minority issues, in the Kosovo context, refers to all ethnic minorities, including Turks, Roma, Bosnians and Croats as well as Serbs. This Evaluation Goal deals with the Serb minority. We will use the abbreviation K/Serbs to refer to Kosovar Serbs.

¹³ All population figures are estimates, since reliable census figures do not exist.

audience is small. Audience research focused specifically on the K/Serb communities would provide more information, including data on viewing of RTS and other Serbian programming. It would also provide a basis for estimating potential advertising revenues, should a network come into existence that could sell local and regional advertising to businesses that need to reach the K/Serb community.

Links to Serbia. Some K/Serb media outlets, particularly TV Most in Mitrovica and Zvecan, are said to receive substantial support from Serbia and maintain close ties with Belgrade. Serb language programming from RTS and B92 is carried on many K/Serb stations.

Networking. We are told that the US Office has raised the question of whether it is possible to have a media link among these communities which would enable video programming with a Kosovo orientation to reach all or most of the K/Serb community.

There is no spectrum available at present for a license that would enable a national independent K/Serb television station.¹⁴ A video network, therefore, would presumably combine broadcasting where broadcast is available with cable distribution where it is not. The problem is moving the programming from the point of origin to the distant broadcast transmitter or cable head-end. The cost of a microwave video link may be prohibitive; the cost of a private video network might be more manageable, if the technology is available. TV Herc claims to have partially solved this problem, maintaining that its programming is presently able to reach about 60% of the K/Serb population, with some programming moving over a microwave link for rebroadcast or cable carriage. TV Herc also claims to have expansion plans that would enable Herc programming to reach 80% of K/Serbs.

Relevant to networking is the question of whether all K/Serb media would want to take part in such a network. TV Herc, TV Mir and TV Puls are interested in using a network to exchange programming. Those with allegedly close ties to Belgrade – such as TV Most – presumably will prefer to retain those ties, and, having financial support from Serbia, are not dependent on improved revenue flows from advertising. If their viewers remain loyal to their programming, this would further reduce the potential viewership for an all-Kosovo K/Serb network.

Such a network would have some appeal to advertisers, both local and regional. But even with increased advertising revenues, it is doubtful whether such a network would be commercially viable, based on only 5% of the population (or less, since some K/Serbs will continue to watch Serbian stations).

A network of K/Serb radio stations has been tried. The 2004 Media Assessment notes that the OSCE attempted to facilitate formation of a K/Serb network by electronically linking 27 Serbian language radio stations so they could exchange news and information. “However, the project has been delayed for more than a year by technical difficulties and disagreements between the

¹⁴ We asked whether the K/Alb national stations could carry K/Serb programming, and are informed that this is not a practical solution. Audience research shows that Serbs are unlikely to “dip in” to an Albanian broadcast service to find Serb language programming, while Albanian viewers are likely to react negatively to the perceived “interruption” of Albanian language programming.

stations.”¹⁵ The end product of this project, we believe, is the KOSMA network which links five or six K/Serb radio stations.¹⁶

With these issues in mind, we have the following recommendations for ways in which KMAP can extend additional support for K/Serb media in Kosovo. Evaluation of activities that are a continuation of existing activities need not be changed. As to new activities, we believe evaluation decisions are best made after the contours of the activity are better defined.

Recommendations:

- Explore the possibility of finding grant funds (from within or outside KMAP) to pay for audience research (through GIMEK) specifically focused on K/Serb areas, with questions about viewing and listening habits.
- Continue to explore whether there is a practical and commercially viable way to link K/Serb media outlets to provide a common voice for the K/Serb community. If there is no commercially viable option, lay out the issues so as to provide a sound basis for a government policy decision on whether such a voice should be provided on a subsidized basis.
- Continue and intensify the KMAP activities that have been successful in reaching the K/Serb media community, i.e.:
 - Continue to invite and facilitate attendance for K/Serb journalists to participate in KMAP training programs.
 - Use incentive grant funds to encourage the development of local programming by and for K/Serb stations.
- Develop a new KMAP activity to support the OPM in making decisions on the Minority Media Fund and to support the IMC in developing a coherent policy on broadcast regulation, including careful consideration of the effect of licensing policy on minority media outlets. This activity could be supported by the COP and the KMAP legal adviser.
- Provide TA directly to K/Serb stations. This would fall under existing IR 1.3 (selected media outlets improve business performance) and IR 2.2 (increased professionalism of journalists). Various possibilities have been suggested:
 - Engage a Media Adviser (who would have to be Serbian or K/Serb or international), to work with K/Serb stations to improve performance on the business management side. The experience already gathered under IR1.3 (and, if this recommendation is accepted, captured in a practical manual) will provide a platform for this.
 - Provide training and mentoring to improve professional reporting and production skills and enhance local news coverage, building on experience gained working with TV Puls and TV Herc.¹⁷

¹⁵ ARD *Media Assessment* at page 6.

¹⁶ Willem Houwen, the director of KIJAK, told us that he has worked quite extensively with K/Serb media and helped to set up the KOSMA network.

- Explore the possibility of helping to finance a sales manager who could work with K/Serb stations and advertisers, throughout Kosovo and the region, who wish to reach the K/Serb market.

Evaluation Goal 11: Review the indicators that KMAP is using and ensure that they are adequately linked with what USAID has to report on (i.e., that the KMAP program supports USAID’s reporting requirements) PMP.

Background

The current performance monitoring plan was designed such that USAID would be able to pick up on indicators as needed for its annual reporting. Now that USAID is adopting standardized indicators worldwide, IREX wanted to be sure that the current set of KMAP indicators meets USAID’s needs.

Issues

The team reviewed with KMAP staff all of the indicators in the PMP and as reported on in the annual and quarterly reports. All of the indicators and the methodology used to develop the numbers checked out. We had no reason to question the validity of any of the indicators and KMAP did not feel that any of them were too time consuming to be worth the effort. However, the team is recommending several changes in approach that would call for some modifications in the PMP as set out in recommendations below and addressed also in Evaluation Goals 8 and 9.

The team discussed the possibility of spinning off the weekly content analysis to another organization. However, in discussions with KMAP it was decided that because of the continuity and confidentiality important to this indicator and possible budget implications of having it done elsewhere, it would be better if it were kept in-house.

The team discussed the PMP in a meeting with USAID. USAID agreed that the system is an excellent one and indicated that they share the KMAP PMP with other USAID partners as a kind of model. At this meeting, the team learned that the new USAID monitoring system is not being implemented yet on current projects as not all of the indicators have been developed. When it is applied, the new system will use output indicators rather than the traditional results oriented indicators required by USAID in recent years. Fortunately, there are sufficient output indicators (e.g., number of journalists trained) in the KMAP PMP that USAID will be able to use these in the current reporting system. The team was advised later by Social Impact that USAID in Washington has decided to use current PMPs and their indicators for existing projects and build the new system into the new projects.

¹⁷ A possible supplement to KMAP TA in this area, especially as KMAP moves towards close-out, might be through KIJAK or other local universities/technical programs. KIJAK has a number of Serb students and at least one Serb instructor. We spoke with Director Willem Houwen about the possibility of initiating a clinical or “praktikant” program where students might provide coaching and mentoring to local reporters. He was open to exploring this possibility. Such a program (which would not need to be limited to K/Serb reporters and media) would have the additional advantage of possible continuation after the KMAP program is concluded.

Recommendations.

We conclude that the current PMP should stand with the following exceptions which are based on recommended changes in approach under IRs 3.0 and 4.0.

- As noted in Evaluation Goals 8 and 9, the team recommends that IR 4.0 be dropped from the plan and future reporting and that the remaining unfunded work with AMPEK and APJK on legal issues be included under IR 3.0 (see discussion of indicator below). To the extent that KMAP engages APJK in its training program, this can be picked up under IR 2.0 using the existing indicator *# of journalists trained*.
- Within IR 3.0 the team recommends dropping the IR 3.3 indicator: *Increase # on scorecard for Access to Information Law test cases* (collected annually), as discussed in Evaluation Goal 8. The team recommends that KMAP modify its approach to LAOD activities, focusing on making the law more effective, rather than testing its operation.
- When the series of actions is worked out in full between KMAP and APJK, the team is recommending that a process indicator be devised to track progress. It is unlikely that real change in LAOD implementing regulations will occur within the timeframe of the KMAP project so the focus should be on the lobbying process and its buildup.

Evaluation Goal 12: Investigate incentive grants and the grant-giving process overall to see how it can be improved.

Achievements to date

The KMAP grant program totals just under \$1.8 million. It consists of three types of grants: Directed Grants to Key Media Organizations (totaling \$1.4 million), Directed Grants to Media Associations (totaling \$50 thousand) and Competitively Awarded Incentive Grants (totaling \$150 thousand).¹⁸ All grants are processed by KMAP in accordance with the KMAP grants manual, which sets out a detailed and highly professional procedure for managing the entire grant process.

Issues

We have heard from KMAP, from grant recipients and from USAID that there have been long delays in processing grants, and that these delays have sometimes created acute difficulties for the recipients, especially in the case of Directed Grants that were intended to meet operating costs.

There appear to be a number of impediments in the grant process.

Equipment Grants. Informants agreed that with regard to equipment purchases for RTV 21 and KTV, delays are caused by the need to get a Source, Origin and Nationality (SON) waiver each time equipment is to be purchased (because virtually all of the needed equipment is of non-US origin). Attempts to address this by getting a blanket waiver have bogged down, and the process for getting the waiver on a case-by-case basis is unlikely to change. We were unable to determine whether there are other causes for delay in the equipment grant process.

¹⁸ IREX, *KMAP Grants Manual* (August 2, 2005) (prepared for USAID/Pristina, Kosovo) at page 6.

Operating grants. Delays in operating grants are the delays that are most apt to cause hardship. We were unable to locate the cause of the delays that have occurred in processing these grant applications; however, without a doubt, they have occurred and have been brought to USAID's attention. Operating fund grants are almost exhausted, however, so the major issues regarding these grants are in the past.

Incentive grants. We heard less about delays in incentive grants, but apparently they do occur. Since these are small grants, the process should be more expeditious. USAID informants raised this issue, and stated that there has been some question about whether KMAP has sought clearance through Budapest when such clearance was not really required. We do not have enough information to determine whether this is a problem, or whether there may be other issues. Since round 2 of the incentive grants is in process and round 3 lies ahead, this is worth some immediate attention.

Recommendation

While we cannot be precise about where and why delays have occurred, we recommend that KMAP and IREX carefully review the chain of approvals needed in the grant process, find what circumstance or combination of circumstances has caused unreasonable delay, and, if the cause or causes are within KMAP control, seek resolution for the future. If the cause is not within KMAP control (as seems to be the case, for instance, with the SON waivers), we recommend that KMAP lay out the issue for USAID.

Success Stories

The TOR asks the team to identify success stories from the KMAP project. Indeed, USAID expressed a lively interest in having KMAP success stories periodically for their weekly report to Washington. The team has set out here some of the major successes produced by KMAP so far:

1. KMAP has achieved excellent collaboration with other USAID implementers in training journalists to provide more informed coverage of specialized topics. KMAP has facilitated training sessions where other USAID implementers have provided journalists with the kind of specialized knowledge that will enable well-informed reporting on a variety of important issues, including public health issues (bird flu), anti-corruption, how the Kosovo Assembly works (3 one-day seminars), how the Consolidated Budget is developed, how to report on court proceedings (six seminars) and other topics. After the seminars on court reporting, content analysis showed the quantity and quality of reporting on court proceedings improved measurably.
2. K/Serb journalists are well represented in these KMAP training sessions. At the most recent such session, on human trafficking, four K/Serb journalists attended out of a total of about 15 attendees. These sessions have regularly drawn in K/Serb attendees.
3. KMAP's incentive grant program has been outstandingly successful in drawing in a broad and diverse group of applicants for these grants, which support the production of innovative video and audio programs. The first round of grants has been completed and the second is now underway. In response to the first RFP, KMAP received 43 proposals with ideas for projects on youth, gender and minority issues. Seven grants were awarded.
 - One grantee, Balkan Investigative Reporting Network, produced a series of three debates dealing with extremely sensitive inter-ethnic issues. In one debate, women politicians discussed mythology of historic events, specifically the Battle of Kosovo. A second

brought Albanians and Serbs together in Mitrovica to discuss issues in that divided community. One attendee, an Albanian from the southern part of Mitrovica, said “This is the first time members of the Serbian National Council and an Albanian politician have sat down together, and this gives me hope of a solution for this town.”

- A second grantee, Link Productions, produced six documentary films dealing with political and economic integration of minority communities in Kosovo. One of these films dealing with the Roma community in Gracanica, won the first prize in a United Nations Kosovo Team contest, and also won a special diploma at the Local Television Festival in Slovakia.

4. KMAP helped to revitalize the Joint Industry Committee and facilitated successful launch of the organization as an NGO, now known as GIMEK, for the purpose of conducting audience research to support advertising sales and marketing. (Potential advertisers will accept such surveys as authentic only if they are industry-sponsored, rather than being sponsored by an individual media operator). Conflicts among board members were set aside, and all parties have accepted the value of the new and sophisticated audience surveys that are now managed by GIMEK. The second diary-based audience survey will take place around the end of February, with some grant assistance from KMAP, but thereafter GIMEK will take financial responsibility.

5. There has been a steady rise in news programming quality through use of KMAP training in producing news stories. When this happens it is not just the news stations that benefit. People are better informed, democracy is better served.

6. KMAP has coached KTTN and its board through the process of transformation from an NGO to an LLC, a lengthy and complicated process that is now almost complete. When the transformation is finalized, the board of directors will take over control of this valuable asset (which includes leases for 11 tower sites, most of them 99 year leases) and will manage it as an independent business.

7. In the first year of KMAP, COP Andrew Clayton worked with RTV 21 management in the preparation of a business plan and loan application for a substantial loan (€3 million) from the Media Development Loan Fund to fund the purchase of the Media House Annex. RTV 21 survived the due diligence and was approved for the loan – indicating that MDLF had confidence in the long-term viability of RTV 21’s business.

8. Local radio station Radio Alba worked with KMAP’s Business Adviser to improve the station’s business management. The station took on two new commission only sales people and developed new contacts with advertisers. They created new cost control systems and again ensured the station complied with government regulations. Revenues increased by about 15%, and the station was profitable in 2006. At the same time, the son of the owner, Ilir Mucolli, was a successful bidder for one of the KMAP incentive grants. The proposal was well structured and imaginative, offering a series of six programs on the life of women in rural areas. Ilir has transformed Radio Alba from the rather stuffy old fashioned radio station run by his father to a much more energetic organization, in touch with its audience and its advertisers.

Recommendation

➤ KMAP should work with USAID to see which of these stories should be fleshed out for USAID reporting purposes. In addition, KMAP should keep alert to other successes that will emerge from the project, especially those of a human interest nature. The team has highlighted here the main successes, but along the way there have been individual and station

triumphs that “make good copy.” USAID has indicated it will be receptive to an interested in this type of story for its own reporting on programs, and this kind of publicity should be advantageous, also, for IREX.