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MONITORING AND EVALUATION SUPPORT ACTIVITY (MEASURE II)

BRIEF MEDIA ASSESSMENT UPDATE

November 2020

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INTRODUCTION

The United States Agency for International Development Mission in Bosnia and Herzegovina (USAID/BiH) has requested its Monitoring and Evaluation Support Activity (MEASURE II) to conduct a brief assessment of the media landscape for Bosnia and Herzegovina. This assessment explores developments and challenges in the media sector from 2016 to date, with a focus on digital media. To answer the assessment questions (stated in the analysis below), we reviewed secondary documentation and consulted with 12 stakeholders, including journalists; media experts; and individuals representing independent media outlets, media non-governmental organizations (NGOs), journalist associations, and academia. The consultations occurred from October 30 to November 4, 2020. The initial list of stakeholders and key informants (KIs) to be consulted was developed by USAID and expanded upon by a media expert contracted for this assessment (see the Annex for the full list of key informants).

FINDINGS AND CONCLUSIONS

CONTEXT OF THE COVID-19 PANDEMIC

Q1: What are the most pressing effects of the pandemic on media outlets?

The COVID-19 pandemic has exacerbated many structural weaknesses in BiH's media sector. More than 10 percent of BiH journalists lost their jobs, while 77 percent noted mental health challenges.¹ According to an internal survey of media professionals conducted by the Balkan Investigative Reporting Network Hub in April and May 2020, financial support (58 percent), editorial support (14 percent), and fact checking (12 percent) are their top priorities during the pandemic.

The KIs noted that the pandemic worsened existing problems faced by the media in BiH. In addition to intensifying political and institutional pressures on professional media and financial difficulties, KIs noted increasing restrictions on access to information of public importance, and increasingly difficult communication within newsrooms, with audiences, and with sources reluctant to share information online. Other existing internal problems in the sector, such as reporting without verification, use of non-expert sources, rampant propagation of misinformation, and reproducing rather than generating original media content, were also exacerbated during the pandemic.

Our desk review and key informant interviews (KIIs) have also revealed some unexpected positive effects of the pandemic on the media, including improved basic digital literacy of editors and journalists; increased reach of digital media and active interactions with citizens; increased demand for reliable, professional and local reporting on the pandemic; and increased solidarity and cooperation among journalists.

MEDIA OPERATIONS AND BUSINESS

Q2: Is the existence of the media outlets under the question now and if so what kind of help should be given to independent media outlets to help them secure stable resources to operate as viable enterprises?

¹ 'BH Novinari' Association's survey, <https://bhnovinari.ba/bs/2020/06/22/anketa-o-utjecaju-covid-19-vise-od-10-posto-novinarki-u-bih-ostalo-bez-prihoda-preko-77-navode-da-im-je-narusena-psihicka-stabilnost/>

The already precarious existence of professional and independent media in BiH has been further jeopardized by the COVID-19 pandemic.² Recent estimates indicate that the media in BiH generate most of their revenue from commercial activities³ (35-40 percent), advertising (around 25 percent), and public funds (20-25 percent).⁴ In addition to declining revenue from traditional advertising, revenue from sponsored content, memberships and subscriptions plummeted as the pandemic set in.⁵ For some media outlets, financial burdens resulted in layoffs (e.g., Oslobođenje, FENA). For digital media, many of which operate with minimal staff, the financial pressures meant putting on hold plans for much needed hiring and professional development. Foreign grants remain a crucial source of revenue for most professional and independent media⁶ and our KIs view support in some form of institutional, core funding, as essential.

Overall, few media organizations view themselves as businesses or project implementers; most of them exclusively emphasize their public role and mission as watchdogs. The conceptual shift to an entrepreneurial mindset is further complicated by the lack of knowledge, skills and resources necessary to diversify their revenue and introduce new (digital) models of monetization.

POTENTIAL FOR PARTNERSHIPS/COLLABORATION

Q3: Are there enough partnerships/cooperation among media and focus on issues of common interest? Should this be strengthened and how?

Most partnerships and collaborations in which BiH media outlets engage are informal and organized around content exchange. There is little cooperation with other sectors, though the most common collaborations are with CSOs. Partnerships with the business sector are rare.

One example of partnerships among media outlets is the content sharing arrangement between 'Oslobođenje' and various regional and local platforms (e.g., BBC, Radio Free Europe, 'Nezavisne novine' of Banja Luka), where organizations are publishing each other's stories/products. Such partnerships, even between individual journalists, allow partners to enhance the variety of content, reach wider audiences and strengthen their respective reputations. In another example of cooperation, the Center for Media Development and Analyses brings together about 12 to 15 small independent outlets to jointly investigate stories and pool their knowledge and skills. Partnerships and collaboration around issues of common interest are even more crucial in smaller communities, where local media struggle when working on investigative stories, as everyone knows each other. Overall, KIs felt that strong partnerships contribute to quality of media products and increased reach.

CONTENT PRODUCTION AND AUDIENCE ENGAGEMENT

Q4: What should be done in order to strengthen the ability of content producers to engage wider audiences and expand reach, particularly in digital space?

In BiH there are no demand-side studies or reliable and verified information on audience needs, habits and expectations from the media. Although 43 percent of citizens mainly trust the media, only

² The Western Balkans in Times of the Global Pandemic, BiEPAG, April 2020: <https://biepag.eu/wp-content/uploads/2020/04/BiEPAG-Policy-Brief-The-Western-Balkans-in-Times-of-the-Global-Pandemic.pdf>

³ 'Commercial revenues' here means income from a mix of commercial activities, advertising, and sponsorships, with outlets citing small retail business, PR services, and pharmacies as complementary revenue-generation activities.

⁴ BiH media landscape analysis conducted by Thomson Foundation during December 2019 and January 2020

⁵ The Splice Media global survey, available at: <https://www.splicemedia.com>

⁶ Thomson Foundation media landscape assessment, January 2020

two percent trust them completely, and 12 percent have no trust at all. People aged 18-30, as well as those with better education and higher incomes, place greater trust in digital media than other age and income groups.⁷

According to the KIs, audiences favor short and visually appealing media products over the current staple products of investigative journalism (e.g., sole texts, long articles and videos). Improvements in this regard require new knowledge, tools, and technologies, for which the existing media lack resources. BiH media also lack knowledge in digital marketing and outreach strategies, and domestic expertise in these domains is limited. To improve their outreach strategies, media organizations need to collect and use information on audience needs and preferred formats and improve their knowledge and skills in digital marketing. However, though aware of the importance of expanding media reach, the KIs' responses suggest that few initiatives have been taken so far in this direction.

SECURITY OF JOURNALISTS

Q5: How often are the threats against journalist used as way of pressure to independent media? What can be done to prevent those threats? Is legal representation to media outlets that are subject to politically motivated lawsuits sufficient or help is needed there as well?

Both the available reports and our KIs indicate that the safeguards of freedom of expression and of the media are crumbling. In addition to verbal assaults and threats, there is a worrisome rise in physical violence against journalists, even instances of gender-based attacks, and direct and indirect political pressures. There have been 51 cases of violence against journalists in 2020 to date (October 2020) compared to 56 cases in 2019.⁸

Politically motivated lawsuits continue to represent an additional burden on professional and independent media outlets and journalists already struggling to survive. Inadequacy of institutional and legal protection of journalists continues to be a major issue, particularly in the pre-trial phase. Police and judicial investigations are protracted and inefficient. Only 27-30 percent of reported crimes are resolved, and courts tend to interpret the legislation intended to protect journalists and their work quite narrowly.⁹

Reducing political pressure on journalists is an ambitious task requiring engagement of multiple stakeholder groups. Capacity should be built among media stakeholders to be more vocal and persistent, with articulated messaging to solicit stronger reactions from CSOs and the public. In addition to a continued need for legal representation of media/journalists in politically motivated lawsuits, improved capacity of police and judicial actors to process such cases could be a step toward improving media security. International actors should be united in conveying clear and consistent messages of intolerance to threats and violence against journalists.

CYBERSECURITY

Q6: How prevalent are cyber-attacks in BiH and how to improve protection of media outlets in this domain?

⁷ Western Balkans Target Audience Analysis, Final Report, Jan 2019

⁸ Association BH 'Novinari', <https://bhnovinari.ba/bs/2020/11/01/velika-analiza-bh-novinara-istrage-i-procesuiranje-napada-na-novinare-i-medijske-radnike-u-bosni-i-hercegovini/> combined with oral updates provided by Borka Rudić during research

⁹ Ibid.

Digital security readiness of online media in the Western Balkans (WB) is low, even though they are aware of technical risks in the digital environment, particularly in media organizations covering issues of corruption or human rights. Although online media mostly embrace digital tools in their work (social media, online advertising, etc.), this is usually not the case with digital security tools and practices. A number of donor projects to date provided technical assistance to media organizations to improve their digital security, but they were mostly short-term. There is only one regional actor (Share Foundation based in Belgrade, Serbia) that can provide capacity building on the organizational or sector level.

According to the KIs, cybersecurity is not considered a priority issue for local digital media, due to the preponderance of other kinds of pressures (verbal and physical threats, financial/economic pressure). The KIs mentioned two instances of cyber-attacks (by hackers from Russia and China), but neither was adequately investigated by the authorities. Though their understanding of the topic is limited, most KIs agree that they need increased protection from cybersecurity threats.

RECOMMENDATIONS

USAID/BIH should consider the following recommendations:

- Providing financial support during the COVID-19 crisis to help independent media with a demonstrated track record of professionalism and adherence to journalistic standards, particularly to small digital and local media outlets that produce investigative stories, niche reporting or highly demanded content for their local audience.
- Enhancing capacity of the media to apply new monetization models (including proactively soliciting donations, memberships and subscriptions), adopt new business approaches and digital marketing techniques, use social network tools and platforms, strategically employ audience and performance data, and produce content tailored to specific audiences (multimedia, interactive, visual, video, podcasts).
- Supporting the media community in developing capacity to respond to pressures more effectively and more closely involve CSOs and the public. Encouraging stronger mutual support, engagement, and solidarity between CSOs, media, and citizens when confronted with political pressures.
- Fostering cross-sectoral partnerships and providing support to networking projects and joint outreach initiatives towards marketing agencies (joint ad sales networks). Supporting and funding joint initiatives and products, and capacity building and development of formal and informal networks and partnerships.
- Offering trainings to both journalists and relevant public bodies to improve reporting on the pandemic.
- Supporting a demand-side study of audience needs, habits and expectations, to inform independent media's audience engagement efforts.
- Supporting legal defense of journalists, and strengthening capacity of lawyers, prosecutors and judges engaged in such cases.
- Supporting building of cyber-security awareness and skills for selected independent online media and implementation of digital protection tools.

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