

Kosovo Media Assessment

Final Report

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The views expressed in the following assessment are those of the authors and do not necessarily reflect the opinions or policies of the U.S. Government.

Foreword

This Assessment was contracted by USAID/Kosovo to help it review and evaluate the current state of the print and broadcast media in Kosovo as well as its Kosovo Independent Media Program (KIMP) implemented by IREX (Cooperative Agreement No. 167-A-01-00107-00). The Assessment was done under the Analytical Services IQC (AEP-I-00-99-00041) by ARD, Inc.

The purpose of the Assessment is to determine the principal obstacles hindering the development of a viable, pluralistic and independent media, assess the USAID/Kosovo media assistance program, and recommend and prioritize future activities for USAID/Kosovo media support. The Scope of Work is attached as Appendix B.

The Assessment Team consisted of three experts in the media and democracy and governance (DG) sectors. The Team Leader was Sue Nelson, an expert in post-conflict international assistance programs and the former Director a.i. of USAID/Cambodia's Office of Democracy and Governance. The Senior Training and Media Specialist was Jacky Rowland, a former Balkans correspondent of the British Broadcasting Company (BBC) with expertise in post-conflict media. The Training Specialist was Dana Stinson, a Balkans expert who served as a political advisor for the United Nations Mission in Kosovo (UNMIK).

The fieldwork was done in Kosovo from February 23 to March 6, 2004, with meetings held in Washington from February 18 to 20, 2004. Interviews were conducted with USAID, other donors, IREX, media outlets, and journalists. The Team visited the Kosovo-wide television stations, newspapers, media associations, and local broadcasting outlets (Appendix A). The Team collected and reviewed the available documentation (Appendix D) and used independent researchers to monitor advertising time on national television and to gather in-depth information on critical issues such as ownership of former communal media facilities (Appendix C).

The Team was assisted in Kosovo by a researcher, Jeta Xhara of the Institute for War and by an administrator/logistician, Gresa Sefaj. Monitoring of television programming was done by Gresa Gashi, Arber Istrefi, Betim Kadriu, Anila Sefaj, Etleva Sefaj, and Aferdita Villasaliu. ARD support was provided by Stevens Tucker, Senior Associate, and Zyck Baggett, Project Manager.

We would like to thank USAID/Kosovo for its assistance, especially our Cognizant Technical Officer (CTO) Argentina Grazhdani. We would also like to thank all of those interviewed for sharing their expertise.

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Attachment 1: Summary of Findings and Recommendations submitted to USAID/Kosovo, March 5, 2004

Attachment 2: Additional Assessment Comments on Professionalism and KTV/TV21

Attachment 3: KIMP Results Framework and Indicators

Appendices

Appendix A: Contacts

Appendix B: Scope of Work

Appendix C: Methodology

Appendix D: References

Acronyms and Abbreviations

AAK	Alliance for the Future of Kosovo
AMPEK	Association of Independent Electronic Media of Kosovo
APJK	The Association of Professional Journalists of Kosovo
BBC	British Broadcasting Corporation
CIDA	Canadian International Development Agency
CoAg	Cooperative Agreement
CTO	Chief Technical Officer
DG	Democracy and Governance
EAR	European Agency for Reconstruction
EU	European Union
FES	Friedrich Ebert Stiftung
IDP	Internally displaced persons
IMC	Independent Media Commission
IFJ	International Federation of Journalists
IREX	International Research and Exchanges Board
IWPR	Institute for War and Peace Reporting
KCB	Kosovo Consolidated Budget
KIJS	Kosovo Institute of Journalism Studies
KFOS	Kosovo Foundation for Open Society
KIMP	Kosovo Independent Media Program
KTTN	Kosovo Terrestrial Transmission Network
KTV	KohaVision
NED	National Endowment for Democracy
NDI	National Democratic Institute
NGO	Non-Governmental Organization
OSCE	Organization for Security and Co-operation in Europe
OSI	Soros Foundation's Open Society Institute
PDK	Democratic Party of Kosovo
RTK	Radio Television of Kosovo
RTS	Radio Television of Serbia
SIDA	Swedish International Development Cooperation Agency
TMC	Temporary Media Commission
TV21	Television 21
UNMIK	United Nations Mission in Kosovo
UNDP	United Nations Development Program
USAID	US Agency for International Development
USG	United States Government
USOP	U.S. Office Pristina

Executive Summary

The media sector in Kosovo has made remarkable progress in its transition from a state-run¹ to a market-oriented free press. From the post-conflict emergency phase in 1999, substantial levels of donor assistance and a relatively open regulatory environment led to a proliferation of outlets. By 2001, the number of independent electronic broadcasters had reached saturation level² but subsequent reductions in donor assistance and a weak advertising market has started a process of market-based consolidation.

Donors have made a sizeable investment in the three Kosovo-wide television stations, the public television station RTK, and the private stations TV21 and KTV. RTK has a large operation, budget, and staff. It started receiving a license fee paid through electricity bills in 2004. As a result, all donor assistance to RTK television has ended except for assistance for its minority programming. The U.S. and the Soros Foundation have funded KTV and TV21, and this assistance is ongoing. Donors, including the U.S., made a substantial investment in the terrestrial transmission network, KTTN. They also provided assistance to the newspapers, local broadcast media, a news agency (KosovaLive), and for the creation of media associations.

The media in Kosovo is predominantly in the Albanian language, and this Report generally refers to the Albanian media, unless minority media is specifically mentioned. The Serb population in the north relies overwhelmingly on Serbian media for its news and information, and local Serbian language media in the north are also firmly oriented towards Belgrade. In smaller Serb enclaves in other parts of the territory, however, there are indications that local radio stations are acknowledging some common interests with the media in Kosovo.

Level Playing Field and Sustainability of Outlets

The issue of creating a level playing field between public and private television stations was consistently raised during the Assessment. This issue has polarized the media sector, colored assistance programs, and affected the content of the draft broadcast legal framework. The Assessment Team heard repeatedly from the private stations that the advertising market likely cannot sustain three Kosovo-wide television stations, and that advertising on the public station should not be allowed. The U.S. position is for zero advertising for the public station, while the Europeans have argued for mixed funding with limited advertisement time allowed. In addition, many local people and internationals argue that the private stations must stop giving cut-rate prices to advertisers (“dumping”) which undercuts Kosovo’s fledgling advertising market. Most believe such practice is possible due to USAID subsidies of the two private Kosovo-wide television stations. USAID believes that RTK also provides barter arrangements for advertising in exchange for certain programming rights and this arrangement is subsidized by user fees and funding from the Kosovo consolidated budget.

Given the lack of available data, the Team conducted an informal monitoring of the three Kosovo-wide television stations for a 24-hour period to establish the amount of time spent on advertising per station. It found that the number of seconds of advertising was evenly distributed between the three stations as was the amount of revenue those advertisements would have generated if each station had collected the amounts listed on their advertising rate cards. Assuming the period monitored was representative, the revenues calculated on an annual basis would easily cover the annual running costs for each station.

¹ First under socialist Yugoslavia and then more recently under authoritarian Serb rule.

² IREX, *Media Sustainability Index*, 2001, p 124.

Yet, the vast majority of media organizations in Kosovo have not yet become self-sustaining and those that have received high levels of donor assistance still base their future plans on the expectation of continued donor funding. At the same time, it was notable that smaller outlets that had received minimal or no international assistance were demonstrating considerable entrepreneurial spirit in looking for ways to stay afloat.

Infrastructure

Donors supported the reconstruction of the media sector and provided large amounts of equipment—especially to the three Kosovo-wide television stations and KTTN. This has met the essential broadcasting needs of the three television stations and expanded KTTN’s coverage province-wide.³ However, more training should be provided so that this equipment can be used to its full potential. A critical issue for private media is space, caused by the continuing uncertainty over the future of premises formerly owned by the state.

Editorial Content and Professionalism

Much journalism in Kosovo remains “protocol journalism” where press conferences and press releases are the stories. This is starting to change with donor-funded training courses, but the process is slow. Many media outlets have moved beyond vigilante journalism (naming and shaming alleged “war criminals” and “collaborators”), but hate speech still exists. “In Kosovo today,” wrote the Temporary Media Commissioner (TMC), “there is a volatile mixture of media. Some are dedicated to building civil society and healing a traumatized people. Some are dedicated to demagoguery and polarization of the society, to feeding suspicion and hatred.”⁴

Donors have funded a myriad of training courses for journalists, business managers, and technicians, but the results, in terms of editorial content, programming, and business management, do not reflect the size of the investment. Some USAID-funded media outlets and organizations actually resist training and IREX recommendations towards improving the quality of their product and management.

Media Standards for Kosovo

The international community has developed standards that Kosovo must meet before its final status can be determined. The media standards are detailed in Part 1, Section 1.1.6. In general, the Assessment Team found that the standards regarding the range of private media in existence along with citizen access to information were being met, but the regulatory environment was still unfinished. Partial progress has been made on the requirement that the publicly funded media provide a share of their output to minority ethnic communities. The Assessment Team thought that more needed to be done to integrate the Serbian language media in Kosovo into the general Kosovo media environment.

Conclusion

USAID’s assistance to the media sector, implemented through the International Research and Exchanges Board (IREX), directly contributed to the creation and continued functioning of two Kosovo-wide independent television stations, the terrestrial transmission network, and the news agency KosovaLive. Continued high levels of effort focused on TV21 and KTV, however, have overshadowed other important aspects of its Kosovo Independent Media Program (KIMP). This also created a

³ KTTN’s actual coverage is about 70% of the territory.

⁴ *Statement of the Temporary Media Commission*, 8 December 2003.

continuing sense of entitlement by the larger recipients that has negated, to a large extent, IREX efforts to help them become self-sufficient and to improve the quality of their product.

With the significant reduction in funding expected by USAID/Kosovo to implement its 2004-2008 strategy, the Assessment Team recommends that USAID refocus its assistance on strengthening the media as an integral system—one that provides timely and quality information to citizens and which fulfills the media's critical watchdog role. Specific recommendations for the KIMP activities are detailed in Part III, but areas that still require support include transforming the media associations into representative and effective advocates that contribute to media professionalism and self-regulation, strengthening the local outlets that serve the informational needs of their communities, and ensuring the self-sustainability of KTTN.

Status of Media in Kosovo

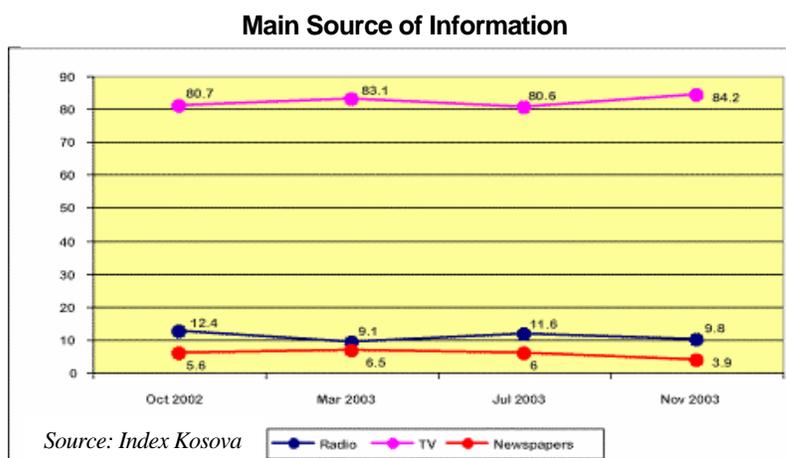
1.1 Media Environment

1.1.1 Proliferation of Media Outlets and Freedom of Expression

Until 1989, socialist Yugoslavia controlled the media and limited access to independent sources of information. From 1989-1999, media in Kosovo was dominated by Serbian language state media. A handful of independent Albanian and Serb language media outlets were permitted to operate in a semi-underground fashion. However, the atmosphere of conflict and violence led to dangerous circumstances for journalists, some of whom were physically harmed or arrested.⁵

With the end of the conflict in 1999, a large number of private radio and television broadcasters emerged and are able to operate freely, without threat of repression or censure due to language or ethnicity. Although this is a positive development, most individuals interviewed believed that Kosovo had gone from a repressed, over-regulated media environment to an under-regulated, at times chaotic, media environment.

The territory of Kosovo is approximately 10,887 square kilometers, an area about a third the size of Belgium.⁶ No recent census has been conducted, but the pre-war population was estimated at 2.2 million. Kosovo is primarily rural, and Pristina is the largest city with an estimated population of



550,000, including an estimated 200,000 internally displaced persons (IDPs) from the 1998-1999 conflict.⁷ Eighty-eight percent (88%) of Kosovars are Albanian speakers with 6% Serbian speakers.⁸ Remaining languages are Bosniak, Turkish, and Roma.

The print media has a limited circulation and most citizens rely on the electronic media

for information, specifically television (84% as noted in the Index Kosova graph.). Radio follows as the main source of information at around 10% and newspapers with around 4%.⁹ There is no editorial

⁵Human Rights Watch, Report on Humanitarian Law Violations In Kosovo 1998, www.hrw.org/reports98/kosovo/Kos9810-02.htm.

⁶Economic Reconstruction and Development in Southeastern Europe, European Commission/World Bank, <http://www.seerecon.org/kosovo/cinfo.htm>.

⁷OSCE Mission Kosovo, Municipal Profile Prishtina, October 2003.

⁸Profile/Kosovo, USAID, February 2004.

⁹Index Kosova, December 2003 Media Survey www.indexkosova.com/Publicaitons/Pub_dec03.html

control by UNMIK or the Provisional Institutions of Self-Government (PISG). Several daily papers are politically affiliated (Table 1), but the three Kosovo-wide television broadcasters and the two leading print dailies are considered impartial. The terrestrial transmission network now covers 72% of the population.¹⁰

1.1.2 Public and Private Media

There is one public Kosovo-wide broadcaster, RTK, which comprises television and two radio stations, Radio Kosova and Blue Sky. The remaining broadcasters are private and managed as businesses. Both public and private broadcasters received significant donor support and sell advertising time, leaving the media market distorted and blurring distinctions between public and private. All of the major newspapers in Kosovo are private entities, but are supported through indirect subsidies, gleaned their most important advertising revenue from international and governmental tenders.

With the reduction of donor funding, the survival of many private media outlets will depend on their ability to attract and retain private sector advertising. However, with Kosovo's weak economy, low salaries, and an unemployment rate of 60%, the local market is weak. It was also widely believed that large-scale international advertising would not enter the market until Kosovo's status had been determined.

1.1.3 Media Regulations

The Organization for Security and Cooperation in Europe (OSCE) is responsible for regulating the media and established a Temporary Media Commission (TMC) in June 2000. The TMC is independent although it receives OSCE administrative support. Under UNMIK Regulation 2000/36, the TMC temporarily licenses and regulates radio and television broadcasters. Three types of licenses are issued: a small number of Kosovo-wide broadcasting licenses, a larger number of licenses for local broadcasters, and a few low-powered frequency licenses for communities without a local broadcaster. A moratorium on issuing licenses was adopted in March 2003, although as of December 2003, limited exceptions were to be allowed for low-powered frequencies in areas without coverage of local news. The TMC also currently monitors the conduct of the print media and enforces sanctions under UNMIK Regulation 2000/37.

The UNMIK regulations were issued in response to the actions of a now defunct Albanian newspaper (*Dita*), that released the name, address, and working schedule of an ethnic Serb, UN translator who was accused by the paper of being a war criminal.¹¹ This individual was later found stabbed to death. Until that time there had been no standards or restrictions on such things as hate speech, and licenses had been issued more or less on a first-come, first-served basis. Under the regulations, the TMC has received more than 70 complaints, two of which resulted in significant fines in 2003.

Independent Media Commission Draft Legislation

A new broadcast regulation was drafted in 2002 to transform the TMC into a permanent agency, the Independent Media Commission (IMC). It will create three main IMC bodies: the Council, which will set broadcast policy; the Office of the Executive Director, which will implement broadcasting policy; and the Media Appeals Board, which will receive appeals regarding violations of license conditions and

¹⁰ According to KTTN. February 2004.

¹¹ For more information about the incident referenced here see Medienhilfe's Web reports at <http://archiv.medienhilfe.ch>

the broadcast code of conduct. It will also require the IMC to operate according to the best European practices and:

- ◆ promote a diversity of information, opinion, and entertainment on radio and television through the competitive licensing process;
- ◆ promote universal standards of ethics, civility, and decency in broadcasting by enforcing a code of broadcast conduct; and
- ◆ encourage fair competition between public and private broadcasting through regulations that balance their economic interests.¹²

The IMC draft is currently in the Prime Minister's Office. Several of those interviewed thought the draft might not be forwarded to the National Assembly for review and debate until after the elections scheduled for fall 2004. The delay is allegedly caused by concern that the media commission could be captured by political interests who would then use the commission to direct the media against their political rivals.

Supporting Legislation and Regulations

In November 2003, the National Assembly adopted UNMIK/REG/2003/32 on freedom of access to official documents. A number of international organizations, such as the National Democratic Institute (NDI), are working with ministries and citizen groups to assist the process.

In January 2004, the TMC issued guidelines for compliance with copyright provisions, including financial penalties for violations, which will come into effect on March 31, 2004. The administrative writ is aimed primarily at local television stations that broadcast pirated material.

Professional codes of conduct or standards for journalism do not exist outside UNMIK Regulations 2000/37 (print media) and 2000/36 (broadcast media). The TMC believes these codes discourage self-regulation and wants to replace them with codes drawn up by existing journalist associations. The TMC is working with members of the Association of Professional Journalists of Kosovo (AMPEK), the Association of Independent Electronic Media of Kosovo (APJK), and individual journalists to encourage self-regulation.

1.1.4 Property Issues

Kosovo is undergoing a slow process of privatization, which directly affects the media sector. Many broadcast outlets and some print media are currently located in properties where ownership is unclear. In most cases this has enabled the outlet to operate rent-free, although it has also made them hesitant to invest in their physical infrastructure due to uncertainty about how long they will be able to remain in the premises. Issues of ownership will be determined by the Kosovo Trust Association (KTA), the body set up by UNMIK to address privatization of socially owned properties. There are also problems regarding the ownership of broadcasting equipment from formerly socially owned media enterprises, particularly at a municipal level.

1.1.5 Associations

There are two Kosovo-wide associations representing media professionals, APJK and AMPEK, which receive financial assistance from USAID. The two organizations currently share office space in the IREX premises in Pristina, as well as the services of a legal advisor funded by IREX.

¹² *Statement of the Temporary Media Commissioner*, 8 December 2003.

APJK was registered as a nonprofit organization with UNMIK in November 2002 and is affiliated with the International Federation of Journalists (IFJ). Membership is open to actively employed journalists; at the time of the Assessment, 374 journalists were members. There are currently no membership fees although this is under review. The APJK is working on a Code of Conduct for journalists in a process being led by the OSCE. APJK has also acquired a large archive of books, videos, and Kosovo newspapers going back decades. It wants to establish a media resource center, for use by journalists and researchers that could be housed in the National Library or in the planned Kosovo Institute for Journalism Studies.

AMPEK was established in August 2001 by 19 owners, managers, and directors of independent electronic media, both Kosovo-wide and local, and is currently in discussions with potential new members. The Association has yet to hold an annual general meeting, although it said it planned to do so within the next few weeks. No membership fees are currently levied, although the Association said it is conscious of the need to become self-funding.

1.1.6 Standards

The determination of the final status of Kosovo depends on its adoption of standards of democratic society developed by the UN. With regard to the media sector, these are:

- ◆ A range of private, independent print and broadcast media exists, providing access to information for all communities throughout Kosovo.
- ◆ There is an independent and effective media regulatory authority, aspiring to European standards, recruited without discrimination and according to merit.
- ◆ Hate speech in any form of incitement is condemned by political leaders, the media regulatory authority, and media commentators.
- ◆ Publicly funded media devotes a full and proportional share of its resources and output to all ethnic communities.¹³

UNMIK is overseeing the standards process and will ultimately make a recommendation to the UN Security Council on whether Kosovo has successfully met the conditions for final status discussions to take place.

1.2 Independent Media

1.2.1 Background

The explosion of media resources since the end of conflict created a vibrant independent sector. Currently, there are five daily newspapers with an estimated total distribution at 24,000 (Table 1).

Table 1: Kosovo Daily Print Media¹⁴

	Koha Ditore	Zeri	Bota Sot	Epoka E Re	Kosova Sot
Ownership	Private	Private	Private	Private	Private
Independence/ Objectivity	Independent and objective	Independent and objective	Associated with political party LDK	Associated with political party PDK	Independent
Distribution	10,000	8,000	5,000	Less than 1,000	Less than 1,000

¹³ UNMIK Press Release, *Standards for Kosovo*, No. UNMIK/PR/1078, 10 December 2003.

¹⁴Data, as of 2/04, gathered from interviews with editors of *Zeri* and *Koha Ditore*, as well as Director of APJK and others.

In addition to the three Kosovo-wide television broadcasters, there are four radio broadcasters covering the whole territory, two public stations managed by RTK, and two private.

There are 85 local radio stations and 20 local television stations. An illustration of local broadcasting by major town is detailed in Table 2.

Table 2: Local Broadcast Media in Kosovo by Largest Towns¹⁵

Town/Region	Population	Radio Stations	Television Stations	Minority Broadcasters	Broadcast Languages
Pristina	550,000	7	1	2	Albanian, Serbian, and Turkish
Prizen	221,000	6	3	3	Albanian, Bosnian, Serbian, Turkish
Peja/Pec	125,000	9	2	1	Albanian, Bosnian, Serbian
Gjilan/ Gnjilane	130,000	9	5	5	Albanian, Serbian
Mitrovica	110,000	5	2	3	Albanian, Bosnian, Serbian, Turkish, Roma
Ferizaj/ Urosevac	145,000	4	2	0	Albanian

1.2.2 Editorial Content and Professionalism

After years of government control, the media in Kosovo are now abdicating decisions over editorial content to those international organizations and local bodies that issue press releases and hold news conferences. This is particularly noticeable on television news bulletins, where viewers are fed a diet of meetings, conference halls, and men-in-suits. Media professionals in Kosovo are acutely aware of the problem and have even invented a name for it: protocol journalism.

The phenomenon of protocol journalism means that newspaper columns and radio/television news bulletins are dominated by politics and politicians (such as relations between UNMIK and the PISG or the status of the dialogue between Kosovo and Belgrade). There is a serious lack of reporting on social issues that are important to citizens—health, education, technology, the environment—although there have been improvements in the coverage of business, and sport is always popular.

It is generally agreed that the Kosovo-wide broadcasters are basically fair and reasonably accurate in their reporting. However, the emphasis in the media as a whole appears to be on quantity rather than quality. There is no shortage of information on offer through Kosovo's numerous media outlets, but there are few attempts to provide context or explanation of how events impact on the lives of ordinary people.

¹⁵ Data from municipal profiles produced by the OSCE Mission in Kosovo and the TMC list of licensed broadcasters.

1.2.3 *Minority Language Media and Programming*

Despite the current dominance of Albanian media outlets, the Assessment Team found that a variety of minority-language media exist and operate freely, particularly local radio and television stations. Print resources for Serbian language media are drawn from Belgrade, while donors and private individuals have funded publications in other minority languages.

However, minority language media remain ghettoized, as do many of the readers and listeners they serve. The main obstacles they face are a lack of money and severe restrictions on freedom of movement. The OSCE has attempted to tackle the latter problem with a plan to electronically link 27 Serbian language radio stations, so that they can exchange news and information without having to move outside their enclaves. However, the project has been delayed for more than a year by technical difficulties and disagreements between the stations.

As the public broadcaster, RTK has the obligation to fill 10-15% of its airtime with programming in minority languages but, in practice, this programming accounts for barely 5% of the channel's output. It broadcasts evening news in Serbian, Bosnian, and Turkish, for 10 minutes each, one directly after the other in the hour before evening prime time begins. News in the Roma language is broadcast once weekly for 20 minutes. In addition to news, each of the minority languages is provided 45 minutes of community programming a week. One obstacle cited by RTK concerning its minority programming was training for minority-language journalists.

RTK is lobbying for a second Kosovo-wide television frequency where it could place its public service programming, including coverage of Kosovo assembly sessions and broadcasts in minority languages. This would leave its first channel free for popular entertainment programs. This may explain why its on-air logo reads *RTK 1*.

The level of viewership of RTK's minority programs is unknown, although the OSCE has commissioned Index Kosova to add this issue to its March 2004 media survey. In interviews with Serb residents, the Team found that most did not watch RTK's Serb-language programming—other than out of curiosity.¹⁶ Instead, they preferred to watch programs and news from Radio Television of Serbia (RTS) and its rebroadcast by local stations. KTV and TV21 do not broadcast any programming in minority languages, but occasionally air programs aimed at minority interests such as the return of refugees in news reports or documentaries.

1.2.4 *Media Infrastructure and Equipment*

Donors focused on rebuilding the production and transmission infrastructure for both print and broadcast media during the emergency phase of reconstruction. Most of the essential infrastructure is established; however, its maintenance and sustainability remain a constant challenge to all media in Kosovo.

Broadcast Equipment

The technical standard of broadcast equipment varies widely across Kosovo, from the state-of-the-art studios of RTK in Pristina to the spare-room operation of TV Zoom in the village of Gomje Kusce. Many television stations have a mixture of analogue and digital equipment, reflecting the patchwork nature of donations. Given the speed of technological change, this is a problem shared by broadcasters all over the world.

¹⁶ The term "curiosity" was used directly by the mayor of Zvecan municipality when interviewed, but reference to such behavior was also mentioned in the context of other interviews.

The situation is similar in many radio stations, where old reel-to-reel tape machines sit alongside computers with digital editing software. Again, this phenomenon is not exclusive to Kosovo. Radio archive material is largely stored on ¼ inch tape, and some stations are taking the opportunity to transfer these archives onto computer and CD.

Local television broadcasters appeared to be mostly self-equipped from private funding, although some were recipients of equipment provided by donors during the emergency phase. All broadcasters indicated difficulties in terms of technical training and maintenance of equipment. Minority broadcasters said their greatest problem was power cuts. As a general observation, space is a more critical issue for the media in Kosovo than equipment.

KTTN

The terrestrial broadcast system was nearly completely destroyed in the conflict. The new transmission network (KTTN) currently includes six sites and one hub. Four more sites to come on line in spring 2004 are expected to boost coverage from 72% to 81% of the territory.¹⁷

KTTN is a nongovernmental, nonprofit organization. The organization is managed by an executive director and technical staff, and is overseen by a user board made up of Kosovo-wide broadcasters. Until January 2004, KTTN was 95% supported by USAID through IREX. It planned to start collecting user fees in January 2004. The long-term sustainability of KTTN is an issue that is discussed in Part 3, Section 3.3.3.

Printing Presses and Distribution Systems

The printing and distribution of newspapers, periodicals, and books in Kosovo was historically dominated by the government-controlled publishing house, Rilindja, which used to publish a daily newspaper of the same name. Along with other former socially owned enterprises, Rilindja's future is in doubt. It still does a certain amount of printing, although its equipment is mostly out of order or out of date.

The only independent newspaper in Kosovo with its own printing facilities is *Koha Ditore*. The Koha Media Group established the printing press, on the outskirts of Pristina, before the conflict in order to ensure total control over the production of *Koha Ditore* and to enable editorial staff to extend the newspaper's deadline when there was late-breaking news. *Zeri* has a commercial agreement to print its newspaper at the Koha facilities.

Rilindja is still the main distributor of newspapers and magazines in Kosovo, charging a percentage of the cover price as its fee. Independent publications are fearful of arbitrary price increases for distribution, over which they would have no control and which could put them out of business. Newspaper houses also use privately owned vans to reach smaller, more remote places. The van owners charge a fee of 10-15% of the cover price. Newspapers and magazines are widely on sale in mini-markets across Kosovo.

1.2.5 Business Management and Marketing

Like the rest of Yugoslavia, the economy in Kosovo was weakened by Socialist mismanagement and years of international sanctions. Until 1999, there was no exposure to modern management techniques,

¹⁷ Unless otherwise noted, statistical information relating to KTTN in this Report was provided by KTTN, February 2004.

and the large international presence has distorted the local economy. The Assessment Team was repeatedly told that the advertising market in Kosovo was weak—estimated at €3.2 million.¹⁸ It also heard that large-scale international advertising would not enter the market until Kosovo’s national status had been determined. Coca-Cola visited Pristina during the Assessment, and local marketing firms said its marketing budget for Kosovo was €50,000 for this year (out of what they thought to be a potential marketing budget of €500,000).¹⁹

Most media outlets have a staff member who does the marketing for the outlet. However, few appeared to be marketing professionals, and some were juggling various responsibilities. There are several private market research and advertising companies in Kosovo. Of those interviewed for the Assessment, most appeared highly professional, with staff educated in Europe and the United States. The issues of competition, marketing, and research expertise are discussed in more depth in Part 3, Section 3.3.2.

¹⁸ This figure was used during several interviews, but is considered a very rough estimate.

¹⁹ According to City Group and CMB Public Relations.

Media Assistance

Starting in 1999, support was provided to all aspects of the media, including direct subsidies; infrastructure development; provision of equipment; technical assistance for the development of the legal framework; and training of journalists, editors, and business managers. Donor assistance peaked in 2001/2002 and has declined ever since. Most donor funding has ended in the public sector except for support for minority programming and Swiss assistance to radio. Significant funding still goes to the private sector, primarily from USAID and the Soros Foundations.

2.1 U.S. Assistance

U.S. assistance started in 1998 by the Office of Transition Initiatives (OTI), with approximately \$2.25 million in media assistance (1998-2001). OTI support included broadcasting equipment for radio and television outlets and funds for construction of the terrestrial broadcast tower at Mount Golesh. This tower is now part of KTTN.

2.1.1 USAID

The current KIMP program started in 2001 and was designed to support USAID/Kosovo's 2001-2003 strategic framework—specifically Strategic Objective (SO) No. 2.1: *Accountable and transparent governance* and its Intermediate Result (IR) 2.1.3: *Independent media and civil society free to operate*. Future assistance will support USAID's 2004-2008 strategy with media assistance contributing to SO 2.1: *Civil society and government are more effective partners to achieving good governance* and IR 2.1.1: *Better informed citizens*. Future media assistance is also expected to contribute to other Intermediate Results, in particular, IR 2.1.2: *Increased citizen influence on public policy decisions*; IR 2.1.3: *Local government is more accountable and transparent*; and IR 2.1.4: *Municipalities fulfill key functions more effectively*.

The level of funding for Kosovo is decreasing and is expected to be around \$5 million for media assistance for 2004-2008. To date, USAID's media implementation partner has been IREX.

2.1.2 IREX

IREX has implemented three USAID-funded media-assistance programs in Kosovo:

- ◆ ProMedia II/Serbia. Approximately \$186,255 spent on Kosovo activities from September 1999-June 2000.
- ◆ ProMedia II Program. \$5.4 million for the Kosovo activities from June 2000-September 2001.²⁰
- ◆ Kosovo Independent Media Program. \$7.7 million for July 2001-July 2004.

²⁰ The regional CoAg (167-A-00-00-00102-00) effective dates were June 2000-September 2003, but Kosovo activities shifted to KIMP in October 2002.

Most of the activities of the two ProMedia projects were focused on the building of media infrastructure—specifically, KTTN, KTV, TV21, and KosovaLive, which were completed by the end of the projects. These activities then rolled over into the KIMP program.

According to IREX’s current Cooperative Agreement (CoAg) with USAID, the KIMP program is designed to achieve the following Intermediate Results:²¹

- ◆ IR1: Professional Journalism. This was to be done through training, focusing on investigative journalism and business reporting.
- ◆ IR2: Supporting Institutions. This assisted the media associations AMPEK and APJK and the terrestrial transmission network of KTTN.
- ◆ IR3: Legal and Regulatory Framework. This offered pro bono legal advice and worked to develop the capacity of media associations to provide legal representation.
- ◆ IR4: Efficient Business Management. This worked with KTV, TV21, KTTN, and KosovaLive to help them operate efficiently and included the use of market research to improve sales and marketing.

In addition, KIMP provided direct support to the two Kosovo-wide private television stations, TV21 and KTV, which included equipment and the purchase of programming. Table 3 lists the approximate funding levels per activity for the KIMP program.

Table 3. IREX KIMP Funding and Activities²²

Activity	Amount (US \$) ²³
Support to TV21 and KTV Equipment, programming subsidy support	2,000,000
Training Television, radio and print ²⁴	425,000
KTTN Operations and equipment, training	800,000
KosovaLive	100,000
Business support Includes market research	200,000
Legal support	100,000
Minority media Training	80,000

2.1.3 U.S. Office of Public Diplomacy

The Public Affairs Section in USOP has provided support through small grants (up to \$24,000) to media organizations serving all ethnic groups, but with a special focus on minority language media and NGOs. The purpose of these grants is to encourage Kosovar minorities to participate more fully in Kosovo life and institutions and to promote ethnic integration and tolerance. These grants have totaled about \$300,000 a year since 1999, and about half of the funding has gone towards minority media and NGOs. Grantees have included RTV Prizern (Turkish and Bosnia), TV Mir in Lepasavic (Serbian), Radio KIM

²¹ The complete results framework is detailed in Attachment 3.

²² Through LOP.

²³ Amounts are approximate. Information provided by IREX/Kosovo.

²⁴ Training for television: \$150,000; radio: \$50,000; print: \$75,000; general news: \$75,000; and business reporting: \$100,000.

in Caglavica (Serbian), Glas Juga (Serbian newspaper), *Alem* (Bosniac magazine), *Glasnik Kosovo i Metohije* (Serbian Orthodox newspaper), and several NGO projects addressing minority community issues for Serbian, Roma, Ashkali, and other minority communities.

2.1.4 NED

The National Endowment for Democracy (NED) is a private nonprofit grant-making organization that receives an annual appropriation from Congress. In 2002, NED provided two grants to Kosovo media: \$75,000 to TV21 for salaries and \$22,000 to *Zeri* to purchase newsprint.

2.2 Other International Assistance

2.2.1 Canada

The Canadian International Development Agency (CIDA) provided media assistance until 2001. It recently provided \$100,000 for the Sesame Street program being organized by UNICEF and co-funded with the OSCE. This will be done in coordination with RTK and other regional public television broadcasters including RTS. Through the American Refugee Committee, it funds radio programming for internally displaced persons (IDPs) in Serbia, which provides them with personal information from home. This one-year pilot project started in the fall of 2003 and is done through local radio stations. Funding is €40,000.

2.2.2 European Agency for Reconstruction

EAR provided direct support to RTK in 2001 (€2.5m) and 2002 (€1.5m) to help develop a viable public service broadcaster. In 2002, it also provided €260,000 through the OSCE to support the KOSMA network (described in Section 2.2.9 below).

2.2.3 Friedrich Ebert Stiftung

FES provides small-scale assistance to the media sector, working closely with the OSCE. Its annual budget is €150,000 - 200,000, but only about 5% of that goes towards media assistance. In 2003, it supported a conference on media law with the OSCE and worked to build a dialogue between Serbian and ethnic Albanian journalists. It funded a December 2003 multi-ethnic media conference in Pristina hosted by APJK. A follow-up conference to be held in Belgrade was postponed when APJK withdrew. FES intends to reschedule the Belgrade conference but with individual journalists. It also intends to train seven to eight journalists in 2004 on the EU integration process.

2.2.4 Internews

Internews has been running a local radio cooperation project—Cross Ethnic Radio Programming in Kosovo (CERPIK)—for three years. Every week, representatives from 11 radio stations around Kosovo meet in Pristina to put together a 30-minute topical program, to which each station contributes an item and which all stations broadcast on the same day. The project brings together five Albanian, two Turkish, two Serbian, and two multi-ethnic stations in a rudimentary network, and members have extended their cooperation to include exchange of news stories several times a week.

2.2.5 Japan

Japan provided \$15.2 million for studio equipment for RTK and for transmitters for KTTN. This funding was done through a UNDP project described in Section 2.2.14 below.

2.2.6 KFOR

KFOR Psyops works with 22 local radio stations, primarily buying time for their programs. This costs about €23,643 a month for a total of 114 hours. Before the March security problems, KFOR planned to reduce the number of hours and stations in May. At that time, KFOR expected to continue with about 15 stations for a cost of around €18,000 a month, but this is being revisited.

2.2.7 Medienhilfe

This Swiss NGO supports independent media in the former Yugoslavia including Kosovo. In 2003, its Peace Building Project supported minority radio stations and minority language programming on Albanian language stations, and subsidized KosovoLive subscriptions for minority media. Its budget is around CHF 9,000.

2.2.8 Norway

The Norwegian government committed funding to a Kosovo Institute of Journalism Studies (KIJS), which will offer a two-year MA program to students who have graduated in other subjects. The curriculum has been designed in cooperation with Cardiff University, which runs a journalism program in the UK, and will be taught in large part by visiting industry professionals. The KIJS has reached agreement with the U.S. Office Pristina (USOP) to be accommodated within the premises of the American University of Kosovo. The Ministry of Education, however, has thus far refused to accredit the KIJS, on the grounds that it does not plan to run a BA course.

2.2.9 OSCE

Media assistance is provided through the OSCE Department of Media Affairs. Its core budget for 2004 is \$400,000. It has staff throughout Kosovo and provides technical assistance, training, and funding for specific projects. It does not fund any running or operational costs for broadcasters. In 2003, it conducted a number of journalist training courses including women in media and Assembly reporting.

In addition, it has a €60,000 project funded by the EAR in 2002 to create the Kosovo Media Association network (KOSMA). When operational, KOSMA will link all 27 local Serbian radio stations. The hardware infrastructure is completed and OSCE expects the network will be up and running in March 2004. KOSMA includes the development of a 20-30 minute news program produced by five core stations starting in spring 2004. KOSMA training for journalists is done by the European Centre for Broadcast Journalists, and four KOSMA technicians were trained in Italy by the transmitter manufacturer.

OSCE is working on several other media projects including a regional program, *A day in the life of a child*, led by the Children's Network in Belgrade. Another project it is co-funding with CIDA is the Albanian-language production of 52 episodes of the *Muppets go to Kosovo* done in coordination with RTK and UNICEF which will be aired starting in September 2004.

2.2.10 Press Now

This Dutch NGO has been assisting the media sector in Kosovo since 1998 with funding from the Dutch government and other donors. It helps about 10 projects per year for about €200,000 annually. This level of funding will continue through 2005. Assistance is primarily in the form of budget support and training for minority media and alternative media outlets such as Radio Urban or the magazine *Java*. Among others, it assisted the daily newspaper *Zeri* and local minority radios such as Contact and

Contact Plus. It also contributed equipment to the OB (outside broadcasting) vans of TV21 and KTV, sent consultants to the two stations, and paid for their subscriptions to AP services.

2.2.11 Soros Open Society Institute

Funding from the Kosovo Open Society Institute for media assistance ended in 2002. However, a large OSI program remains, funded from its office in Budapest. This program matches USAID funding for KTV and TV21 for 2001-2004, which comes out to around \$400,000 each a year. In addition, in 2003, OSI provided funding to Java (\$10,000), Radio Contact (\$10,000) and Contact Plus (\$23,000), and Zeri (\$46,070).

2.2.12 Sweden

SIDA (Swedish International Development Agency) supported RTK with €300,000 per year, especially its minority programming in 2001-2002. No funding was provided in 2003, as RTK did not submit a proposal. RTK did, however, submit a proposal for 2004, but the SIDA Representative in Pristina indicated it was not likely to be funded. Within SIDA's programs for human rights, the support for media assistance is decreasing, while retaining some support for multi-ethnic and minority media. SIDA also supports Balkan regional seminars for journalists.

SIDA channels about €400,000 per year to the Swedish Helsinki Committee Foundation, which is one of the main implementing partners for human rights and media in general. The Foundation has supported about 5-10 media projects in Kosovo per year. In 2002, the Foundation worked with *Zeri Daily*, *Zeri Weekly*, and the monthly women's magazine *Teuta*.

2.2.13 Switzerland

The Swiss Cooperation provided support to RTK's radio stations Radio Kosovo and Blue Sky Radio. This started in 1999 and goes through March 30, 2005. It was in five phases with the first four phases providing budget support (CHF 4 million). The fifth phase (4/01/03-3/30/05) provides program management support (CHF 400,000) and budget support (CHF 600,000) for the two radio stations. Phase V will end Swiss assistance and is designed to bridge the gap until user fees cover the radios' operating expenses. It also supports RTK television's weekly program in Roma language (about CHF 20,000).

2.2.14 UNDP

UNDP managed the \$15.2 million program *Support to Kosovo Independent Media (KIM)* that was funded by Japan as described in Section 2.2.5 above. Funds were used from 2000-2002 to provide transmission equipment to KTTN and for studio equipment for RTK (along with training for RTK on the use and maintenance of the equipment).

UNDP now provides indirect assistance to the media by mainstreaming press coverage into their development programs. It trains journalists in the content of UNDP programs, such as small arms control, and encourages investigative journalism. UNDP believes this approach has increased the quantity of media coverage on development activities as well as improving its quality.

Findings and Recommendations

3.1 Issues and Recommendations Related to the Media Environment

3.1.1 *Cultural and Political*

Kosovo's status as a UN protectorate has created some contradictions in the media sector: on the one hand, UNMIK is meant to be fostering a democratic independent media but, on the other hand, the Assessment Team heard that UNMIK is directive and can call up television stations to ensure they broadcast certain press releases or to complain that cameramen did not stay long enough at certain press conferences. In this period when Kosovo's status is undetermined, there is also some confusion among journalists as to who to interview for key issues—sometimes asking UNMIK questions that they should be addressing to the PISG.

Another issue is the lack of integration between the minority and majority language media. In addition to security concerns, cultural and political sensitivities remain. Other obstacles include gender barriers for female journalists, editors and management alike—a problem that is inherent to the patriarchal culture of Kosovo.

The KIMP program included a gender component under its *IR 4.3: Female Media Managers Achieve Parity in Professional Opportunities*. However, over three years of programming, only two activities were undertaken under this IR.

The Assessment Team recommends that minority and gender issues be addressed at the strategic level through donor emphasis, and at the programmatic level through specific activities that target equity in the media sector. Mainstreaming of minorities and gender in media should be encouraged through training and by introducing techniques such as interviewing men and women out of their traditional roles. Associations should also play an active role by addressing these issues, advocating for inclusion of women and minorities on such things as board of directors, providing opportunities for networking, and encouraging the development of balanced reporting on women's and minority issues.

3.1.2 *Legal and Regulatory Framework*

Existing UNMIK regulations were “not very well thought out”²⁵ and, because they were conceived as temporary measures, require renewal every 90 days by the UN Special Representative of the Secretary General (SRSG). Passage of the draft IMC legislation is needed not only to create the Independent Commission but also to start the process of replacing other outdated laws and codes.

In other areas of regulation, such as copyright, standards and enforcement mechanisms are slowly coming into existence. One area of concern noted by the Assessment Team was the hole left by the disbanding of OSCE's media monitoring capacity for electoral periods. Lack of monitoring and

²⁵ TMC Commissioner during our February 23, 2004 interview.

enforcement in the election cycle can leave media outlets vulnerable to pressure from various political groups. A strategy to address this issue should be worked out with international and local officials, as well as donors.

IMC Law and Implementation Issues

The IMC bill calls for members of the IMC Council, the IMC Executive Director, and the Media Appeals Board, to be selected from “civil society,” including journalist associations, human rights organizations, and other NGOs deemed to be “involved in the media sphere.”

There is a danger that local media, minority language media, women and interests outside the media elite in Pristina may find it hard to make their voices heard in the IMC. Success will depend on including a diversity of views to ensure that political or ethnic interests do not capture the regulatory body. As can be seen in the reluctance to submit the bill to the assembly before the next elections, it is a tool that is perceived by some that could be used to control the media or shut down unpopular or diverse voices. An important aspect of remaining independent will be its ability to collect a non-political source of public funding, and the draft calls for it to be financed through the collection of license fees as well as other non-political sources such as donors.

Once the IMC is established, it will need to update the regulatory and legal framework. Kosovo needs a modern anti-defamation law—the old Yugoslav legislation was primarily designed to protect officials against insults. There is criticism of Section 3:2 of the Privacy Law (prohibiting the naming of individuals accused of a crime) which many journalists believe is unworkable. The TMC believes that legislation is needed to protect minors, such as a ban on identifying children in crime stories. There is also no set of rules on court reporting (such as contempt of court, contemporaneous reporting of court cases, or a ban on publishing background material which might sway a jury).

The Assessment Team recommends:

- ◆ The USG and other donors advocate for, and provide assistance to, the TMC through their program implementers to ensure that the IMC is independent, includes representation from outside Pristina, and reflects a diversity of voices beyond the media elite.
- ◆ IREX remains engaged in the development of the media regulations through the active participation of its legal advisor and the media associations it assists.

Tariffs

The print media face significant obstacles in terms of increased production and sales costs as a result of regressive tariffs. According to those interviewed, the 15% VAT tax is applied uniformly to sales in Kosovo, including newspapers. It is also applied to the cost of advertising. In addition, import duties of 10% are applied to production materials obtained outside Kosovo (in particular newsprint). According to both *Koha Ditore* and *Zeri*, lowering VAT and customs duties on their product could significantly increase their viability in the market, ultimately leading to the creation of more jobs. It would also bring Kosovo in line with the rest of Europe, where zero-VAT or lower rates apply to printed material.

Given the negative impact of these tariffs on the affordability and accessibility of print news and information, the Assessment Team recommends that IREX work with the print outlets and related journalist associations to develop and implement an advocacy strategy for tariffs to be brought into line with European standards. This issue is also an excellent opportunity to build links between other

USAID-funded programs in the civil society and the economic sectors by including them in a coalition-based advocacy campaign.

3.1.3 *Public and Private Media*

The distinction between public and private media in Kosovo is blurred. To some extent, the public broadcaster operates as a private entrepreneur—using a marketing firm to sell advertising time, and buying and airing popular international entertainment shows, such as Hollywood movies and HBO dramas, to boost ratings and advertising rates. However, as a public broadcaster, it also receives public funding from the Kosovo Consolidated Budget (KCB) and from user fees collected through the electricity bills.

The private stations KTV and TV21 feel that RTK presents unfair competition. The U.S. position is zero advertising for public broadcasters, while the Europeans argue for a mixed funding, with limited advertising time allowed. The Assessment Team found that this issue had polarized national and international media actors and reduced the efficacy of donor assistance—particularly in relation to improving the quality of the media, strengthening media associations, and coordinating support for minority broadcasters.

The marketing aspects of private stations are discussed in Section 3.2.3 below, but in regards to the issue of private vs. public media, the Assessment Team recommends:

- ◆ Private broadcasters should focus on increasing their own profitability rather than dissipating their efforts by focusing on RTK’s potential for income. As was seen during the Assessment, when the independents improved their programming, such as TV21’s popular soap opera *Klone*, ratings improve and advertising follows.
- ◆ Assistance to the media sector should be seen as an integral program that combines the best aspects of private and public television and capitalizes on the strengths of each.

3.1.4 *Level of Media Development*

Kosovo is emerging from half a century of Communist rule, and the old domination of the state over the media is still reflected in the attitudes of many news editors and journalists. “You are dealing with people who had their CDs burned under Communism,” said the director of one private local radio station. “Their hard-drives are not re-writeable.”

There is still a prevalent feeling that media are the mouthpiece of power, resulting in the phenomenon of protocol journalism described in Part 1, Section 1.2.1 above. Media report news from the top down, not from the bottom up. Old attitudes prevail about the relationship between media and society/institutions.

In general, people do not understand the concept of public media, and tend to confuse it with state-controlled media. A number of international and local personalities interviewed by the Assessment Team said they felt that RTK shows a tendency to behave like a state broadcaster, reporting in a positive way on the activities of state institutions, although no one accused the channel of displaying any party political bias.

The media sector in Kosovo has been distorted by the involvement of international donors—in particular, enabling an artificially high number of media outlets and working journalists. Individual outlets have not established a clear identity and turnover of staff is high, making it difficult for viewers and readers to recognize the names of regular contributors.

One of the biggest challenges for Kosovo’s media sector is professionalism among journalists. Although the TMC has attempted to regulate professional standards among both broadcast and print media, journalists have not taken self-regulation or the development of standards for journalism as a requirement for their own improvement. The free media environment has led to abuse in terms of referencing unchecked sources in stories and freely reporting on individuals’ alleged actions or statements without offering a chance to comment in advance of release of a story. Donors have attempted to address these issues through support for journalist associations, but to date, “ownership” of the initiative on this issue remains with the international community.

Kosovo lacks an institution providing good vocational training for journalists. There is a private school of journalism, *Faik Konica*, which is not licensed by the Ministry of Education. The student/teacher ratio is 50:1, students are taught in overcrowded classrooms, and the school has no technical facilities although it claims to teach broadcast journalism. Students pay for courses and appear to find employment after leaving school in Kosovo’s burgeoning media industry. However, a number of media professionals contacted by the Assessment Team expressed concern about the curriculum and caliber of the academic staff.

3.1.5 Ownership of Facilities and Equipment

The issue of property ownership affects most media outlets because many of them are located in buildings or on land that was previously owned by state or municipal entities. Until ownership is determined by the KTA, many of these stations do not know if they will be able to stay in their locations, if they will be hit with high rents by the “new” owners, or if they will be forced to move to other locations. Several have plans to expand their production and broadcasting facilities, but until the ownership issue is resolved, most are unwilling to invest in improvements. A few have gambled on a successful outcome, such as TV21 and KosovaLive, making improvements without waiting. There is also the issue of ownership of formerly state-owned equipment that affects many local broadcasters.

To help address these problems, the Assessment Team recommends:

- ◆ The TMC, with the assistance of OSCE field offices, should undertake a survey of ownership issues throughout the territory as no clear data exists on the extent of this problem or how many broadcasters it affects.
- ◆ The next phase of USAID assistance should include a component that helps to address the ownership issue at the policy level, as well as to provide legal assistance for USAID-funded media resources as needed. This is also an issue that should be taken up and addressed by the USAID-funded media associations.

3.2 Issues and Recommendations Related to the Independent Media

3.2.1 Sustainability

There are several key issues related to the long-term sustainability of the independent media sector in Kosovo including competition, external assistance, and business management. Most of the recommendations for this section follow in Section 3.3.

Donor Dependence

The media market in Kosovo should be highly competitive given the scarcity of advertisers, but the Assessment Team found a sense of complacency. The outlet that appeared to be the most competitive was the public broadcaster RTK. It seems to have responded to the competition by producing the most professional local programming and by hiring professional marketing personnel. In contrast, private

outlets appeared to be the least competitive, and many continue to depend on large levels of donor support.

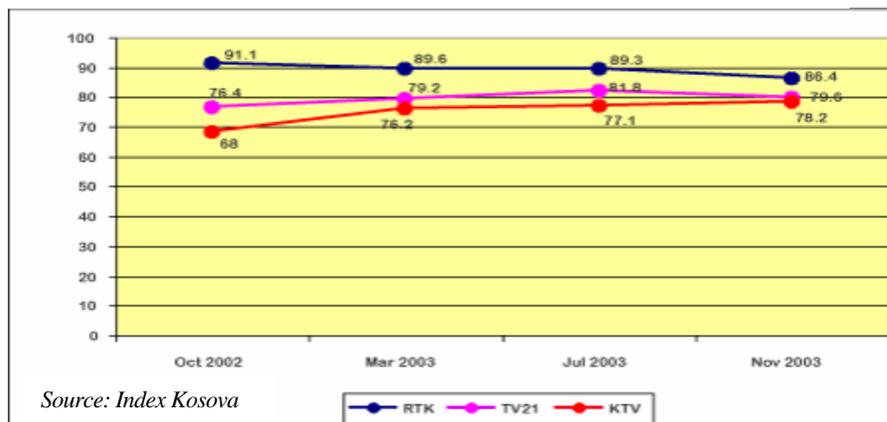
Overall, donors contributed significantly to the development of the media sector over the past four years. However, the sustained nature and size of this assistance has also contributed to a sense of entitlement and, in some cases, served as a disincentive for recipients to improve their commercial viability.

The issue of donor dependence has been a concern since the beginning. The IREX Final Report for its ProMedia II program (which ended in 2001) states: “A wide array of sources has helped independent electronic media, creating a false sense of sustainability... Stations are for the most part not operating as profitable businesses; instead, they rely on donor money support. The coming years will see a shakeout of licensed outlets ... (as) many NGOs and governments will not continue to support independent media.”²⁶ This shakeout is starting to occur among some of the radio stations cut from donor assistance early on, but it has not yet hit broadcasters that continue to receive significant levels of donor support.

Competition

The three Kosovo-wide television stations compete for audience and advertising revenue. Most of the discussion to date has focused on RTK and its ability to sell advertising time in addition to receiving public funding. The two independent stations say this is unfair especially as the weak market cannot allegedly support three stations. This issue is discussed in Advertising Market below.

Most Watched TV Channels



For other competition issues, such as piracy, TMC enforcement of the copyright regulations starting the end of March 2004 will level the playing field in favor of the Kosovo-wide television broadcasters. To date, some local television outlets

have subsisted on pirating programs, while the three Kosovo-wide stations have paid international rates for broadcasting rights.

Advertising Market

The actual strength of the advertising market is unclear as it has been significantly distorted by donor subsidies and paid programming. TV stations barter some of their advertising slots, and the private stations also provide discounted rates, both of which enable some companies to advertise on every station whether they have the advertising budget or not. This makes it difficult to calculate the actual size of the market.

²⁶ IREX, *Final Program Report, ProMedia II*, p.17

In order to get a sense of the level of advertising currently done on Kosovo-wide television and its potential for revenue, the Assessment Team monitored the three national television broadcasters for a 24-hour period on a weekday. The number of seconds of advertising per station was recorded along with the time and the advertiser. The value of the advertising for the 24-hour period was then calculated for each station based on their rate cards. (Note: This does not reflect the actual amount of revenue collected by the stations as both KTV and TV21 provide significant discounts from their published rates. In fact, USAID quarterly business reviews of the private TVs indicated that they charge 40% less than RTK.)

As can be seen in Table 4, the advertising seconds, as well as the potential daily and annual revenues, were consistent across all three stations.

Table 4: Survey of advertising time and its potential revenue

	RTK	KTV	RTV 21 ²⁷
Total seconds in 24-hour period	5,773	5,569	5,618
24-hour value of advertising calculated using published rates	€27,651	€28,450	€27,359
Potential Annual Revenue using rate card rates	€10,092,615	€10,384,250	€9,630,368

Although this was a random sample of one weekday period, the results are interesting. All three broadcasters dedicated approximately 6% of their air time to advertising, and it appears that a significant amount of revenue could be raised if advertisers paid the published rates. Even assuming that advertisers might slash their advertising if full prices were charged, it still indicates that enough revenue could be collected to cover current annual operating costs (for KTV this is \$1.4 million, and for TV21 this is €2 million).²⁸ USAID also believes these results indicate that the private stations would likely benefit to some degree from limiting advertisements on RTK.

3.2.2 Editorial Content and Professionalism

Only two newspapers in Kosovo, *Koha Ditore* and *Zeri*, meet western standards of accuracy and fairness. There is widespread criticism of *Bota Sot* and *Epoka e Re* for biased and irresponsible reporting, with international and local officials often complaining that they have been misquoted or misrepresented. Most newspapers offer little more than a repetition of the stories that were on the television news the night before, giving people little incentive to buy them. The level of readership in Kosovo is the lowest in the region.

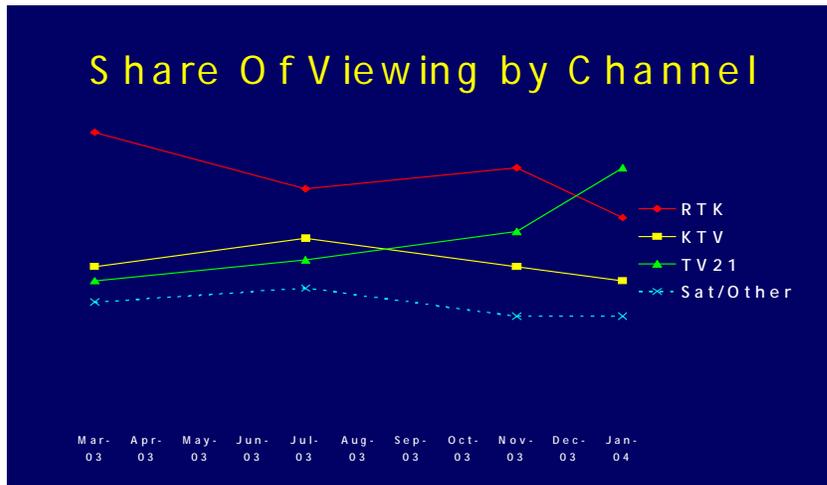
News editors and journalists are not proactive, covering news conferences and organized events, rather than searching out original stories. Even then, coverage is descriptive rather than analytical—for example, the Prime Minister’s recent trip to Italy. Television news programs reported on the people and places visited, and pronounced the trip “successful.” However, there was no analysis of how the trip was successful, what concrete results were achieved, or what the visit cost.

²⁷ The TV21 rate cards are based on programs rather than times. When program information was not available, the lowest rate on the rate card was used; thus, the potential estimated income for TV21 is higher than the amount calculated.

²⁸ These are current operating costs that can be expected to increase over time and as the stations start to pay KTTN fees and other operating costs such as rent.

RTK, TV21, and KTV are Kosovo-wide broadcasters only in terms of their license, not in terms of the stories they cover. The news on all channels is Pristina-centered; news editors do not seek out local stories in other parts of Kosovo. During visits made by the Assessment Team outside Pristina, local officials and journalists complained that the Kosovo-wide stations failed to provide a professional level of service or adequate information for citizens.

For other programming, television stations have responded to audience research by buying entertainment programs, including soap operas (“TV Novellas”), from abroad. The Kosovo-wide



channels have spent considerable sums of money acquiring series including *The West Wing* and *Sex and the City*.²⁹ TV21’s purchase of the soap opera *Klone* has pushed it ahead of RTK for viewership as shown in the chart. KTV has an agreement with the Albanian station, Top Channel, to rebroadcast hours of its entertainment programming every day.

Source: PowerPoint Presentation. Helen Harrison. March 2003

This large-scale purchasing from abroad has had a negative impact on Kosovo-based production. There are a number of small production companies but they are starved of commissions. A new Cinematography Law would provide revenue for Kosovo productions, but the draft legislation is controversial because it would charge broadcasters a fee for every movie shown on television. Some homegrown dramas/series are being broadcast, although the production values are low. These include “*Stories from the Court*” by TV21, and “*The Modern Family*,” a popular soap opera on RTK.

3.2.3 Media Infrastructure and Equipment

Broadcasting Equipment and the Need for Training

As a broad observation, the main problem facing the independent media in Kosovo is not a lack of equipment but rather lack of effective training in how to use it. This is just as true for the Kosovo-wide private television stations, where sophisticated equipment has not led to sophisticated television programs, as it has for local radio stations, where most donor equipment donations were done without follow-up.

The Assessment Team visited a number of local radio stations that had benefited from equipment donations. Almost everywhere, editors and station managers clamored for training. There is still a need for some additional equipment, for example mini-disc recorders, but this assistance should only be provided accompanied by training and include follow-up.

²⁹ Shown on RTK.

The independent media in Kosovo are not maximizing the potential of the Internet for distributing and exchanging material. The CERPIK project run by Internews (Part 2, Section 2.4) uses email groups to exchange news stories in text form. A comparatively small investment in computer software would enable independent media outlets all over Kosovo to send and receive photos and sound clips.

KTTN Infrastructure

KTTN appears to be effectively managing and maintaining its existing equipment, which provides good transmission services for its client television broadcasters. Their proposal to upgrade the system so that it is bi-directional, digitalized, and has increased microwave capacity to send voice, video, and data, is interesting. The current system works on line of sight, and a tall building can block its transmission (which is why there is incomplete coverage in Pristina).

If the upgrade went ahead, other broadcasters and networks could use the KTTN network more effectively, and KTTN could sell the extra capacity to commercial communication companies. The ultimate goal would be to improve services for existing users and expand KTTN's commercial services, leading to its financial independence.

The Assessment Team believes the proposal, costing \$2.5 million, warrants a serious examination and is something that donors may wish to co-fund.

3.2.4 *Minority Language Media and Programming*

Minority media is an area of real vulnerability in the independent media sector. In a rural culture and territory such as Kosovo, community radio is a more accessible and sustainable medium than television. It is cheaper and simpler to operate, it is faster and more immediate, and it requires fewer staff. A number of the local Albanian language radio stations visited by the Assessment Team had made efforts to provide a short daily news bulletin in at least one minority language. In some instances, however, they had been forced to abandon this service due to a lack of resources. In terms of community integration, it would be worthwhile to support these local stations in their efforts to reach out to other linguistic communities.

The Team noted a distinct difference in attitude between Serbs interviewed in northern Kosovo (north Mitrovica) and those interviewed in other parts of the province. Serb media in the north was more oriented towards Belgrade, whereas those interviewed in areas south of the Ibar River were more open to a variety of media resources. All Serbs interviewed had little information regarding the draft IMC regulation, its potential impact on their operations, or participation in selection of the IMC board. Serbs did not participate in Kosovo-based journalist or broadcaster associations, and often noted there were journalist and broadcasting associations for Serbia-Montenegro. Some minority broadcasters, particularly Serb broadcasters outside of northern Kosovo, appeared to be functioning without donor support. Others had received initial equipment support, but said their operating expenses were supported by personal funds, volunteerism, and/or selling personal announcements over the air.³⁰

The public broadcaster RTK, as discussed in Section 1.2.3, fails to deliver its full quota of minority language broadcasting, but it also uses a different “minority” studio set for the daily television news bulletins, which increases the sense of ghettoization.

³⁰ An exception was Radio Contact in Mitrovica, which seemed to exist wholly on donor support and the expectation of continued future donor support. Another was TV Most where the Team also wondered about possible Serbian support.

Cooperation between minority and majority language broadcasters is encouraged by donors, and most local stations visited by the Team agreed that such cooperation would be useful. IREX has encouraged cooperation through the KIMP program by paying for subscriptions to KosovaLive news service for a number of Serb radio stations across Kosovo. The OSCE has also encouraged networking of Serb language radio stations through its KOSMA Net program. The Assessment Team recommends that allocating a percentage of the public revenue provided to RTK for programming in minority languages should be considered.

3.2.5 Local Broadcasters and Networking

There are several informal and formal networks that include local broadcasters. One is the OSCE-funded KOSMA network (Section 2.2.9). Another is the “Network of Regional Televisions of Kosovo” that registered with UNMIK as an NGO in June 2003. This network is comprised of six local television stations: Peja/Pec, Mitrovica, Ferizaj/Urosevac, Gjakova/Djakovica, Gjilan/Gnjilane, and Prizren. They have no physical network and tapes are exchanged by bus. Advertising rates are set by the network.

There is also a Pro FM Network of five radio stations led by Radio Tema in Ferizaj and Radio Plus in Pristina. They develop collaborative marketing strategies as well as share information.

The Assessment Team found no formal relationship between the Kosovo-wide stations and the local stations, and any “cooperation” tended to be one-sided, such as the Kosovo-wide station using footage or information provided by the local station and generally not paying for it.

The Assessment Team believes that local outlets are essential elements in providing news and information to the communities they serve and that networking between the stations—both to exchange programs and business acumen—should be encouraged. It also noted the active involvement of KFOR in local stations. KFOR currently works with 22 local radio stations, and stations visited by the Assessment Team noted KFOR’s role both in terms of mentoring and in income generation from its purchase of airtime.

3.3 Issues and Recommendations Related to USAID Media Assistance

3.3.1 Strategy and Program Management

Strategy

USAID assistance to the media sector has been focused since its beginnings on the private sector and, in particular, the establishment and continued functioning of the two independent Kosovo-wide television broadcasters. This was an essential component of meeting USAID’s 2001-2003 strategic objective of *IR 2.1.3: Independent media and civil society free to operate*, which would provide independent sources of information to citizens so they could engage in the democratic processes.

USAID’s strategy, and subsequently the KIMP program design, were based on several critical assumptions. These assumptions included a strengthening economy³¹ that could provide more opportunities for marketing sales (and future sustainability) and the OSCE maintaining and managing RTK indefinitely.³²

³¹ Timeframe was not specified in the strategy.

³² USAID, *Kosovo Strategy, 2001-2003*. p. 25

The KIMP program description was an integrated media development program with a goal to “help professional and financially self-sustaining independent media provide citizens with the balanced and objective news and information necessary to participate in democratic and free market institutions.”³³

The KIMP program anticipated the following systemic results:³⁴

1. Two financially sustainable and professional private television stations broadcasting to all of Kosovo (KTV and TV21).
2. An independent, nongovernmental and financially sustainable institution (KTTN) that manages the transmission facilities for licensed, province-wide broadcasters.
3. An effective Broadcasters Association that represents its members’ legal interests before governing bodies and provides training to members.
4. A professional and sustainable news agency used by independent and public media in Pristina and the regions.
5. A core of professional, sustainable, and independent local print and broadcasting outlets that cover all major regions of Kosovo, including predominantly Serb areas.
6. Broader reporting by all media on important topics, to include business and economics reporting, women’s issues, and investigative and enterprise reporting.

Specific findings and recommendations for each of these anticipated results are presented in the following sections. In terms of media assistance strategy, however, the Assessment Team found the KIMP approach and spread of activities a reasonable one that addressed the major issues found when the project was designed in 2001.

However, in practice, the program focused on achieving the first result: the continued functioning of KTV and TV21. This approach limited attention and support to other planned activities. In addition, some of the critical assumptions that guided implementation did not hold true or were not met during the three-year implementation period—in particular, the status of RTK, which became an independent public television station to be supported by user-fees. Furthermore, the economy has not recovered, and the advertising market remains weak and cannot sustain all of the outlets³⁵ currently operating in the media sector.

Another basic assumption underlying the KIMP strategy was that the lack of independent media experience in Kosovo meant that media outlets were “more amenable to training and consulting.”³⁶ As IREX soon found out, several large beneficiaries were very amenable to grants, but not to training or accepting the need to improve.

Kosovo has moved beyond its post-war emergency and reconstruction assistance towards longer-term development needs. This shift is reflected in USAID/Kosovo’s *Strategic Plan 2004 - 2008* where media assistance is viewed as a means to promote a “synergistic partnership between a well informed and active civil society and a capable and accountable government.”³⁷ Future USAID assistance to the media sector is expected to contribute directly to *IR 2.1.1: Better informed citizens*.

³³ Cooperative Agreement No. 167-A-00-001-001070, *Program Description*, p 9.

³⁴ OpCit, p 10.

³⁵ By “all outlets,” the Assessment Team is referring to all of the province-wide and local television, radio, and newspapers currently operating or licensed.

³⁶ USAID Cooperative Agreement No. 167-A-00-01-00107 with IREX, *Program Description*, p 9.

³⁷ USAID/Kosovo, *Strategic Plan 2004-2008*, p 16.

The Assessment Team supports this strategic shift and recommends that it also be reflected in the implementation of future USAID media assistance programs. The Assessment Team recommends:

- ◆ The current focus on supporting two private Kosovo-wide television stations be broadened to include local and regional outlets, including those in minority languages, since citizens outside Pristina often turn to these outlets for their information.
- ◆ Future USAID assistance to subgrantees be conditioned upon achieving measurable performance benchmarks, such as a decreasing percentage of prime-time news on television devoted to “protocol journalism.”

Performance Indicators

The Assessment Team noted that IREX developed a comprehensive results framework with indicators (Attachment 3) that was included in the CoAg. However, except for its market-based research activity, the annual Media Sustainability Index and a few other indicators, it is not clear that IREX is tracking or reporting on these indicators. There also appears to have been no external evaluation of the USAID/Kosovo-funded media assistance programs since their inception. The Assessment Team recommends:

- ◆ Future Agreements include a monitoring and evaluation plan that tracks progress at the Agreement level as well as the activities and subgrants funded under the Agreement.
- ◆ The current Cooperative Agreement be subject to an external final evaluation, including performance-based audits for all subgrants.

Coordination

The Assessment Team found that coordination of assistance to the media sector and the development of a common assistance strategy were uneven. In some areas, coordination was good. Donors worked closely to develop the IMC legislation despite disagreement on its content. IREX coordinated closely with other organizations on particular projects, such as sharing the media market research funded under KIMP and experts with Press Now. However, in other areas the Assessment Team found little or no coordination. There was a notable divide and lack of communication between assistance programs supporting RTK and those supporting the two private sector television stations.

The Assessment Team recommends:

- ◆ USAID assistance to the media sector, in particular assistance to journalist training and the strengthening of media associations, be broadened to include public sector, minority, and local broadcast actors and be coordinated in an integral manner with other donor-funded activities.
- ◆ IREX host a quarterly coordination meeting of all media donors and implementers to ensure information is systematically shared, to ensure synergies between the different assistance programs, and to better monitor and measure program impact.

3.3.2 Private Kosovo-wide Television Support

The bulk of IREX attention and USAID’s media support has gone to the continued functioning and strengthening of KTV and TV21. Since 2001, through ProMedia II and KIMP, USAID provided \$400,000 worth of equipment a year to each station. This level of assistance was matched by the Soros Foundation in funding for operating and other costs. USAID funding was also provided for the purchase of programming, training, audits, and audience research.

According to the Cooperative Agreement, the expected strategic level result for this support is *two financially sustainable and professional private television stations broadcasting to all of Kosovo*

(*KohaVision and TV21*). On a scale from 1 to 10, IREX rated its overall achievement of this result as a 7³⁸ and its over-time achievement by component as:

- ◆ Accounting: 0 in 2001 to a 7 for KTV, and a 9 for TV21 (2004)
- ◆ Marketing: 2 in 2001 to a 7 for RTV21 and a 4 for KTV
- ◆ Scheduling: 0 in 2001 to a 7 for RTV21 and a 5 for KTV
- ◆ Business plans: 1 in 2001 to a 7
- ◆ Professional product: 3 in 2001 to about a 5

Donor Support and Sustainability

The two Kosovo-wide private television stations have been supported by donors since their creation and even today, more than half of their budgets are covered by donors. With IREX's urging and assistance, the two stations are working to become more self-sufficient and have made some progress in this regard. USAID noted that 2003 revenues for KTV and TV21 were extremely encouraging and they believe that further gains will likely be realized if advertising on RTK is limited. Furthermore, they anticipate the private stations might begin to see net gains from the Albanica Sat satellite network this year. However, a commitment to making the tough decisions and the structural changes needed to become commercially viable was not evident to the Assessment Team. It appeared that these two stations still expect USAID to provide continuing assistance at current levels through 2006.

USAID funding, and presumably the match from Soros, was given without conditions, although in 2003, IREX and the Soros Foundation started meeting quarterly with the two stations to discuss progress made towards sustainability. The two donors also insisted on funding the hiring of marketing staff. Because assistance was not conditioned, however, the stations considered other components of IREX assistance (such as training or technical assistance) as optional—accepting what they liked and ignoring what they did not. This was particularly true for training at TV21.³⁹

USOP donated a series of English-language learning programs to TV21. It came with course books that the station could sell to viewers. Given the popularity of English as a second language, USOP thinks TV21 could have generated considerable revenue by showing the course and selling the books. However, the series was never used.

Donor subsidies cannot continue indefinitely, and IREX assistance is focused towards increasing the ability of these two stations to compete and run as commercial enterprises without subsidies. It is possible that mergers or takeovers of these stations might occur when they are forced to compete without donor assistance, but this is common in market-based systems. It is also possible that new players will emerge. The Assessment Team found a line of experienced journalists and media managers waiting for the next Kosovo-wide television broadcast license to become available.

The Assessment Team considers USAID's assistance to the two television stations as an investment in the independent media sector. It does not believe that this investment would be lost if one or more of the stations were taken over or consolidated into other outlets. The investment is in the equipment, in the training of the staff, and in the years of experience gained during their operation of a Kosovo-wide television station. This investment will stay in Kosovo and serve the informational needs of Kosovars. This is the ultimate goal of any media assistance program. There is a concern by USAID, however, that

³⁸ Ratings on the 0-10 scale were done by the outgoing and incoming IREX Chiefs of Party during discussions with the Assessment Team on February 28, 2004.

³⁹ The frustrations of IREX trainers are detailed in their activity reports.

the independent nature of the stations might be lost if a takeover or consolidation occurs. They noted a case in the Ukraine, where a former USAID-supported private TV station was taken over by a local private investor. He ultimately buckled to political pressure and sold the station to persons closely affiliated with the government, and the station's editorial independence was dismantled.⁴⁰

In terms of general assistance to the independent broadcasters, the Assessment Team recommends:

- ◆ Direct assistance⁴¹ be phased down starting in July 2004 and phased out in 2005.
- ◆ Assistance must be accepted as part of a package, in which training and managerial improvements are obligatory and integral parts.

Business Management and Marketing

Recent IREX attention has been on these two areas and has had some positive results. In particular, TV21's first-time win of audience share over RTK for its prime-time soap import. IREX has started the two stations thinking in terms of business even though structural changes are still needed. Commercial training by Graham Moreland and business plan advising by Andrew Clayton have been integral to this achievement. In terms of marketing, both stations (as well as KosovaLive) hired marketing staff, but the Assessment Team found that these are not marketing professionals and require training.⁴²

Despite this progress, management of the two stations needs to be professionalized. The Assessment Team recommends:

- ◆ Marketing be contracted to professionals and daily management control be shifted from the personalities of the founders and entrusted to professionals at all levels of management.
- ◆ IREX develop a monitoring system of television advertising in order to more accurately assess the advertising market and to inform stations for their marketing strategies.

Market Research

In 2001, IREX competitively awarded its first media survey to Index Kosova, a Gallup affiliate located in Pristina. This was the "first all inclusive research conducted to accepted international research standards."⁴³ In 2003, IREX competitively awarded four quarterly media surveys to a London-based firm, Helen Harrison. IREX uses this research in its training of the stations, and the stations are using the research to make informed programming and marketing decisions.⁴⁴ The cost of the four surveys was approximately \$174,000.

With the last survey completed in January 2004, IREX proposes continuing this market research. To reduce costs, it wants to use the London-based firm to train a local survey firm, Prism (that conducted the field surveys for Harrison's surveys) so it can take over the research.

IREX makes the surveys widely available, and the Assessment Team discussed them with the media outlets and marketing firms. One marketing firm noted the results were provided in a booklet format that

⁴⁰ E-mail comments from David Black, USAID, dated March 29, 2004.

⁴¹ Direct assistance in terms of subsidy types of assistance (equipment, programming purchases, and covering operational and management costs).

⁴² IREX has plans to train these persons in marketing.

⁴³ IREX, *Final Program Report, ProMedia II/Kosovo and Montenegro*, Feb. 2003 p. 11.

⁴⁴ Although the Assessment Team noted one sleepless night that KTV still places expensive Hollywood movies so late at night that it is not attractive to viewers or advertisers.

required the manual pulling of information, while it said another survey firm, Index Kosova, was already providing more comprehensive and computerized media survey information.

The Assessment Team found Index Kosova undertakes a quarterly media survey that includes the information collected in the Harrison research as well as information on radio and newspapers. Index Kosova sells the research, along with a software program that enables instant manipulation of the data to find targeted audiences, shows, or dates and which can track data trends over time. This service costs €3,000 a quarter per user although reduced rates can be negotiated for an annual subscription or multi-users. Users can add questions to the poll for an additional fee, as was done by the OSCE that wanted Serbian language media outlets added.

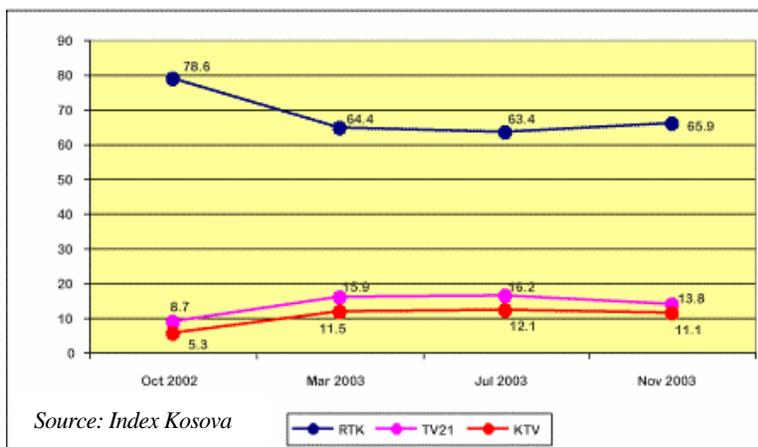
The Assessment Team recommends that USAID media assistance maintain its focus on strengthening the independent media sector in Kosovo and use existing marketing surveys instead of starting a process of capacity building for local survey organizations.

Equipment, Operations, and Quality of Programming

From 2000 to 2004, USAID provided approximately \$1.2 million worth of equipment to TV21 and KTV each.⁴⁵ Despite the equal levels of assistance, there is a glaring contrast between the equipment and facilities of TV21 and those of KTV. This is partly due to the issue of space, but discrepancies are evident in the quality and quantity of the equipment the two stations use. TV21 works out of a 1,000-sq. meter space in the annex of the Rilindja building. The television facilities include large studio space for live programs, a newsroom equipped with computer workstations, a number of digital editing suites, a cafeteria, and an executive office suite. Chromo-key is used to present sports results. According to IREX, TV21's enviable facilities are in part due to the station's methodical approach in adding on tranches of equipment that builds on its existing infrastructure.

In contrast, KTV operates out of a 250-sq. meter space in conditions that would infringe on most rules of health and safety in the workplace. The corridor has been cut in half lengthways to create editing booths which are cramped and noisy, partly due to cameramen who use what is left of the corridor as a crew-room. The news team broadcasts its television camera with autocue. The other

Most Trusted TV Station



bulletins using only one studio camera is broken and was sent to Florida for repairs. IREX admits that “substantial mistakes” were made in the initial advice given to KTV on equipment, some of which was acquired second-hand.

The journalists' association, APJK, observed: “There is a great disharmony between television technology and the ability to write a story.”⁴⁶ This is true for TV21, which is

⁴⁵ According to figures provided by IREX to the Assessment Team.

⁴⁶ APJK Annual Report for 2003

“more than a radio, less than a television.”⁴⁷ Despite its donor assistance, the Assessment Team found that TV21 continues to produce sub-standard news programs that are basically radio with pictures as “wallpaper.”

TV21 does not use its existing range of equipment to its full potential. The station’s on-air branding is weak and the accompanying music resembles “Jingle Bells.” The station uses two presenters for its prime-time news, but there is little interaction between the two. The camerawork and direction fail to exploit the large and relatively well-designed news set. The director uses alternating single shots of the presenters, which makes the studio look flat and two-dimensional. Ironically, RTV21’s short, hourly “Flash News” is more effective than its prime-time show, and is popular with viewers.

KTV—with its inferior facilities and equipment—produces a better-quality evening news program. The director squeezes the maximum variety out of the one functioning studio camera, using wide shots, mid-shots, and close-ups of the presenter. Although KTV falls into the same protocol journalism trap as other broadcasters, it covers off-diary stories and produces what is recognizable as television “packages”—footage shot on location interspersed with concise sound-bites.

In terms of programmatic improvements, the Assessment Team recommends a focus on training on how to maximize use of existing equipment, rather than buying more equipment. In particular:

- ◆ An experienced director train the studio staff at TV21 on such things as camera angles, lighting, and vision mixing.
- ◆ In-house training of cameramen and VT editors by a resident mentor/instructor who would work alongside them over an extended period (such as a month) with follow-up visits.

In terms of equipment assistance, the Assessment Team recommends

- ◆ Future equipment assistance be targeted according to need rather than based on a pre-determined level of funding.
- ◆ Updating of some of the existing equipment at KTV along with additional equipment should it acquire larger premises.
- ◆ Ensuring that all future equipment provided is suitable for the prevailing conditions in Kosovo, is easily maintained, and repairable within the region.

Program Purchasing and Local Productions

IREX purchased a substantial amount of imported programs for the two broadcasters (\$177,754 for programs for TV21 and \$157,754 for KTV).⁴⁸ Although the purchase of foreign programming has helped boost audience levels and station/market identification, the Assessment Team is unsure if this is the best use of donor funding. With the focus in USAID/Kosovo’s 2004 - 2008 strategy on better-informed citizens, the Assessment Team would look toward donor funding being used to build local production capacity and improve news production.

With the imported programming dominating the stations’ lineup, there is little attention made to local productions. The two television stations themselves produce programs that are mostly cheap, studio-based discussions/phone-in shows. Filming on location is rare. Independent production facilities are under-used and under-trained.

⁴⁷ Quote from one of the international news agencies based in Pristina.

⁴⁸ Figures provided by IREX.

The Assessment Team suggests donor funding be redirected from purchasing non-informational foreign programs towards independent in-country productions—ones that could be commissioned by the television stations to make original programming as well as informational programming.

3.3.3 Terrestrial Transmission Network Support

IREX's goal for KTTN was to develop *an independent, nongovernmental and financially sustainable institution that manages the transmission facilities for licensed, province-wide broadcasters*. IREX rated its achievement as an 8 (starting from a 2 in 2001). IREX rated KTTN's independence as a 10 (since 2001), but this is in terms of independence from the government. In terms of independence from donors and its financial sustainability, IREX rated this as a 5 (starting from a 4 in 2001). The Assessment Team believes that one of the issues donors should examine is the possibility of privatizing KTTN. However, at the same time, the independent nature of KTTN should be preserved.

One of the issues with KTTN sustainability is its board. It is currently made up of users. IREX recommends replacing the user board with a professional board of directors as it believes users will not make decisions that would increase their costs or expand services to possible competitors.

KTTN serves an important function in meeting the informational needs in Kosovo and donor investment in this network should lead to an economically viable and sustainable system. The Assessment Team recommends:

- ◆ Users serve on an advisory board but the functioning board be made up of non-users to avoid conflicts of interests and ensure impartial decision making.
- ◆ Donors seriously consider the proposed microwave capacity upgrade and other possible independent revenue-generating activities.
- ◆ IREX explore possible collaboration with, or support for, local broadcasters (Albanian and minority language-based radio and TV) in terms of their needs and KTTN infrastructure.

3.3.4 Media Association Support

IREX's objective for this assistance was *an effective Broadcasters Association that represents its members' legal interests before governing bodies and provides training to members*. IREX rated its accomplishments as an 8.5 for APJK (starting from 0 in 2001) and a 6 for AMPEK (starting from a 2 in 2001). The Assessment Team does not concur with IREX's assessment and found the associations were not fulfilling their role as a mechanism for journalists to gather and defend common interests. Neither organization charges membership dues, although both say they are studying the idea. APJK in particular doubts its members will be willing to pay subscriptions.

With IREX assistance, the associations have done some activities, including providing input into draft legislation (in particular the IMC law), campaigning on media issues (VAT, piracy), and hosted roundtables and workshops. With the help of a legal advisor supplied by IREX, they sought to put collective pressure on the authorities in a number of cases where journalists' rights were being infringed.

With IREX funding, both organizations hired executive directors. AMPEK's director is an active management professional, while APJK's is a journalist who appears to have other commitments. This lack of commitment carried through to APJK's president who told the Assessment Team that he was not convinced of the value of being in an association.

Both organizations require more development. For example, journalists accused the leadership of the APJK of using the Journalist of the Year awards to settle personal scores. Additionally, Friedrich Ebert

Stiftung said it no longer works through the APJK for conferences after the APJK executive director used a Serbian-Kosovo meeting designed to promote dialogue to rehash old wounds, and the organization backed out of a follow-up meeting to be held in Belgrade. APJK also ignored a FES offer to support a monthly press-club meeting that could be hosted by APJK.

The Assessment Team believes media associations are a critical component of a healthy media environment and recommends:

- ◆ Association management positions funded by USAID be filled by management professionals who work full time for the association.
- ◆ USAID look beyond KIMP to other USAID implementers with experience working with associations and advocacy training to help strengthen the capacity of these organizations.
- ◆ Introduce membership fees and start the phase-out of donor subsidies for operating costs.

3.3.5 Independent News Agency Support

The objective for this activity is *a professional and sustainable news agency used by independent and public media in Pristina and the regions*. The IREX assessment of their results for this activity is a 4 for sustainability (starting from a 2 in 2001) and a 7 for professional journalism (starting from a 3). KosovaLive aims to supply accurate, unbiased news from around Kosovo. It has editorial staff in Pristina and a network of stringers in most towns who email, fax, or telephone in their news stories. Access to the news agency service is through a Web site, and password protection has been a problem.

IREX provided training and equipment to KosovaLive as well as funded a staff person for marketing, yet KosovaLive still does not function as a professional news agency. It was likened to an “electronic newspaper rather than an agency” by several during the interviews. The KosovaLive team works regular office hours, which is not useful for local radio stations with breakfast news bulletins to fill, and produces only a small number of stories a day, partly due to a policy of conducting interviews in person rather than over the phone.

The agency is considered accurate but is criticized for being slow—a serious indictment for a news service. Donors pay for most of the subscription fees, particularly for local minority outlets, but this does not yet cover half its costs. It is significant that international news agencies in Kosovo such as AP and AFP do not subscribe to KosovaLive because they do not find it useful.

KosovaLive has been seeking advertising for its Web site. This is an unorthodox approach for a news agency, which generally generates revenue through subscriptions. The agency has started a business page, which it hopes to expand. Business and economic news is the most profitable operation for most news agencies, but KosovaLive will need to increase greatly its speed of delivery to run a successful business news service.

Plans are under consideration to introduce a photo service for newspapers and an audio clip service for radio stations. There may be scope for cooperation with KOSMA, the OSCE network for Serbian radio stations, as and when it becomes functional.

KosovaLive needs to become a commercial news agency, put its customers at the heart of its operations, and operate at a faster pace. The Assessment Team recommends:

- ◆ Introducing professional working practices that include a shift system to ensure round the clock, and particularly early morning, coverage.
- ◆ Sending key managers to a news agency abroad to observe a commercial agency in operation.

- ◆ Providing more intensive training to journalists in how to seek out news stories, including a system of regular check calls to emergency services and other key contacts.
- ◆ Installing radio equipment and photo software, and training on the use of that equipment, to enable KosovaLive to develop photo and audio services.

3.3.6 Independent Local Print and Broadcast Outlet Support

IREX assistance was geared towards developing *a core of professional, sustainable, and independent local print and broadcasting outlets that cover all major regions of Kosovo, including predominantly Serb areas*. IREX assistance in these areas has been minimal, and its plan to develop a regional television network was stopped at USAID request. IREX indirectly supported the journalists who worked in these outlets by inviting them to trainings and provided minimal levels of equipment. IREX thinks it could do much more to help this part of the media system, however, and remarked “they are doing a great job, we are not.”

The Assessment Team concurs with IREX. In its visits throughout Kosovo, the Team noted enthusiasm and an entrepreneurial spirit existing among local outlets, and the important role they play in ensuring the informational needs of their communities are met. The Assessment Team recommends that support for local media outlets be part of USAID’s future media assistance program.

3.3.7 Broader and More Professional Reporting Support

IREX’s last systemic-level result was to *broaden reporting by all media on important topics, to include business and economics reporting, women’s issues, and investigative and enterprise reporting*. It rates its achievements as follows:

- ◆ Business reporting: 1 in 2001 to a 9.5
- ◆ Investigative reporting: 0 in 2001 to a 2
- ◆ Women’s issues: 5 in 2001 to a 5
- ◆ Enterprise reporting: 2 in 2001 to a 5

IREX’s focus has been primarily on business reporting and it was extremely positive about the results gained from this assistance.⁴⁹ There has been much donor training in the sector as discussed in this Report; not all have been successful. The list of IREX trainings is in Attachment 2 as well as additional needs for training identified by the Assessment Team.

For future training, the Assessment Team recommends:

- ◆ Training be done in-house, where instructors work alongside journalists in their normal environment on real stories, over a period of time, followed by return visits for quality control and ongoing support.
- ◆ Working directly with editors to convince them of the value of training. Key newsroom editors could be sent for visits to local/regional newsrooms in the U.S. or UK, where they would work alongside their counterparts and learn firsthand how news programs are planned and executed.
- ◆ Offer a limited number of focused, needs-oriented workshops to journalists on special subjects such as investigative journalism, business reporting, etc.
- ◆ Developing collaborative training plans with the outlets that fit into the priorities of the outlets and that best fit into their work schedule.

⁴⁹ Although the Assessment Team heard one journalist comment that training in the Dow Jones was not what Kosovar journalists needed.

ATTACHMENT 1

Summary of Findings and Recommendations Submitted to USAID/Kosovo During the Assessment Team Debriefing

March 5, 2004

I. SUMMARY

A. Findings

The media sector in Kosovo has made substantial progress in its transition from a tightly controlled state media during Serbian rule to an open press based on competition and the free market. Independent media has burgeoned, providing citizens with numerous and diverse sources of information. The international community supported its proliferation with direct funding, equipment, training, and paid programming. Donor funding peaked around 2001 and decreased annually. Today, only USAID, OSCE, Soros Foundation, and a few international NGOs provide media assistance.

The vast majority of media organizations in Kosovo has not yet become self-sustaining and bases their future plans on the expectation of continuing substantial levels of donor funding. Meanwhile, smaller outlets that received minimal or no international assistance are demonstrating considerable entrepreneurial spirit in looking for ways to stay afloat. The media as a whole are entering a period of consolidation as commercial pressures begin to force the closure of outlets that cannot survive without external assistance.

The majority of donor assistance focused on Albanian language media and Kosovo-wide media outlets, specifically television. Some efforts have been made to increase programming in minority languages but this still remains marginal. The Serb population in the north relies overwhelmingly on Serbian media for its news and information, and Serbian language media in this part of Kosovo is also firmly oriented towards Belgrade. In smaller Serb enclaves in other parts of the territory, there are indications that small local radio stations are acknowledging some common interests with other ethnic groups in Kosovo.

Donors funded a myriad of training courses for journalists, business managers, and technicians, but the impact of these courses is not evident in the quality of the media output. Some USAID-funded media outlets and organizations are resisting parts of the IREX training and assistance geared towards improving the quality of their product and management.

Donors provided large amounts of equipment, especially to the three Kosovo-wide television stations. This has met their essential broadcasting needs, but they need more training in order to use this equipment to its full potential. There is also a critical space problem for private broadcast media in Kosovo, with continuing uncertainty as to the future of premises formerly owned by the state.

USAID has invested considerable resources in fostering two professional organizations for journalists and independent electronic media in Kosovo. Thus far, they appear to be ineffectual and not self-sustaining.

B. Recommendations

Kosovo has moved from an emergency phase towards stability since 1999; USAID programming in the media sector needs to reflect this progress. The focus on supporting two private Kosovo-wide television stations should be broadened to include local and regional outlets, including those in minority languages, since citizens outside Pristina often turn to these outlets for their information. This would enhance progress towards achieving USAID's strategic objectives, specifically *IR 2.1.1: Better Informed Citizens*.

Future USAID assistance to media in Kosovo needs to be conditional upon achieving measurable benchmarks in improving performance; for example, a decreasing percentage of prime-time news on television devoted to "protocol journalism."

The two Kosovo-wide private television stations are expecting continued substantial assistance from USAID through 2006. USAID needs to establish some parameters:

- ◆ Assistance needs to be accepted as part of a package, in which training and managerial improvements are obligatory and integral parts.
- ◆ Stations should engage marketing professionals to oversee their commercial and advertising activities, with the aim of achieving self-sustainability.
- ◆ Direct assistance should be phased out and USAID should communicate the timeline to the recipients.

USAID should refocus its priorities on equipment assistance. TV21 is already generously provided for, while KTV could benefit from some updating of existing equipment along with additional equipment should it acquire larger premises. KosovaLive's equipment should be upgraded to develop a photograph and audio capability. Individual small grants of equipment and software should be continued for local television and radio stations.

KosovaLive needs to undergo a far-reaching review of its working practices, in order to put the customer—particularly local radio stations—at the heart of its operations.

The Kosovo Terrestrial Transmission Network (KTTN) represents a large investment by international donors which meets the essential needs of citizens for access to broadcast news. It needs to become self-sustaining and thought should be given to its privatization⁵⁰ and its proposed microwave upgrade.

There is no evaluation planned for the IREX Cooperative Agreement. USAID should ensure there is an external final evaluation of all activities and subgrants, along with performance-based audits.

⁵⁰ However, it is important to maintain KTTN's independent nature.

ATTACHMENT 2

ADDITIONAL COMMENTS ON PROFESSIONALISM AND KTV/TV21

1. Additional Comments on Quality of Media

In many cases, journalists do not appear to have grasped the basics of their profession. They publish allegations without offering the individual in question the right of reply. “Impartiality” is the process of carrying a sound bite from every single political party, whatever the story. One local official noted that journalists often arrive without having researched the subject in question, and ask her to explain the story before they switch on the camera.

This problem is exacerbated by overloading inexperienced journalists with work. A journalist may have to cover several different stories in one day, which leaves little opportunity for any of these stories to be properly researched, presented, and explained. Furthermore, news editors often appear more concerned with filling a page/news bulletin, than with the quality of the story.

Technically, the independent media still have some way to go before they are producing television news bulletins that look and sound professional. Journalists make little effort to tailor their scripts according to the pictures available, and VT editors regularly commit the television “sin” of repeating shots and sequences to cover the voice track. Pictures are often pictures little more than “wallpaper” to cover a rambling script—making this little more than televised radio.

Use of sound is equally poor. Journalists and VT editors fail to use natural sound. An example viewed by the Assessment Team was the KTV report on a classical guitar concert in Pristina where the journalist talked over mute pictures and no guitar music was heard. Similar techniques are used with talking heads, so that the viewer can see a person’s mouth moving (“goldfishing”), but cannot hear what that person is saying because the journalist is narrating over the video.

Television reporters should be encouraged to make more use of the piece-to-camera or stand-up. At the moment, most news items are just pictures and voice-over, sometimes with sound bites from newsmakers, but the reporter is rarely seen in vision.

2. Additional Comments on the Capacity and Training Needs of RTV21 and KTV

Most of the independent media in Kosovo lack professional, experienced editors to give clear direction to the team of journalists. News editors require training more than anyone else, yet they are the most resistant. There appear to be many reasons why editors refuse offered training—pride, generation gap, we-don’t-have-the-resources—but without their training, there will be no noticeable improvement in the quality of news bulletins. “They don’t know what they don’t know,” was the observation of one media specialist interviewed by the Assessment Team.

The morning editorial meeting is a key event in the daily life of a professional newsroom. KTV appears to understand this and the Assessment Team found a meeting in full swing one morning when it visited the newsroom. News editors encouraged the journalists to come up with story ideas. At TV21, it was clear from a morning visit to their newsroom that the editorial meeting was not a regular event—the meeting that the Assessment Team witnessed appeared to have been put on for its benefit.

International news agencies based in Kosovo complained that the television news was often unreliable. They said they did not trust the channels sufficiently to use them as a source for an agency story.

There has been a mixed record of training provided by donors. “There were some ridiculous trainers who were laughed out and kicked out,” said Veton Surroi. “But there were other people of enormous quality who invested their knowledge here.” Some of the earliest training was provided by academics rather than journalists, and the content of the courses did not always correspond to the needs. The unfortunate side effect was to put many people off training altogether.

Bad training can be worse than useless, it can be damaging. IREX has adopted a policy of requiring its trainers to have at least 15 years of professional experience, with a preference for people who are currently working in the industry and have up-to-date knowledge.

The need for newspapers in Kosovo to publish an edition every day, and for television stations to broadcast a news bulletin every evening, makes it impractical to attempt blanket training, which would put large journalists out of action for a week or more. Training should be needs-oriented; it should preferably result in work that can be published/broadcast, with follow-up afterwards.

There is considerable scope for regional cooperation in the field of training—this peer assistance may be more palatable to some news editors. The independent media in Bosnia-Herzegovina are several years further down the road of development, and exchange visits could be fruitful and encouraging for journalists from Kosovo. In the end, it would be desirable for training to be done by Kosovars. The OSCE already conducted a “training of trainers” to develop a pool of potential trainers. An organization that might help with this type of training is one supported by USAID in Albania—the Albanian National Training, Technical Assistance and Resource Center.

Table 1: IREX Training by Type⁵¹

2002							
Investigative	Business	Management	Marketing	News	Technical	Other	Total
1 (6.25%)	1 (6.25%)	2 (12.5%)	1 (6.25%)	3 (18.75%)	3 (25%)	4 (25%)	16
2003							
Investigative	Business	Management	Marketing	News	Technical	Other	Total
1 (4%)	3 (12.5%)	4 (17%)	4 (17%)	3 (12.5%)	2 (8%)	7 (29%)	24

⁵¹ All data above was taken from IREX quarterly reports submitted to USAID.

Table 2: Consultant Trainers Used by IREX in the KIMP Program⁵²

2002		2003	
Name	Expertise	Name	Expertise
Julian Davies	<i>Business Planning</i>	Adam Najberg (2)	<i>Business reporting</i>
Ted Illiff (2)	<i>Internet & Wire News</i>	Graeme Moreland (2)	<i>TV sales, promotion & programming</i>
Richard McClear	<i>Radio Needs Assessment</i>	Delina Fico	<i>Training Needs</i>
Susan McCelar	<i>Radio Needs Assessment</i>	Peter Williams	<i>Equipment Needs</i>
Andrew Clayton	<i>Business Reporting</i>	Andrew Clayton (3)	<i>Business reporting</i>
Tony Hawson	<i>Investigative Journalism</i>	Janina Hrebickova	<i>News research</i>
Mark Milstein	<i>Photo Journalism</i>	Graham Addicott	<i>News & Documentary</i>
Graham Addicott	<i>Production & Editorial</i>	Helen Harrison (4)	<i>TV Viewer surveys</i>
Julian Tarrant	<i>Management & Editorial</i>	Matt Shelley	<i>Station Operation Scheduling</i>
Helen Harrison	<i>TV Viewer Survey</i>	Leslie Abdela (2)	<i>Gender Issues, Minority Programming</i>
Adam Najberg	<i>Business Reporting</i>	Collin McIntry	<i>Environmental Reporting</i>
Tony Impey	<i>Camera Training</i>	Richard McClear	<i>Radio Reporting</i>
Xama Artunes	<i>Feature Writing</i>	Russell Peasgood	<i>TV News Production</i>
Pamela Taylor	<i>Women & Media</i>	Graham Addicott	<i>Investigative Reporting</i>
		Bill Wigmore	<i>Investigative Reporting</i>
		Mark Milstein	<i>Photojournalism</i>
		David Bellin	<i>Business Advertising</i>

⁵² All data in this table is taken from IREX quarterly reports submitted to USAID.

ATTACHMENT 3

KIMP Results Framework

APPENDIX A

CONTACTS

Washington

IREX

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Mark Whitehouse, Director, Media Development Division

USAID

David Black, Former Civil Society/Media Advisor, USAID/Kosovo
Peter Graves, Senior Media Advisor, Bureau for Europe and Eurasia

U.S. State Department

Craig Lang, Kosovo Desk Officer

Kosovo

Pristina

Agence France Presse

Beni Qena, Correspondent

Associated Press

Fisnik Abrashi, Chief Correspondent
Tina Kraja, Correspondent

Association of Independent Electronic Media of Kosovo (AMPEK)

Aferdita Kelmendi, President
Visar Hoti, Vice President (based in Ferizaj/Urosevac)
Ardita Zejnullahu, Executive Director

Association of Professional Journalists (APJK)

Nasser Miftari, President
Baton Haxchiu, Executive Director

Bota Sot

Bajrush Morina, Deputy Editor

British Office

Ruairi O'Connell, 2nd Secretary Political
Selvije Fetahu, Political Assistant

Canadian International Development Agency

Tamara Sorger, Head of Aid

City Group

Genc Meraku, Chief Executive Officer

CMB Public Relations

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Hyshi Kuka

Epoka e Re

Muhamet Mavraj, Chief Editor
Jeton and Sebahate, Journalists

European Agency for Reconstruction

Nurten Demiri, Information and Communication Unit
Driton Zhubi, Information and Communication Unit

"Faik Konica" School

Ramiz Kelmendi, Dean

Friedrich Ebert Stiftung

Besa Lusha, Resident Representative

Index Kosova

Visar Berisha, Managing Director
Vlora Basha, Project Manager

Individuals

Ardian Arifaj, Former Koha Ditore Editor
Evliana Berani, Media Consultant (formerly IREX Senior Media Advisor)
Remye Hoxlej, Master's Candidate in Media, Viadrina University, Frankfurt
Rina Meta, journalist on "Java" and student at "Faik Konica"
Ilir Tolaj, Independent Producer, former TV21

Init Productions

Alush Gashi, Executive Producer
Albian Gatica, Art Director

International Crisis Group

Ardian Arifaj, Analyst

Internews

Faik Ispahiu, Managing Director

IREX

Keith Hayes, Outgoing Chief of Party
Matt Shelley, Incoming Chief of Party and Senior Media Advisor
Jill Jarvey (IREX/Washington)

Japanese Office

Arta Agani

KFOR

Major Jeffrey Chapman, KFOR Psyop Commander

Koha Ditore

Veton Surroi, Director of Koha Media Group
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KosovaLive News Agency

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Kosovo Foundation for Open Society

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KTA

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OSCE

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Angela Tenbruck, Programme Officer/Team Leader, Media and Journalism Support Team,
Department of Democratization
Sven Lindholm, Spokesman

Press Now

Albana Shala, Netherlands-based Media Program Coordinator, Albania and Kosovo

Prime Minister's Office

Mimoza Kusari, Spokesperson
Hamdi Sopi, Media Adviser

Pristina Film

Blerim Gjoci, Owner

Radio Urban FM

Dardau Islumi, Owner and Director

Radio Kosova

Avni Spahiu, Head

RTK

Smajl Smaka, Deputy Director of Television
Fatmir Bajrami, Cameraman
Fatos Bytyci, Investigative Journalist
Alma Lama, Journalist
Mufail Limani, Head of News
Syleyman Shogin, Head of Minority Language Department

RTV 21

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Antigona Baxhaku, Journalist
Eugen Saraqini, Director of News and Sport

Swedish International Development Agency

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Zeri

Blerim Shala, Editor-in-Chief

Ferizaj/Urosevac

Radio Tema

Visar Hoti, General Manager

Gjilan/Gnjilane

Municipality

Shemaji Hyseni, Deputy
Lufi Haziri, Head, Municipality Executive Body

OSCE

Srdan Antiv, Media and Democratization Officer

TV Zoom

Susana Makic, Owner

Klllokot/Klokot

Radio Klokot

Nikola Stolic, Owner

Mitrovica

Radio Contact Plus

Valentina Cukic, Director
Petar Miletic, Journalist/Editor

Peja/Pec

Radio Peja

Khavit Husaj, Director and Editor-in-Chief

RTV Dukagjini

Feim Kurhasani, Editor-in-Chief
Dhuranta Kaba, Radio Dukagjini

Prizren

Radio Helix

Haki Krasniji, Director

TV Prizren

Mifail Bytyqi, Director

UNMIK

Karen Tchalian, Senior Political Advisor

Zvecan

TV Most

Miletic Veroljub, Producer

APPENDIX B

SCOPE OF WORK

Purpose of Assessment

The purpose of the assessment is to determine the principal obstacles that hinder the development of a viable, pluralistic and independent media, to briefly evaluate the Mission's current media program activities, and to recommend future activities to develop and strengthen Kosovo's independent broadcast and print media.

Background

Support for media is an important prong of U.S. democracy and governance assistance. Access to information is essential to the health of democracy because it ensures that citizens make responsible, informed choices rather than acting out of ignorance or misinformation and information serves as a “checking function” by ensuring that elected representatives uphold their oaths of office and carry out the wishes of those who elected them. Therefore, one of USAID’s strategic objectives is the increased development of a politically active civil society.

The USAID/Kosovo Mission strategy for the period 2004-2008 was formally approved in August 2003. The existence of vibrant, sustainable, pluralistic and independent media is essential to achievement of elements of USAID strategy, and contributes to many others. Media development falls under Strategic Objective (SO) 2.1 – *A civil society and government that are more effective partners in achieving good governance*, and is a key component of achieving three of the four SO 2.1 Intermediate Results: IR 2.1.1 Better informed citizens; IR 2.1.2 Increased citizen influence on public policy; and IR 2.1.3 Local governance is more accountable and transparent.

IR 2.1.1: Better informed citizens

Effective citizen participation and interaction with the government require citizens to be sufficiently informed about their rights and responsibilities, and aware of important political, economic, and social reforms. The level of citizen awareness in Kosovo today, however, is quite low. Better informed citizens are more likely to become engaged in the political process, understand and support key reforms and policies, and demand government accountability.

IR 2.1.2: Increased citizen influence on public policy

As Kosovars build new institutions of self-governance, citizen influence on public policies will help ensure that new systems are sufficiently transparent and accountable, and that policy priorities reflect the interests of more than just a political elite. Given the lack of expertise and capacity within the government, civil society input will contribute to the development of more informed and representative policy making processes.

IR 2.1.3: Local government is more accountable and transparent

Kosovo lacks experience with democratic practices, the concept of public service is weak, nepotism is widely practiced, corruption undermines political and economic development, oversight mechanisms are inadequate, and the potential exists for a significant increase in corrupt practices. Improving

accountability and transparency, therefore, is essential to achieving good governance, especially at the local level.

Traditionally, USAID has supported media programs that strengthen media associations, shape the legal and regulatory environment, improve business viability, and increase media professionalism. In Kosovo, USAID's current media program consists of all four activities. The Kosovo Independent Media Program implemented by IREX, is designed to ensure a sustainable media environment, with a level playing field for public and private television broadcasters to compete; a self-regulatory environment in print media; a regulatory framework that fosters freedom of speech; improved media business viability; and increased professional reporting skills in both print and broadcast media. IREX supports two Kosovo-wide private television stations, major local radio stations, and the Kosovo-wide news agency focusing on improving the quality of their program and newscasts and their ability to become viable and profitable businesses; work with specialty niche reporters for improving quality of their reporting; and work with the media associations so that they all become watchdogs for protecting freedom of expression.

However, the independent broadcast media continue to face a number of challenges, including a weak advertising environment, competition with the heavily subsidized public television, an incomplete legal and regulatory environment, weak supporting institutions, and inexperience with investigative journalism, business management, journalist ethics, marketing and other skills. The development of strong independent broadcast media remains an essential component in the overall development of democracy in Kosovo.

Statement of work

Specific Tasks

The contractor will undertake the work required to produce a report that:

- (1) Assesses the current state of the print and broadcast media in Kosovo;
- (2) Determines the principal obstacles that hinder the development of independent media;
- (3) Briefly evaluates the Mission's current media program activities; and
- (4) Recommends and prioritizes areas that need to be addressed to assist the development of independent print and/or broadcast media in Kosovo.

The report shall include:

- (1) A summary of the overall media environment in Kosovo, including general judgments about the prospects for changes in media and related organizations.
- (2) The current status of independent media in Kosovo, including:
 - Quality of journalism, including current training programs available for print and broadcast media;
 - Business practices of private media organizations;
 - Legal environment as relates to media issues, including laws that protect journalists;
 - Regulatory environment, including mechanisms for licensing and regulating media, and enforcement of violations (e.g., hate speech);

-
- Healthy competition, including the impact of public broadcasting on the privates, the role of non-Kosovar regional media in Kosovo, municipal ownership of radio stations, etc.;
 - Availability and quality of news and information, Kosovo specific news in minority languages, investigative journalism; and
 - Media infrastructure including transmission towers, KTTN, cable, satellite, print presses, and distribution systems.
- (3) A description and appraisal of problems faced by Kosovar media. This section may include anecdotal comments made by journalists, publishers and media owners.
 - (4) A review of the Mission's current media program activities and specific judgments about progress toward achievement of the relevant targets and indicators in USAID/Kosovo strategy.
 - (5) An assessment of the quality and effectiveness of coordination with OSCE and other donor media programs.
 - (6) Recommendations for future media assistance, including a summary of short-term and long-term recommendations and a description of how media development will complement and support other USAID objectives.

APPENDIX C

METHODOLOGY

The Assessment was done from February 18 through March 6, 2004.

Week One

The Team prepared for the field work by reviewing background documentation and meeting with USAID, State Department and IREX Representatives in Washington.

Week Two

The Team briefed USAID/Kosovo and started its initial meetings with IREX, media outlets, USOP, media associations, and other donors. Six researchers were hired to track advertising time on the three Kosovo-wide television stations. These stations were monitored from noon February 26 through noon February 27.

Week Three

The Team started the week with a mid-term debriefing of USAID/Kosovo and continued its meetings in Pristina. It undertook field visits to media outlets outside of Pristina including Mitrovitica. It ended the fieldwork with a debriefing for USAID/Kosovo and submission of its draft summary of findings and recommendations.

During this time, the Team met with the organizations and outlets listed in Appendix A and reviewed the available documentation listed in Appendix D. The results of the advertising monitoring were calculated and included in this report.

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