



**DEVELOPMENT
RESEARCH
TRAINING**

MEDIA PICTURE OF BOSNIA AND HERZEGOVINA IN 1995

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REPORT
ABOUT THE COMPLETION OF THE PROJECT
"MEDIA PICTURE IN BOSNIA AND HERZEGOVINA

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INTRODUCTION

SOROS Media Centar financed the project of making data base of media in Bosnia and Herzegovina. Media plan prepared and realized the project. The following persons were engaged on the project: Zoran Udovičić, head of the project, Prof. Dr. Muhamed Nuhić and Radivoje Budalić. Prof. Dr. Rudi Stojak, ing. Miroslav Močinić, ing. Peter Skert, ing Enes Jakić and economist Izudin Isović were consulted for respective sections of the project. Operative associate on project was ing. Silva Vujović. Computer backing was done by SOROS Media Center, and computer program made ing. Enes Jakić. Final report was completed on August 25, 1995.

1. THE AIM OF THE RESEARCH

Until this research, the least complete picture of media in B&H did not exist. Before the war no projects of this kind were made.

The primary aim of this research was to determine the following data for every observed media:

- status (registration data, legal position, contact persons and addresses);
- holder status (property, organization);
- financial situation (relation towards market, financial means, main expenditures); scope of radio and television program, the interval of publishing for press media;
- audience, TV viewer rating, reading public (realistically and evaluation);
- contents and structure of media (according to form and style);
- internal organization, and organization of editing and production;
- staff;
- resources and contribution of information;
- technical potential, and technology applied (according to type of equipment and standards);
- problems and difficulties that media do encounter
- plans and perspectives

Gathered data have manifold usefulness. They offer classification of media, information about contact persons; elements for insight into editorial approach; information about professional standards and technology; information about behavior on

the market, and attitude of media towards development; and finally quantity and quality indicators for research media trends in respective media groups, or settings.

Secondary, but not minor objective of research, was to obtain comprehensive media picture; or at least trends of operation, and the perspectives of development. This aim was set up on condition. At the very start it was limited with many problems, that research workers could not surpass. They were unable to visit certain areas and media, because of war operations, and because of the restricted areas, that stand under the control of HVO. One should also ascertain the lack of two essential elements of such research. There was no monitoring of the program; which is relevant for evaluation of accomplished editorial policy. Also, the research of the audience, which is relevant for evaluation of the effective influence of media is missing. Thence, research team oriented to point to some aspect in this area; and to indicate trends, that may be recognized subsequently, founded on the information, that was given by media voluntarily.

Presupposed framework with which the research team started was:

- In B&H, even in the war, many media are functioning. Save speculatively; there is no other reliable information about their number, program and editorial orientation, technique and technology, and their concept of development. Competent state ministry has the information, that 157 new newspapers, reviews and journals, and 53 radio and TV stations were registered, from the beginning of the war, on the territory of B&H. (That is on the territory under the control of legal B&H authorities, respectively B&H Army.) (January 1995). Information how many media are actually active is very uncertain.

- Media suffered great damages. Their premises were destroyed and occupied. They were deprived of their staff, and of any firm financial funds. Finally, media suffered also through the communication blockade. Nevertheless, in a sense, one can notice media burst of growth: new private radio and TV stations emerge. New newspapers and reviews are being published. Realistically: This phenomenon is short-lived. Perhaps the war is not the only explanation for it.

- Since there is no market on the whole, there is no media market either. Lack of media market, changes the picture of independence, hinders true competition, and does not stimulate contest for quality.

- The situation with staff in most media is critical. In editorial offices work mostly young, industrious, but inexperienced journalist, with little professional knowledge.

- The break through of modern, and amateur journalism exists at the same time. Widespread professional, and technique-technology standards are not being observed.
- Legislative, for electronic media first of all, are insufficient and old. They do not incite the establishing of modern system of electronic media.
- The owners' incentives for the establishing and continuation of media are not known; either the ambitions in the peace time, or in the period of at least relative stability.
- Prevailing confusion exists about the idea of "independence." This category is limited with different terms, that are not standard. Top criterion for reporter's freedom - his independence of state, is too narrow to judge, to what extent are our media being used.
- All presumption could either be proved, or rejected in this research, because the monitoring of program, and research of audience has not been done. With pretty much reliability, we may point at some features and trends.

We will attempt to answer, at least partly, four questions, that characterize global media picture in separate media systems:

- assessment of the situation for every media independently;
- professional proficiency of media and media systems in B&H;
- elements for appreciation of author's independence and autonomy;
- legal and financial status;
- perspectives for development

2. SUBJECT MATTER OF RESEARCH

Research team had the task to make media picture in four big cities in B&H: Sarajevo, Tuzla, Zenica and Mostar. These cities may in a way; represent the prevalent media situation in the country. The research workers, who found themselves on the site, had the opportunity to contact certain media outside these centers, so the research was expanded to several localities, that could be reached then. So the complete information for 115 media from Sarajevo, Visoko, Kakanj, Breza, Zenica, Maglaj, Tuzla, Lukavac, Mostar and Konjic was added to database. Primary estimation was that in four B&H centers, there are about 70 newspapers, radio and TV stations active, but research disclosed their number to be considerably higher. When the research was finished, we received the information about number of active media, that are given in "the classification" of media.

Beside the survey of active media, the research workers studied also the documentation and registration of public media in governmental register. (Ministry for education, science, culture and sport) Governmental administration for telecommunications, competent to allocate radio frequencies, did not accept cooperation. Relevant legislative was studied. Media were surveyed according to following classification:

- radio stations: public stations in Republic, public stations in districts-counties, local(community) public stations, private commercial and private non-commercial stations;
- TV stations: public stations in the Republic, public stations in districts-counties, local(community) public stations, private commercial and private non-commercial stations;
- Newspapers, reviews, magazines and journals of all sorts -- daily, several times in a week, weekly, every ten day, once a fortnight, monthly, and the magazines that are published occasionally, with certain continuation.
- news agencies -- general, and specialized

All press media, that appeared in 1995, relatively regularly, with specific commentary to what extend did they keep up with planned period of publishing, were treated as active media. As active radio and TV station were treated those stations, that till the moment of survey did not have intermission longer, than 3 months.

Radio Television B&H, that is, Radio B&H, Television B&H, and Radio Sarajevo 202, was treated as specific media system. Information obtained from RTV B&H; according to many criteria; are not comparable with other part of electronic media system; thus they do not constitute the part of comparative research. Summary about RTV B&H should be made independently. This institution was not of primary interest to the purchaser of the research. Data from the survey about RTV B&H, and summaries based upon them, were used in the analysis of the system of so called small electronic media. That was done to the extent, to which Radio Television B&H is relevant for their performance, and development.

3. RESEARCH METHODS

Poll, interview, and insight into documents, were used as method of research. For electronic media, as addition to questionnaire, program scheme was attached, and for

those who did the probe of the audience -- written results of the research. Some media contributed, compulsory, their program concepts, projects for development, etc.

Different questionnaires were made for each type of media. These questionnaires encompassed near 60 questions in 11 global areas. These questions' had to be answered either affirmative or negative; choosing one or more modifications. One could reply numerically, or in percentages, ranking importance of facts; and in a descriptive way. Each chapter included brief remark for unexpected, and specific situations; what proved to be very useful. Questions were partly equated with the statistics' nomenclature of R B&H State institute for statistics; also with standards of processing statistics by EBU/UER, and European Federation of Publishers.

Authors of the questionnaire were in the most cases, examiners -- research workers themselves. The answers were given solely by surveyed ones, according to the degree of their knowledge, and responsibility for giving data. Interviewers trained them to apprehend the questions, and through their professional knowledge insured respect of verified methodology. Thence answers in questionnaire represent "classification" of media. Research workers required corrections of answers at site; but only then, when the polled ones digressed from the foreseen methodology; stated polemic or illogical answers; that is answers with visible insufficiency.

Assessment of one media lasted at least three hours. On some occasions the research workers remained in media even two -- three days. Each poll was accompanied by the interview with the responsible business, journalist, and technical member of the staff. From the interview; descriptive picture about problems and future development had been obtained. In some instances this picture is very brief. That means; that in those organizations; there was no greater inclination for such kind of interview.

The summary of every questionnaire contains short brief of given answers. In most cases the summary contains researcher's independent opinion about some aspects of that media, that he acquired through complex insight in the activity of the media, and apart from questionnaire.

Objective evaluation about all dimensions of individual media, will be possible only after the monitoring of program, and audience research.

4. LIMITS IN THE RESEARCH WORK

Project had clearly many restraints, that influenced the use of planned methodology, character of data base, and analytical evaluation of trends in media. Those limitations are the following:

- The research was conducted in war circumstances, and visits to the areas outside Sarajevo, at the time of heavy fights, influenced the access to those areas, and the quality of interviews in media.

- Restriction to only four cities, and then certain expansion according to the principle, "where we can get too," does not make B&H media picture representative enough. Nevertheless, 75% of total media organization were included, what gives important accuracy to the summary. The possibility to complete media infrastructure till nearly 100% exists, should this task be resumed continually.

- We did not have the possibility to include in the research the media in the area of so called Herzeg Bosnia.

- Emphasizing the SOROS foundation as purchaser of the project, caused different reactions in different media. Some media tried to guess what could be the "taste," and interest of SOROS, by glorifying, or coloring with black tones their situation; the others openly refused to take part in the poll.

- Several media stressed, that some information is business classified, and asked for its protection.

- Relevant media, such as "Dani", "Hrvatska Riječ" and CD Radio Zenica, refused to take part in the project. Two media, "NRTV Studio 99" and "Radio 99," refused also to great extent to take part in the project. Their reasons were different. However, main data about these media are included in media "classification."

- With some managers, and editors in chief, we encountered lack of interest, and culture of public presentation of media. This kind of survey, the media all over the world recognize as a chance for public presentation, what in many instances was not the case with this project. Notwithstanding all our efforts, using our private connections, and the reputation in those media, we were not able to get the answers to all relevant questions. There are several reasons for that. Lack of interest for this kind of presentation; declaring

information as business classified; long absence of the person, who knows the answers to the questions. (Those were mainly engineers, who work on computer programs, transmitters, and maintenance of the equipment.)

- In some media several functions are reduced to that extent, that it is impossible to get any kind of answer. However, the data that we collected are valuable. They offer basis for summaries about each media separately, and general trends in media. After this project, the research team acquired experiences, that will be valuable in the approach, and the research, should it be requested from the team to continue with the work on these, or similar projects.

5. THE RESULTS OF THE RESEARCH

The research was conducted in Sarajevo, Visoko, Kakanj, Breza, Zenica, Maglaj, Tuzla, Lukavac, Mostar, and Konjic. The research encompassed 119 media: 83 press media, 20 radio stations, 13 TV stations, and 3 news agencies (conclusive with July 1995). "Media Plan," whose associates worked on this project, estimates, that on the whole territory of B&H (mostly in the towns, not encompassed by the research), there are additional 50 media companies active. Out of that number, there are 22 newspapers and magazines in 7 towns, 23 radio stations in 22 towns, 4 new TV stations, and one new news agency (conclusive with August 1995). The research did not encompass these media. The basic information about these media is given in the segment "classification of media."

Thus one can conclude with precision; that in the first half of 1995; on the territory of Bosnia and Herzegovina; under the control of legal B&H authorities; that is, B&H Army;(the city of Sarajevo, and 30 communities) following media were active:

One hundred five newspapers, reviews and magazines. The newspapers published by military headquarters, corps, as well as other military newspapers, had not been observed;

43 radio stations;

17 TV stations;

Four news agencies.

The results of research consist of following segments, of which each one was processed, and stored:

- data base for each media separately; including descriptive observations about problems, possibilities for development, and short evaluation -- summary,
- program for later structural processing of data,
- report, with the analysis of media trends
- statistic comparable indexes
- cumulative classification of media
- other documentation (schemes, probe, etc.).

5.1. THE RESULTS OF RADIO RESEARCH

The research encompassed eighteen radio stations: Radio Breza, Radio Konjic, Radio Lukavac, Radio Maglaj, Radio Mostar, Radio Studio 99, Sarajevo, Radio Arkadija, Sarajevo, Radio Hayat, Sarajevo, Radio M, Sarajevo, Radio Vrhbosna, Sarajevo, Radio Stari grad, Sarajevo, Radio Zid, Sarajevo, Radio Kameleon, Tuzla, Radio Hayat, Tuzla, Radio Tuzla, Radio AB, Visoko, Radio NABA, Visoko and Radio Zenica. The survey was performed in nine towns, that are on the free territory of B&H.

Radio Studio 99 answered only one part of the questions. That is why it was examined separately. (Because of the specific position in the society, Radio B&H and Radio "Sarajevo 202, that function within the system of the public enterprise RTV B&H, were not the subject of the research. They were also not compared with other stations, although they were subject of wider individual research of media.)

5.1.1. Public and legal status

The majority of observed radio stations is independent, and has status of legal subjects (11). The other stations function within public RTV enterprises, people's universities, and houses of culture (most often together with TV station), or within affiliated radio company (Hayat Sarajevo and Hayat Tuzla). The survey showed; that with the increase of stations in certain areas; media competition on a local level is increasing.

There are more private-commercial stations (9), than the public (local, canton) ones. Five radio stations broadcast the program, although they have not registered with competent state ministry, while seven do not have frequency license. The war stimulated the establishing of new radio stations. Establishing of pluralism of ownership in media, is certainly an important factor in the process of establishing new radio stations. One half of the surveyed stations are privately owned. Five are state owned stations, and four have mixed ownership. The founders of observed radio stations are most often physical person. Follow state, and enterprise-association. The tendency of different forms of ownership is present. This is the result of not finished transition of state ownership; but also of insufficiently regulated relations between private persons, who have money, and the state (communal authorities), which insure legal position of broadcasting company. Among radio stations, that we could not analyze, the majority consists of those, that are successors of former communal radio stations. Their property position, and relations towards commune are rather vague. Interdependence of private and civic (state) can be noticed also in the relationship of private proprietor, and political parties as the founders. Five radio stations are organized as public enterprise (independent, or within public enterprise, that have several functions). Five are organized as stock company (in mixed, and private ownership), and four as company with restricted responsibility (in private and mixed ownership), and company of one person.

Owners'-founders' rights are mostly stated through the establishing of development, and business policy (13), appointment of manager, and editor in chief (12), and planning and control of approved program orientation. With some radio stations, that interest goes so far, as to the appointing of editorial offices, and hiring the associates in the program (5).

All radio stations have program of general kind, except Radio M, which asserts to be music radio program. The program is aimed mainly to the widest possible audience. Only two radio stations produce program, that is intended for youth (Radio Kameleon and Radio Hayat Tuzla), and one produces program intended for civic population (Radio Zid).

Lack of broadcasting system reflects mostly in the area of legislature. Absence of legislature (criteria) for planning and allotment of frequencies, as the common good, and limited natural resource, hinders establishing of consistent media scene in the conditions of free market, competition and (pluralism of) ownership. One should add: the question of licenses is almost not regulated at all. The protocols for broadcasting the program from

other (foreign) radio stations; plus the whole segment of author copyrights is also not regulated. One can not neglect the international dimension of this problem. All that is eroding the very roots, and blocking the growth of radio stations in present conditions. Therefore it is quite understandable, that the majority of radio stations are in favor of legal regulation of this matter. That would mean conceiving public basis for the functioning, and the development of entire broadcasting system.

5.1.2. Professional development of media

A Program

In the assessment of professional-media development of radio stations, the basic criterion is program, as final product, and result of the engaging of program, production-technique, and financial potential of a station. All observed stations have basis of professional editorial staff, and most of them production department and management also. One half of the stations have professional marketing department (with mostly one employee), and several stations have program library, too. The departments for audience research and development are still not present, as a primary function in radio stations.

In the composition of program, there is relatively higher percentage of music programs, compared with music-informative programs, and especially informative programs. Only in Radio Hayat Sarajevo, the informative program is the dominant program, in the relation to other program categories. All stations have news, entertainment, and culture programs. Other program forms are less developed, and their percentage in the program varies from station to station. However, one can conclude, that programs for youth, children and advertisement programs, are more developed than sport, education and science programs. The most lacking is drama program (that program, only in a rudiment, broadcast five stations). This fact is in close connection with the complexity of this program, and with the high production price. All program categories are broadcast only by Radio Kameleon, and Radio Hayat Sarajevo. Radio Arkadija and Radio Vrhbosna have very simple program structure.

Daily continuity in broadcasting of the program mastered all radio stations. Eight radio stations broadcast program for 24 hours. Nonetheless, material development of program is not in correlation with essential development. Certain expansion of news

portion of program is partly result of (war) conditions, during which the survey was done. Programs dealing with internal affairs are very much present in most stations. Follow programs dealing with war, foreign affairs, economy and culture. Only Radio Arkadija and Radio M do not have political programs or programs dealing with war. The greatest presence of historical subjects is on Radio Hayat Tuzla (25%). If we consider programs, that provide help to the population (service information, existential questions, and practical advises) as separate segment; then we can conclude, that in one third of the stations, these programs are the most common ones.

The majority of radio stations broadcasts more national music (9), than the international music (7). In Radio Tuzla, that percentage is equal. Pop-rock music comes before folk music. Eleven surveyed stations broadcast mostly pop-rock music (Radio Arkadija 95%), and six stations broadcast folk music (Radio NABA 100%). Traditional folk music is represented more, than newly composed music. The greatest number of stations broadcast classical music and music for children, but their participation in the program hardly exceeds symbolic limit. When international music is concerned, Anglo-Saxon music prevails in programs, and then follow Italian, French, Spanish, German, Turkish and Arabic music. Radio Vrhbosna broadcast Croatian music; Radio NABA broadcasts exclusively Turkish, and Arabic music. Pop music is predominant in entertainment music, while the presence of other styles is relatively poised (except for heavy metal). Regarding surveyed stations, only Radio Arkadija, according to the editorial standards, broadcasts music from all parts of former Yugoslavia.

One can observe professional development of media also, regarding the presence of certain kinds, and groups of program.

All stations have contact programs. That tells about the efforts to establish direct, and effective contact with audience. (The quality level of that communication is unexplored.) Almost all stations broadcast news and open studio program (15) More than one third has special program about the army. Eight stations claim to have direct radio broadcast of the events; but technical facilities, show that by direct broadcast these stations mean, reporting by phone. Development of correspondents' network should be observed in the context of communication blockade, and in the context of complete social circumstances. Seven observed stations have their correspondents in the country. Six stations have their correspondents abroad. The most developed correspondents' networks

have Radio Zid (15), Radio Hayat Sarajevo (13), and Radio Mostar (11). The correspondents are mainly associates, who occasionally send their reports by phone. One third of the stations produces programs in English, while Radio Hayat Sarajevo broadcasts in English, Turkish, Albanian, Arabic and Persian language. Proofreading of the program is not sufficiently developed. Only one third of the stations does the proofreading of their program, while others do that from time to time, or not at all.

The growth and the structure of the sources of information are determined by the circumstances in the state. Communications blockade essentially reduced their number, and determined the way of use. In the first place come immediate contacts with the events. They are accompanied by the monitoring of the program of local and foreign RTV stations. Follow, local news agencies (ONASA, B&H PRESS, RTV B&H), state and army press service, and foreign news agencies, and stations (CNN, HRT, MTV, RTL, BBC, TGRT, RFI, Slobodna Evropa, Glas Amerike, Deutsche Welle).

B. Staff

Surveyed 18 local radio stations have totally 257 employees. The greatest number of employees has Radio Mostar (31), and the least Radio Arkadija (2). From the total amount of employees, about 50% are journalists, and about 27% are engineers and technicians. The rest are employees in other professions, and in administration. The number of part time employees in the program surpasses the number of professional journalists. Some radio stations depend mostly on volunteers. Often, the number of professional staff, and their structure, do not correspond with the growth of program, because the hiring of the staff is conditioned with regulations about working obligation.

More than one half of journalists finished university (53%), and every fourth journalist finished Faculty for journalism. The representation of sex structure probably does not correspond to the one in time of peace. More than one half of employees are women. Age structure is very good. More than one half of employees are younger than 25 years old, and only six are over 50. National structure seen through the total number of employed journalists is: Bosnians 83%, Croats 10,5%, Serbs 6% and the rest is from other nationalities. The training is mainly done through practice, and rarely through the help of internal schools, and seminars. Only three stations (Radio M, Radio Mostar and Radio Zid) organize also the study trips abroad.

The results of the research show that the staff is something one can not do without. The staff that is missing the most are journalists of all kinds, than technicians, engineers and interpreters. Only Radio NABA was resolute in the answer, that they do not lack in any kind of staff, while three out of 18 observed stations did not answer that question at all.

C Equipment

Nine radio stations have studio and control room in one room; six have studios for broadcast; while only one observed station has drama studio. (There are no studios for the production of music programs.) According to production capacities'; one can conclude; the stations are generally equipped for playback of music programs, for production of news programs, and talk programs with smaller number of participants.

About one fourth of the equipment for production, and reproduction of the program is of professional quality. The other part of the equipment is half-professional, or produced for home use. With that equipment certain quality of program can be achieved, but the reliability is very bad. The equipment was mainly produced for the reproduction of pre-recorded material, and less for own production, especially of more complex programs. As for modern equipment, only one station has CD recorder, and twelve stations have CD players. More than half of the equipment is five or more years old. That shows very high level of amortization. Ten stations broadcast in stereo, and eight in mono. That points out at relatively low, and uneven technical quality of program. The weakest points in technical equipment of the most of the stations are transmitters. Five stations have medium wave (AM) transmitters of 1 or 2 kilowatts (only two of these are the property of the stations). All radio stations have FM transmitters. One third of them was made by stations themselves. According to the estimations, only one half of the transmitters satisfy minimum of technical standards. The measuring of the frequency spectrum (that was done by professional team from RTV B&H), showed improper emitting from greater part of local transmitters. These transmitters "dirty spectra," and interfere with the reception of other stations. Only one third of analysed stations have professional antennas with greater gain. Link system is very modestly developed. Radio Hayat Sarajevo and Radio Hayat Tuzla use link (probably PTT network) for the production of joint program, on the wider territory of Republic. Satellite receivers are being used to take over the news or to re-broadcast the music from

satellite channels. Only five of observed stations cover to some extent the wider part of Republic. The coverage of the whole canton has only Radio Zenica (AM totally, FM partially), and Radio Hayat Sarajevo (FM). Five stations cover the territory of the canton partially. The total coverage of the town has thirteen stations (three with double coverage). Seven stations has total coverage of the commune. Studio 99 did not give technical data. The aim of the coverage is primarily territory; and with the most part of Sarajevo private radio stations, the aim is optimal group. That confirms the judgment; the competition leads to greater program differentiation of the stations.

Only two among observed stations, Radio NABA and Radio Stari Grad, have computers with the possibility to use Windows (386 and better). Other radio stations have computers with lesser possibilities.

Own, mainly emergency, maintenance has most of the stations (the exceptions are Radio M and Radio Breza). All stations except Radio Kameleon have priority in electrical supplies, while five stations own aggregate, as a reserve power supply.

5.1.3. Elements of independence -- autonomy

Every estimation regarding independence and autonomy of media, that pretends to have professional validity, must have as assumption the existence of high quality program elements of each station. That can be achieved only through special research, that is to say through monitoring of the program content. This survey is therefore only the view from outside; and from the distance, of media situation on the level of program activities, explained by subjects themselves.

One does not have to stress that war, as the extreme social situation in itself, influences to great extent the nature of media. That assertion refers even to the radio stations that produce program lacking political and war subjects (Radio Arkadija and Radio M). The basis of editorial policy, according to the statement of surveyed, in the most stations, is editor in chief. Almost in all editorial offices, editorial board participates in program policy, but their participation is rarely of primary importance (Radio Tuzla, and Radio Hayat Tuzla). In smaller number of stations; the owner appears as the subject of editorial policy; whereby in four out of 18 surveyed stations; his role is the key one. Managers participate in the same way, and all other factors have lower place on the scale

of influence. Program councils do not exist, or if they do, their role is not developed (the exception is Radio Hayat Sarajevo). The role of administrative boards is rather marginal. The role of the proprietor, and of managing structures is the greatest in Radio Mostar, although all other subjects of editorial policy participate too. The employed journalists, and the editorial offices have the greatest influence in Radio Tuzla, and Radio Hayat Tuzla (relatively small influence of editor in chief). Operative editorial decision makes editor in chief in most part of stations, and journalists and editorial board participate in that to great extent.

In some stations the greatest roles in program decisions have managers and the owners; especially in those where one person exercises' two, or even three the most responsible functions in radio station.

The claims of the proprietors -- founders are mostly expressed in establishing growth and business policy (13), appointment of manager (12), appointment of editor in chief (11), and in establishing and control of program editorial policy (11).

In some stations those rights go so far as to the appointment of whole editorial offices, even to the hiring the part time associates in program (5).

The proprietor is at the same time the manager, and the editor in chief in Radio AB, Radio Arkadija, and Radio Stari grad. On the other hand, that is the case in all private media.

A little more than three quarters of observed stations claim that journalists have full freedom to choose the themes, and to express their point of view. Two thirds of stations, in the case of different interpretation of some controversial event, opt for combining several different sources. One third of stations opts for the source that is closest to the state authorities. One can make objective evaluation of this kind of attitude, only through the monitoring of program content.

Audience research made until now only four stations: Radio Hayat Sarajevo, Radio M, Radio Maglaj, and Radio Zid. The influence of the audience on the program is accomplished mainly through direct participation of the listeners in the program, and less through letters.

One third of surveyed stations broadcasts program on Bosnian language. Four stations broadcast on Bosnian language, and on the languages of their journalists and authors. One station broadcasts on Bosnian language, and the languages of journalists and associates. Five stations have the widest possible language tolerance, using language according to the choice of journalists, authors and associates. The most part of surveyed stations broadcasts religious programs. (The exceptions are Radio Arkadija, Radio Kameleon, and Radio Zid.) Six stations broadcasts programs of several religions, and seven stations broadcast programs of only one religion (six of Islamic and one of catholic religion). Only Radio Konjic and Radio Lukavac have editorial offices with journalists from all nationalities, while eight stations have editorial offices with representatives from only one nation. (In other stations, journalists from two nations are employed.) Studio 99 did not give information on this.

Financial situation of local radio stations certainly reflects (although not in very recognizable way), to the degree of independence of the media. The income from advertisements, and other incomes represent the most dynamic, although not the biggest source of financing.

Still, the relative value of that income is more symbolic than real, if seen in the light of total financial effect.

The capital of the proprietor, looking on the whole, is the greatest source of income. With five stations it is high above one half of total income. Local stations, that were founded by districts, receive state funds. Radio Hayat Sarajevo and Radio Hayat Tuzla, among observed stations, use foreign donations as their main source of income. Studio 99 did not give information about that.

The research affirms the assumption, that larger media competition on local level, stimulates the pushing through of independent media position. (The examples in Sarajevo, and Tuzla where several local stations are active.)

5.1.4. Financial status

The majority of the stations are in a very bad, and undefined financial position; what is greatly the result of the war, and of the lack of economy and media market. Between surveyed radio stations, only Radio NABA had positive financial result in 1995.

More than one half of the stations had negative financial result, and one third was on the very edge of profitability.

The structure of income reflects the complexity of financial situation. Only Radio Breza says, that they received funds from the state. That does not agree with the number of stations, whose founders are district authorities. According to the amount of participation, the most important sources of income are the funds of the proprietor. (This category is not well defined.) These funds in five surveyed stations amount to more than half of the total income. In the case of Radio Vrhbosna, and Radio AB, those are the only sources of income. The profits from advertisements, represent important source of income for two thirds of observed stations. In six stations, they amount to more than 50% of total income, and in Radio Zenica they are the only means of financing. Services to third person, and additional activities practice lesser number of stations (5). In the structure of income, the domestic donations are less present, than the foreign ones, which in the case of Radio Hayat Tuzla and Radio Hayat Sarajevo are the main source of income.

The war situation lead to disproportion, and different absurdity in the production costs of radio stations. In the structure of expenses, in most radio stations, dominant place have the costs of purchasing the equipment. On the second place are the costs of raw material, and spare parts, although they are not prevailing. Relatively high positioned are the wages and fees, that change, from being absolutely prevailing, to being the lowest category of expenses. As a rule, private commercial stations pay salaries and fees more regularly.

Two thirds of stations indicated the expenses for the use of power, and somewhat less number indicated the expenses for the use of phone, and other post office costs. Only one third of radio stations indicated the costs of renting the space, what contradicts the fact, that only four radio stations own their working space. The expenses of acquirement of program, and of copyright show only three stations. All that suggests the conclusion that in the war many financial (legal) obligations are not being accomplished, and that the existing picture could not be applied to the situation in peace.

Investing is present in two thirds of surveyed stations. For that mostly donations were used (9), less the funds of the proprietor (7), and the least own financial funds (6). In three commercial stations the investments were covered with own financial funds, and donations. Generally, one can say that in present situation; the stations have very low firm rate of production; and especially low extended production.

5.1.5 Summary

Former model "one district -- one radio station," that stem out as result of old political organization, submits in front of the new situation. This new situation is characterized with the plurality of media scene, and the competition and market that are more potential, than real. In essence, old fashioned attribute proprietor- founder can not be rejected, simply because one can not ignore inherited social-legal situation, in which the process of transformation has not been executed to the end. That results in solutions in which the elements of the old and new are present.

Such situation further complicates the lack of wider legal basis for broadcasting. The research confirmed the assumption, that present legislature is insufficient, and that it should be developed in concordance with the regulations in democratic society. The lack of regulations does not enlarge the possibility for freedom of action of radio stations, what eventually one could think. The most urgent are the regulations for distribution of frequencies, copyrights. Other questions are important, too; especially the ones that have international effects. In addition to that there is also the establishing of control mechanisms for implementation of regulations, to prevent actual variety regarding registration, distribution of frequency licenses, organization of stations, etc.

Relative genuine development of program does not comply with fundamental development. Program offer prefers daily political themes, and the most simple program forms. Accessibility of sources of information (and program) is sometimes the main factor of program editorial policy. The appearance of several stations in the cities (Sarajevo, Tuzla, Zenica, Visoko) bears new quality: competition, and in the long run that will pave the road towards independent, and autonomous position of these radio stations, more strongly, than any other factor.

Present situation regarding the staff is not the real sign of present potential of the society. All potential is now dedicated to the requirements of the defense of the country. However, evidently the staff is the limiting factor in the development of radio media. In post-war period the request for certain program, and technical groups will be especially big. Therefore every investment -- sporadic or systematic -- in a long run will prove to be socially justified.

Undeveloped technical substructure in most radio stations, shows that they are better equipped for broadcasting of pre-recorded programs, than for the production of the programs. The equipment for transmission (and the links) does not satisfy even elementary technical norms, what influences the quality of signal, and reduces the field of coverage. It is very important to standardize the equipment at certain level of quality. That would enable the cohesion of technical system, and create better conditions (financial and other) for future investment.

Financial results of radio stations reflect all complexity of their financial situation in the war, and of the uncertainty in peace. In global financial picture, there is almost no difference between public and commercial stations. The rights and the obligations of the state are not defined. The possibility of commercial valuation is uncertain, in the situation where there is no free market. The independent character of media has yet to assert itself, and to be evaluate on the market.

5.2. RESULTS OF TELEVISION SURVEY

The subject of survey was twelve TV stations: TV Studio Kakanj, TV Konjic, TV Lukavac, TV Maglaj, TV Mostar, TV Studio 99 Sarajevo, TV Hayat Sarajevo, TV Studio FS-3 Tuzla, TV district Tuzla, TV Tuzla, TV Visoko, and TV Zetel, Zenica. These TV stations function in nine towns, on the free territory of B&H (three are in Tuzla, and two in Sarajevo). One should warn; TV Studio 99 gave only general information; so that in greater part it was not the subject of comparative analysis. The information about TV Mostar, that will soon start to broadcast, was taken from the accepted project. The information about TV Konjic refers to the period in which this station did broadcast the program. At the moment this station does not broadcast the program.

(Wider survey encompassed also TV B&H, but it was not the subject of comparative research. The reason for that is the specific position in the society, and

disproportion in the development of infrastructure of this station related to other TV stations.)

5.2.1. Social and legal status

Most television stations started to broadcast during the war. Only three among surveyed stations: TV Hayat, TV Studio FS-3, and TV Zetel, started to broadcast a year or two before the war. That actually, leads to the conclusion, that the process of establishing local TV stations in B&H is at the very beginning. It is essentially related to the general process of democratization of society. The pluralism of media scene neutralized state monopoly TV, that substituted, for a long time, total needs, in contrast to the radio, that had somewhat deferent process of development.

The process of registration with responsible ministry has not been finished yet, although some TV stations have been broadcasting for two or three years now. Three TV stations do not have the main registration, while greater number of TV stations does not have frequency license for broadcasting. Five stations broadcasts on the leased frequency, mainly on RTV B&H transmitters, and not always with the agreement of the proprietor. In all cases these are stations of public, local, or canton character, whose founders are communal, respectively district authorities. Looked from a wider point of view, the use of frequencies is connected with two main problems. On one side there are no regulations (criteria) for allotment of frequencies. On the other side, it has not been decided yet who will be responsible to make the innovation of existing frequency plans, respectively the corresponding professional measurements.

In the period of political monism, that was the responsibility of RTV B&H. Changed social conditions did not result in adequate legal regulations. That created legal void, and slowed down the process of establishing the pluralism on media scene.

Seven surveyed stations are legally independent firms. The others function within other legal firms; mostly within local radio, or local press (TV Studio FS-3 Tuzla), that is, working as constituent of houses for culture, and people's universities, established as public enterprises. The state appears as founder -- proprietor in most cases (5), then the enterprise -- society (5), individual person (2), and in one case association of citizens.

Five surveyed stations are organized as public enterprise (or as constituent part of public enterprise, that has several public functions). Two are organized as stock company, two as stock company with limited responsibility, and one as the company of one person (TV Zetel). One TV station has completely undefined legal status. It should be stressed; TV Mostar is the only public station; whose owner is not the state. (The owner is Foundation "Free Mostar".) This is specific solution, based on American experiences, where the character of ownership does not define the character of station. It is not clear is this decision deliberate, or imposed. In system of ownership relations, and legal status of stations, various elements interfere, and that causes certain confusion. There is evident tendency of TV stations, that broadcast in canton centers; and that were founded by community or district authorities, to strive to become future canton stations (Mostar, Tuzla). That is often being done in the interdependence with local radio stations, using the model of state RTV B&H. All that is happening in relatively uncontrolled way, because there are no regulations on the level of Republic/Federation, and canton.

There are three main categories of TV stations. One category is the private commercial stations (5), the other is local public stations (5), and the third is district (canton) public stations (2). All TV stations have general program categories, although with some certain program categories are particularly stressed (TV Hayat -- movie and entertainment, TV Kakanj religion-education, TV district Tuzla -- news and political program, TV Zetel -- entertainment -- education).

Most stations do not have contracts with foreign satellite stations, whose programs they re-broadcast. TV Hayat and TV Studio Kakanj claim they solved that problem only partially. One half of the stations do not have licenses for broadcasting foreign movies and series; while the other half claim that they have regulated that matter partially. Program piracy can only partly be excused with war circumstances. Actually, that problem is connected with legal act about copyrights, particularly when the movies, music and theater are concerned. One should not neglect the international connotations. The need of legal act when copyrights are concerned is evident, as well as the establishing of control mechanisms.

The request expressed by almost all TV stations for legislation in broadcasting, for allotment of frequencies, and for legislation for mass media, prove this conclusion to be

true. Enacting the laws is chief supposition for the development of electronic media, and for establishing of coherent broadcasting system in B&H.

5.2.2. Professional development of media

A) Program

Professional and media adequacy of TV stations was observed on three levels: program, staff, and technique.

All observed stations, except for TV Maglaj, broadcast program every day. The level of program offer was surveyed from the point of view of quantity, and structure of program. We did not estimate the qualities of media offer; because that would mean special research of the content of program. The most developed program structure; independent from the origin of program; have TV Hayat, TV Studio Kakanj, TV Tuzla and TV Maglaj. These TV stations have all main program categories. The greatest amount of broadcast program has TV Hayat (average 17 hours daily), what is more than TV B&H broadcasts during the war. On second and third place are TV Zetel and TV Tuzla. They broadcast eight hours of program daily. TV Lukavac and District Tuzla broadcast in average only 2 hours of program daily. NTV Studio 99 did not give the information how many hours of program do it broadcast.

Organization of the program offer varies very much compared with the total of broadcasted program (independent from its origin), and with the produced program. Looking at whole, the most developed segment is news program, movies and entertainment segment of program, and then follow sport, education and children's program. Five stations have the greatest participation of news program in their program (TV district Tuzla 80%); four - movies, series (between 30 and 50%). TV Hayat has movies, series and entertainment program equally divided (22%), and TV Maglaj has the same proportion of news and movies (20%).

The greatest own production has TV Studio Kakanj (80%), while the greatest use of foreign production has TV Konjic (80%).

Most of TV stations re-broadcast program from satellite stations. In that program dominate music, sport ,and then follow news, entertainment, and movies. The satellite programs that are generally re-broadcasted are MTV, Eurosport, CNN, RTL, SKY, SAT, DSF, Euronews, ARD.

In the structure of own production, the most developed are news and documentary program, while the least developed is drama program that is practically not produced at all, due to high production and financial demands.

TV Visoko has the greatest percentage of children's programs. These programs are produced by that station. In the news, one third is dedicated to internal issues, then follow issues about the war, economy, questions important for the population, etc. The character and the structure of the source of information is influenced by the communication blockade, and the needs of the defense of the country. From local sources TV stations use, mostly, the information from B&H PRESS, ONASA and RTV B&H, as well as press services of army corps. From foreign sources the information is used from CNN, SKY, MTV, ARD, EURO-NEWS, HRT. Important sources of information are foreign radio stations, that broadcast in our language.

In music programs prevail entertainment music at six TV stations, folk music in TV Kakanj, while TV Lukavac and TV District Tuzla have equal proportion of entertainment, and folk music. Only TV Konjic broadcasts exclusively entertainment music. In foreign music programs, prevail Anglo-Saxon music (9 stations), and then follow Italian, Spanish, French, Arabic, German and Turkish music. When the territory of former Yugoslavia is concerned, all stations broadcast Croatian music, less Slovenian and Macedonian, while three stations broadcast music from Sandžak and Kosovo.

One half of the stations have proofreading of the program, while others do that only sporadically.

B) Staff

Most stations have professionally organized departments, technical department, library and administration, while the departments for the research of audience have only TV Hayat and TV Mostar. In 11 surveyed local stations, there are 266 employed persons.

The greatest number of employees have TV Studio Kakanj (58), and TV Hayat (52). The least number has TV Studio FS-3 Tuzla (8). As with radio, here also, the number of employed people often does not depend on how much is the program developed. In surveyed TV stations there are 86 journalists (32% of all employed). TV Kakanj has the greatest number of journalists (18). Other program staff is represented in lesser degree, while technical-engineering staff is represented at almost same level as journalists (only 10 engineers). Administrative staff makes average of 10%. The number of part time associates is almost the same as the number of permanently employed journalists. The greatest number of part time associates has TV Studio FS-3 Tuzla (25).

The level of education of the journalists is better than with radio stations. About 63% of journalists have university degree (29% finished Faculty for journalism). Most parts of journalists are younger: 90% are under 35 years of age (38% are under 25). Only one journalist has more than 50 years. National structure expresses multi-ethnic character of B&H to the extent permitted by war situation. About 80% of journalists are Bosnians; 12% Croats; 3,5% Serbs; and 5,5% other nationality. All stations alert about the actual problem of competent program and technical staff. Lack of journalists is particularly evident, then of cutters, technicians, cameramen, editors, lectors, announcers, directors, and other different technical staff.

C) Technique

Technical level of the equipment that TV stations have, shows the time and the conditions in which they were established. Technical foundation of most stations consists mainly of half-professional and amateur equipment. Standards and manufacturers are often being mixed. The result is low technical level of program (picture), especially of movies and other programs, that are being mostly transmitted from VHF. The best technical quality has re broadcasted satellite program, no matter that the technical basis for the reception of the signal is inadequate.

All 12 stations together have 50 (mainly mobile) cameras, out of which only seven are of professional quality. Most cameras have TV District Tuzla (8). The least cameras have TV Konjic and TV Maglaj (2). All TV stations together have 57 VCRs (mainly studio ones). Studio-control rooms are made in the first place for news and talk-show programs. Only five studios are professionally established. Three stations have two studios (TV

studio Kakanj, TV Tuzla and TV Visoko). Total production equipment does not suffice for bigger, and more complex program-production projects. NTV Studio 99 did not give the information.

Video and audio lines have six TV stations. Radio relay and cable links have only TV Studio FS-3 Tuzla. TV Mostar is the only TV station that has a pair of fixed links for direct broadcasts. The supply with PC computers is symbolic, and is not enough for computerized business, and especially not for the use in program (computer processing of picture and sound). Graphic design is only part of future plans in the most developed TV stations. Maintenance departments have all stations, except TV Studio FS-3 Tuzla, and TV Kakanj. (They use maintenance services from outside.) All stations have emergency electric power supply. The only exception is TV Studio FS-3. TV Hayat and TV Mostar have own generator. Electric supply is not important problem for most of the stations, that work on free territory of central and north east Bosnia.

Transmission equipment is of better quality, than production equipment. The explanation for that one can find in the fact that half of the stations use transmitting equipment of RTV B&H, or that the equipment was bought during the war from donations. The transmission equipment is mainly of Italian production, and has correct technical possibilities, but will not last long. Six out of twelve stations think their signal is satisfactory. Three think it is unequal. Two stations cover partially the area of the canton (TV District Tuzla and TV Hayat), five cover completely the local commune area (four partially); while four stations cover completely the urban part of the town.

Regarding the field of the coverage, the greatest audience have TV District Tuzla and TV Hayat. Most of the stations use rented working space.

5.2.3. Elements of independence - autonomy

More reliable estimates on the extent to which TV stations are independent and autonomous in their work can be drawn only on the basis of an analysis of their program's contents. This research deals only with the analysis of some quantitative elements which enable the conclusions to be drawn, primarily indirectly. The fact that more than half the number of stations in their official title bear the attribute "independent" can in no way be determinative when evaluating the degree of their independence. Sometimes, it speaks more of their intentions, rather than a real position in real circumstances.

The complexity of ownership relations and organizational structure of stations is expressed in a legally very complex and inconsequentially defined position, in which the rights and duties of the public and commercial stations are not clearly recognized.

Seven observed stations have public (local, cantonal) character, and their founders are usually the assembly of a municipality, or public enterprises (houses of culture, national universities). TV Mostar is the only public station under combined ownership, while the position of TV Lukavac, in the ownership and status sense, is undefined. Five of the twelve analyzed stations have private-commercial character, partially within the private ownership, and partially within the combined ownership. Nominally, there are no political parties or religious institutions listed among the founders. In the current situation, there is no reliable basis to draw a firm conclusion on the attitude of some categories of owners towards the editorial policy, i. e. the degree of program autonomy. In five of these stations, the key subject of the editorial policy is the station's owner, and in as many cases, it is the editor in chief; and in the case of TV Hayat, it is the director. As for TV Tuzla, based on the discussions with their management staff, the creation of the editorial policy is exclusively entrusted with the professional program staff, while with TV Mostar,

according to the same source, the most prominent is the influence by the owner and management structures. Governing Boards and Program Councils have secondary importance (the exception being TV Visoko) in the program profile. The decision making regarding the operative editorial matters is mostly in the hands of the editor in chief, and then, editorial boards and director. Private stations usually utilize their own frequencies and receivers of the RTV BH.

In the circumstances of the communication blockade and war, a number and structure of the sources of information had decreased. When using sources, frequently there is no firmed up program attitude, rather the solutions are being searched for within the framework of the existing circumstances. However, it can be stated that public stations rely, to a large extent, on the sources closely connected with the official state organs, i. e. national agency and RTV BH as a primary source of information. In the interpretation of controversial events, it is a more frequent case that private stations would choose to combine a few available sources, rather than is the case with the public stations. According to the statements by the responsible managers in three observed stations (TV Konjic, TV Hayat, TV Studio Kakanj), journalistic license is reflected simultaneously in the right to both choose the topic, and to present his or her own author's attitude, while in other stations, this right is being realized only in one of these two forms. However, a complete evaluation of the quality of author's freedom is possible only through an analysis of the program contents.

All of the analyzed stations show extremely high degree of openness towards programs of foreign productions. Here, it is necessary to bear in mind that the openness is often the only way for a program to survive, in the situation of its own relatively small and uniform production. All the stations, except for TV Studio FS-3 Tuzla and TV Konjic take over programs of other domestic stations, primarily main informative programs of the RTV BH. Only TV Tuzla produces programs in a foreign language (English). Music programs, from all the parts of the former Yugoslavia is broadcast only by the TV Studio FS-3 Tuzla.

Almost all of the stations transmit religious programs (the exception being TV Konjic and TV Studio FS-3 Tuzla). Majority of them broadcast programs of all confessional groups, while TV Studio Kakanj and TV Maglaj broadcast programs belonging only to one confessional group. (TV Hayat has 95 % of one confession program).

Three of the observed stations - TV Studio FS-3 Tuzla, TV Konjic, and TV Tuzla - use within their programs the language of author's choice, while other analyzed stations use Bosnian language. Only TV Tuzla and TV Lukavac have editorial teams which

employ journalists of all three nationalities, while three of the stations - TV Hayat, TV Visoko, and TV Maglaj, have mono-national editorial teams. Studio 99 has not submitted these data. These data have to be viewed in the context of the national composition of the population in certain area in the warring circumstances.

With the situation of unresolved economic status of most stations, only conditionally can we talk of the degree of their economic independence. One of the possible parameters is their own commercial profit, which, percentage wise, is the largest with TV Tuzla, TV Zetel, and TV Visoko. Governmental funds were used only by five of the stations, and to the largest extent by TV Lukavac and TV of the region of Tuzla. TV Hayat and TV Studio Kakanj benefited from significant owners' funds.

5.2.5. Economic situation

In the warring circumstances it is not possible to speak of the economic parameters of stations' business. Because of this, many business elements dated 1995 should be considered absolutely as conditional. Only two of the observed stations - TV Hayat and TV of the Tuzla region made positive business result last year; four of the stations functioned on the borderline of profitability, while three of the stations ended with negative business balance.

Despite the lack of economic activity and media market, profit from commercials represented a dynamic source of income. All of the stations have drawn certain income from commercials, while with TV Tuzla (90%), TV Zetel (80%), and TV Visoko (60%) this income is very high. If we consider as a part of commercial business, services to a third party, then, it can be concluded that TV Zetel is the only station which supports itself solely on the commercial basis. Government sources were used by five of the public stations, while only in the case of TV Lukavac it was a primary source of income (90%). TV Hayat and TV Studio Kakanj benefited from the significant owners' sources - 60% and 30% respectively. Domestic and foreign donations were an important source for Studio Kakanj (60%) and TV Maglaj (50%). Three of the stations used foreign donations in the amounts which did not total over one fourth of the total income.

In the expense structure, the dominant position with all of the stations is taken by the expenses for the purchase of equipment, reproduction material and spare parts. Other

category of expenses includes maintenance expenses and salaries, and somewhat on a lower scale, is electric energy, postal services and leasing of space. Only two of the observed stations paid regular salaries and among these are not stations with positive business result. The lowest expense items are expenses for the purchase of programs and author's rights.

This is only a confirmation of the premise that certain obligations are met only selectively and as a token, which is exacerbated by the lack of legal regulations in the domain of author's rights and by the legalization of an opportunity of pirate use of satellite stations programs. Each of the stations have had certain investments, which usually represented a combination of personal investment, investment by the founders and investment on the basis of donations. Higher personal investments is noted with the commercially profiled stations.

Research has shown that reproduction capability of the stations is minute, and that in the future, it will depend more on the establishment of media market, as well as on the plans and possibilities of the owner - founder, and less on the donations, which are an unstable source of income susceptible to various influences.

5.2.6. Conclusion

The creation of the local TV stations in Bosnia and Herzegovina has a short history and coincides with the process of democratization and political pluralism. All the stations were found in the eve of, or in the course of the war, and their constitution (it can not be spoken of a transformation, as is the case with radio) has been halted half way.

The reasons for this are, on one hand, in the warring circumstances, which affect each of the life and social directions, and on the other, in the lack of relevant legal and wider social framework as a basis for a profile making of the radio diffusion system on the whole.

The adoption of the law regulations in the field of frequencies and author's rights are only the first and necessary step in this direction. It has to be followed by the establishment of adequate mechanisms of the social control, particularly, in those segments which can be of international implications. The cessation of the present

tendencies of spontaneity and lack of planning will enable the creation of a situation which will place all subjects in an equal market relation, and thus, stimulate competition and independent character of the media. In this context, there is an issue of the redefining of the RTV BH position which should replace its former position of monopoly by a new position of a generator of development, and of an equal member of international organizations, with all the rights and obligations which stem out of such position. In close connection with this issues is the question of organization of the public television in the future cantonal units.

In the entangled web of property relations, it is difficult to discern the motives for the founding of stations. In this moment, we can offer several answers, which are mutually interwoven: the attempts to overcome the communication blockade, patriotic reasons for the purpose of strengthening the defense capacities of the country, national and religious affirmation, promotion of political interest, estimates that a war investment can be reevaluated commercially in time of peace. Most often, these motives are mixed, and only in the peaceful conditions (market, competition) will this situation be crystallized. In the further process, we can expect the constitution of the system of public and commercial television which will not be separated by some sort of puritan limits. If some world experiences are accepted, the character of property will not in this case necessarily determine the character of a station.

The quality (structure) of the program offer of stations is a result of small production and technology capacities as well as staff and material strength of TV stations. The production of its own program in the current circumstances is so modest that it is difficult to speak of the existence of one's own program identity.

This kind of openness can rather be viewed as a sort of dependence. The real program profiling of the stations is possible only in the conditions of peace. Current staff base is extremely narrow and undeveloped and it is likely that it will, in a foreseeable future, become the greatest limit to media development.

The future is in the building of a comprehensive system of training and staff education in cooperation with the institutions of high education. The ability to invest in the staff will legitimize the position of each station. On a longer term, the goal is creation of the market of media staff.

Technical equipment of stations is at an extremely low level. The basic equipment includes semi professional and amateur equipment, with a mix of standards and manufacturers. The current technical basis does not enable significant expansion with respect to the structural improvement and development of one's own program. The

adoption of new technology and transfer to more modern and functional technical standards will demand primarily radical changes of the existing technical infrastructure.

In the current conditions, when majority of the stations are running “war bookkeeping” and do business in a humanitarian mode, it is difficult to speak of the existence of a firm connection between the real economic position and the degree of independence in their program functioning.

The economic position of the stations is featured by the state of general temporariness. Non existence of the media market in the conditions of war surroundings makes every estimate with respect to the prospects of work of the existing stations and the establishment of new ones rather unreliable. The scale of values has been changed and the structure of the income sources and expenses is essentially distorted. Some expenses are met selectively or are not even indicated in the system of business functioning (legal and economic barriers of the satellite program borrowing are not resolved). The motive called “profit” can barely be discerned in the fact that income from commercials and services is most widely spread form with all the stations, because of the fact that they are, realistically speaking, financially small amounts. In the future, the sources of income will depend more and more on the quality of the programming offer, the zone of coverage and the total commercial capabilities of a station, in the situation of the wake of the media market, to which they themselves should contribute.

5.3. THE ANALYSIS OF THE PRESS - NEWSPAPERS AND MAGAZINES

In the territory of the Republic/Federation under the control of the Army of Bosnia and Herzegovina, in the centers such as Sarajevo, Tuzla, Zenica and Mostar, and in some of their neighboring municipalities, the total of 81 publications have been included in this poll taking. This should be borne in mind, because even in these regions, and in particular, in their surrounding municipalities, there are many more papers being published - primarily of informative and political nature. Some of them, such as the revue "Dani", and a weekly "Hrvatska Rije~" did not agree to participate in this poll. Therefore, in the ID card of each media, we have entered only their basic data.

The majority of these periodicals were initiated in the course of war. Since the prewar times, actually, since before the multi party elections, there are only 12

publications still in existence. Immediately prior to the outbreak of aggression, 5 publications were initiated. Among the analyzed papers, there are two daily papers, 7 weekly papers, one 10 day paper, eleven biweeklies, 31 monthly papers and 29 occasional papers. 28 publications declared themselves universal, 9 as exclusively political, 10 as cultural, 18 as educational, 10 as fun and sports, and 3 without this designation. These designations should be taken as conditional, i. e. , as a predominant program orientation, since almost all of these papers cherish even those theme domains for which they did not register as such. A review of their contents, i.e. in the structure of the contents according to their domains and genres, we shall slightly correct the picture of the program direction. In this analysis, we will group together “political” and “universal” ones, excluding only the three papers which belong to other groups. We will group together sports, fun, culture and education papers (in which the contents on culture is predominant), and we shall enter a term of - “other publications.”

Majority of these publications is directed towards the so called “universal” audience - 52; towards children - 10; towards intellectuals - 5; Bosniacs - 6; business people - 5, etc. There are 5 Bosniac publications (by declaration), while all others count on readers among all the nationalities. However, this should be taken with a reservation, since among those which are otherwise declared, there are directions towards one nationality only.

An interesting matter is the issue of the founders. The State appears as founder only in three cases, political parties in four, various enterprises in 30, associations in 25, a physical subject in 7, etc. However, the state as represented in the municipalities, is a founder of some publications, though they did not declare themselves as such. An example is of “Maglajske Novine”. Some papers which had been published between the Second World War and the aggression, and whose founder was the state, are now transformed (“Front Slobode”) or have not yet completed the process of transformation (“Oslobodjenje”) as regards the ownership. Only three publications declared themselves as religious. However, among those whose founders are associations of citizens, there are some religious ones (“Mualim”).

The technical equipment (computers, etc.) is better than could be expected in the war circumstances. A large number of papers have at their disposal PC computer equipment, and among these are those who have 3 and more computers.

Laser printers are in the possession of 13 editorial teams, and scanners only with 7 editorial teams. A review of the tables on the equipment availability show that papers such as “Oslobodjenje”, “Biznis magazin”, “Futura magazin”, “Sezam”, “Tuzla list”, “Ve~ernje novine”, “Bo{nja~ki avaz”, “ABC zabavnik”, “@ena 21”, and “Coridor” are

satisfactorily equipped. The preparation and printing is in the largest number of cases done by other organizations.

The circulation, from the commercial point of view, is small, and inadequate in terms of cost covering. But, in view of the narrow market, abundant offer, and weak purchase power of the population, it is difficult to expect that it could be significantly better. Therefore, 25 publications do business with negative balance, 32 are on the borderline of profitability. Majority of these borderline cases are financed by the owner or a donor, who cover only the effective expenses. The expenses of printing are primarily dominant. The next on the list is paper cost. The employees of 23 publications receive regular salaries, and of 29 publications, only occasionally. Others did not state this information. Some sort of and some degree of investment can be indicated with 53 publications. 35 are being supplied with the electric energy on the priority basis, and 38 from their own sources. Others did not state this information. Almost every owner and editorial team express their desire for development. However, realistically speaking, only some, actually, only those whose owners ensure stable financing have the interest to develop them further. Generally speaking, the prospects are very limited.

The forms of organization should draw special attention. Of the total number of subject covered by this poll, 55 or 67% are within the framework of other legal subject, i. e. owner, which, on one hand, is the evidence of rational organization, and on the other, the evidence of the temporariness of their existence. Only three organizations function as public enterprise, 10 as share holder companies, 10 as companies with limited responsibility, and, as a company of one subject - 5 editors.

The alphabet and language of print have specific meaning. 75 or 91% of publications is printed in Latin alphabet, 3 publications in both alphabets (Latin and Cyrillic), and two use the latter alphabet. 37 publications are printed in Bosnian language, 5 in Croatian, 22 according to the author's preferred choice, while 18 editorial teams allow the freedom of choice to authors.

The staff picture is very indicative. Of the total of 229 journalists hired in 81 observed papers, only 39 have no university degree. 71 have a degree in journalism. "Oslobodjenje" and "Vešernje novosti" hire 108 journalists, while all the others together hire 121, a breakdown of which means that per one paper there comes 1,5 professional journalists. Among 52 engineers and technicians, 18 are with "Oslobodjenje" and "Vešernje novosti". The training of the journalist staff is almost non-existent. Majority of the editorial team state that the training is carried out on the job, which equals the saying "throw him into the water to swim or drown". Others did not even respond to this question.

Only 28 editorial teams state the lack of journalist staff of various profile. This indicates that a large number of publications is being edited on the so called “associate (contributor)” basis, and that their editors have no intention to develop their own staff base, but that they are counting on a fairly narrow free media market.

The national structure of journalists in the polled publications is as follows: 155 Bosniacs, 35 Croats, 35 Serbs, and 15 of “other” nationality. With 65 of these publications, the editor in chief is Bosniac.

The Analysis of Some Groups Publications Covered by this Poll

In order that this analysis be as useful as possible, we will review separately certain groups of papers and magazines included in this poll: informative- political, cultural-educational, children’s, sports and fun, women’s, and others. Each of these groups will be analyzed with reliance, primarily, on the following indicators:

- social - legal status
- professional standard
- degree of independence - autonomy and
- socio-economic situation

In the analysis, we will use the data available through this poll, conclusions which are drawn for every particular publications, and, to a certain extent, our own observations. The drawing of more comprehensive conclusion can be carried out by means of analysis of their contents and the research of the readers acceptance.

5.3.1. Informative - political publications

Informative - political publications are not only those which have declared themselves as such, but also, those who are “universal” by declaration, but have nevertheless predominantly political contents. Our poll has registered 35 such publications. Since there are significant differences among them with respect to professional standards, editorial conceptions, and particularly, importance for the media life in the Republic, we will separately analyze those which are leading in regards to the

previously mentioned criteria. These are “Oslobodjenje”, “Ve~ernje novosti”, “Oslobodjenje- Ljubljana”, “Ljiljan”, “Bo{nja~ki avaz”, “Bosna est”, “Zmaj od Bosne”, “Front Slobode,” “Na{a rije~”, “Hrvatska rije~” (did not participate in the poll), “Tuzla-list”, “BiH Dani” (did not participate in the poll), “Mostarsko jutro”, and “Republika”. We can add to these “ Narodne Novine”, “Istina of Bosni” , “Sarajevo Times”, “Styl”, but since they have ceased to publish, we will not include them in this analysis. “Mostarsko jutro” was for a long period of time the only paper in the region of Mostar and Herzegovinian municipalities under the control of the Army of Bosnia and Herzegovina, thus, though it has no characteristics of the papers in this group, it has a significant influence in this territory.

Social - legal status

All of these papers are properly registered with the Ministry of Education, Science, Culture, Information and Sport, or with relevant cantonal organs. Their founders- owners are varying. Among them, there is not a single one whose founder is the state, and only two of these, “Republika” and “Zmaj od Bosne” have been founded by political parties. Enterprises are founders of eight among these papers: “Bosna -est”, “ Front Slobode”, “Ljiljan”, “Mostarsko jutro”, “Na{a rije~”, “Oslobodjenje” and “Oslobodjenje” - Ljubljana, “Ve~ernje novine”. “Bo{nja~ki avaz” and “Tuzla list” were founded by physical subjects.

“Oslobodjenje”, “Bo{nja~ki Avaz”, “Front Slobode”, “Ljiljan”, “Na{a Rije~”, “Zmaj od Bosne” and “Ve~ernje novine” have the status of a legal subject. Others are within the framework of some other legal subject. “Bosna-est”, “Bo{nja~ki avaz”, “Ljiljan”, “Republika” are in private property; all others are in combined property. “Oslobodjenje” has not completed as yet the ownership transformation.

“Na{a rije~” and “Ve~ernje novine” are share holders companies, while “Bo{nja~ki avaz”, “Ljiljan”, “Oslobodjenje” and “Oslobodjenje “ - Ljubljana are companies with limited responsibility. “Republika” and “Tuzla list” are companies of one person.

Others do not have a clear legal definition.

Professional Standard

These 15 papers, considering the circumstances, are professionally well built. All of them, except for “Republika” have organized editorial teams - professionally or semi professionally, technical services-8, management-9, and file documentation -11.

All of these papers are essentially informative political, notwithstanding variations in the formulation of their program orientation. Majority of them possess the determinative "independent". Only "Ljiljan" has declared itself a national paper, while "Mostarsko jutro" - as a paper of "the democratic public". The determinative "independent" has to be viewed in a wider context. None of them is founded by the state nor is the state their owner, the state does not appoint their responsible functionaries, and it does not provide finances for them. Occasional, single term help is not financing. However, some of them are connected with parties' leaderships, so that those parties have influence over the editorial policy, selection and appointments: "Ljiljan", "Zmaj od Bosne", "Hrvatska rije~", "Republika"... Editorial teams of these papers also, are more or less, autonomous in the realization of the editorial policy, therefore, this aspect should be viewed with each team separately (see the conclusions).

Papers in this group have a developed network of associates in the issuing place, as well as correspondents within the country, and some abroad. Most developed in this sense are those which are published in Sarajevo. In connection with this, it should be emphasized that these associates are mostly amateurs - literary writers, politicians and other public officials.

Similar case is with the issue of correspondents. However, due to the editorial team work, texts which are published, including those by associates, as can be concluded by a quick glance over, are satisfactory, from the professional point of view.

The sources of information, as well, speak for the professional standard. Majority of them cover events directly; "Front slobode", "Ljiljan", "Ve~ernje novine" use solely domestic agencies. Bulletins of foreign agencies are used by "Oslobodjenje" and "Republika". Weeklies and biweeklies rely on authors, namely, authors' contributions are predominant in their contents, so that other sources of information are less important.

"Oslobodjenje", "Bosna est", "Ljiljan", "Mostarsko jutro", "Republika", "Ve~ernje novine" and "Bo{nja~ki avaz" have overseas correspondents.

Professional standard of these papers can be measured by their organization - distribution of space by various domain of life. Internal politics, for example, take up 20% - 80% of space, economics 5% - 30%, culture 5% - 25%, etc.

It is interesting to note that all of these papers, except for "Oslobodjenje" devote little space to the existential issues of the population : 2% - 10%. In the situation where the elementary existence of the population : food, water, health care and medicaments, energetics, housing, municipal works, is significantly threatened, this question does certainly preoccupy the attention of the public. Truly, economics can be understood as

existential problem, but little attention is being paid to this issue as well. In conclusion, we have to state here that all these papers cover all vital domains of social and human life, ranging from internal politics to sports and fun.

All informative-journalistic genres are being represented in these papers. News, reports and commentaries take up 20% -50% of space, being the most important of genres. In "Oslobodjenje" these genres take up 55%, and in "Bo{nja~ki avaz" 20%. Weeklies and particularly, biweeklies, practice primarily an article and interview. "Tuzla list", for example, gives even up to 60% of space to these genres, "Bo{nja~ki avaz" - 70%. Some papers ("Oslobodjenje") have conquered to a large extent the genre of short and analytic commentary, others ("Bo{nja~ki avaz") are specializing for specific forms of investigative journalism.

These publications are, staff wise, best assembled. The exception is "Republika" and "Tuzla list" which do not employ journalists. According to the number of employed journalists, "Oslobodjenje" is leading with 67, "Ve~ernje novine" - 53, "Bo{nja~ki avaz" and "Ljiljan" -15 each, etc.

"Oslobodjenje" employs 15 degree journalists, "Ve~ernje novine" -19. All others employ not more than 1 - 3 degree journalists. There are 91 Bosniacs working in these editorial teams, 29 Serbs, 25 Croats, and 7 "other" journalists. "Ljiljan" did not provide this information on the national composition of their team. All these papers show the lack of professional staff: journalists, journalists - specialists in certain areas, photo reporters, commercialists.... However, not one of them have organized training - professional training ends up as being the work itself.

An analysis of the contents, which should be carried out, will show to what extent such training is successful. Not even the computer training is at the level of the technical means at their disposal. Only "Bosna est" and "Oslobodjenje"- Ljubljana indicate that their journalists are trained in computer word processing, while others have indicated "only some of the journalists".

Computer equipped teams are "Bosnia est", "Bo{nja~ki avaz", and "Oslobodjenje", while "Ljiljan", "Mostarsko jutro", "Tuzla list", and "Ve~ernje novine" have combined equipment (both classic and computer). Others have classic equipment.

Degree of independence-autonomy

If we judge the dependence or independence according to the founder and his authorities, then, all these papers can be called independent. However, if independence

encompasses a wider idea, then some of those - those whose founders are political parties, are dependent on the policies of the party leadership. Among these are "Zmaj od Bosne", "Hrvatska rije~", and (to a certain extent) "Republika".

The criteria of independence should be coupled by those which indicate the autonomy of the editorial policy, i.e. of the autonomy of the editorial teams in the editing of the publication and, of the freedom of journalist while carrying out his task. The key word in the constitution of the editorial policy and establishment of the policy is with the owner in four cases, with the editor in chief in three cases, the Program Council with two and editorial staff in one case. It is interesting to note that a director as a decisive factor occurs only in one case, and then, on the second place, which indicates that the function of director is mainly managerial.

In six of the papers, the editor in chief is in the second place with respect to decision making on the editorial policy, or third or fourth place in the hierarchy. In the case of operative editorial decisions, the editor in chief is most responsible in six papers, the editorial staff in two; with respect to this, journalists are in the second or third place. The owner and the director do not appear here.

As a criterion of autonomy, naturally, we can include the right and freedom of journalists with respect to the choice of topic, and position taking. "Bosna est", "Bo{nja~ki avaz", "Oslobodjenje", "Oslobodjenje"-Ljubljana, and "Republika" indicate this right in both questions (topic - position), while "Front slobode", "Ljiljan", "Mostarsko jutro", "Na{a rije~", "Ve~ernje novine", "Tuzla list", and "Zmaj od Bosne" only with the position taking.

In the case of different interpretation of events which is indirectly conveyed through a source of information, only "Zmaj od Bosne" relies on the source of information which is the closest to the state organs, while all others attempt to consult many sources. Both criteria - author's right and sources of information, are given on the bases of subjective responses by the poll participants, thus, the analysis of the contents may prove them different.

All these papers are printed in Latin alphabet. The exception being "Tuzla list" which employs Cyrillic alphabet as well. The naming of the language and the use of variant lexeme and style, is, almost with all of the papers, the right of the authors, (outside associates), while employed journalists observe the position of the owner, or publisher. Majority of the poll participants include a very wide lexical basis under the term "Bosnian language".

The national composition of the employees is also a factor of the autonomy, but only to the extent that the editorial teams are open to members of all nationalities when

hiring new members, and independent of the founder's position in regards to this issue, namely, if the basic criterion in this process is the criterion of expertise, experience, etc., which cannot be estimated, since the poll questionnaire did not include indicators for this issue. Responses merely give a general picture, which was the aim of the research, rather than to indicate causes and consequences.

Economic position

Financing is an important factor of independence and autonomy. It has already been stated that none of these papers is within the state budget, or its organs. However, since none of them supports itself by the income from circulation sale, commercial space, and additional services (except for "Oslobodjenje Ljubljana"), all of them are, therefore, dependent on some outer economic source of financing. Seven of these papers are doing their business with negative account, four are on the borderline of profitability, while others did not indicate this information. The negative balance between the production and the sale price - and this is noted with all of the papers except "Oslobodjenje"- Ljubljana, is covered by the owners or donors. These papers do not wish to disclose their donors. Therefore, in the case that we are analyzing, it is difficult to speak of a degree to which these papers are independent from their donors.

The total circulation of these papers is 55. 200 copies. "Bo{nja~ki avaz" did not indicate the circulation figure, while "BH Dani" and "Hrvatska rije~" did not participate in this poll. The total of the sold copies amounts to 36 000. The remainder is being distributed free of charge or is a remittance. The highest circulation figure is with "Oslobodjenje" - Ljubljana - 28 000, but it has the highest remittance - 13 500 copies. The largest part of the circulation is being sold in the place of issue, or in the Republic of Bosnia and Herzegovina. Only "Oslobodjenje" -Ljubljana and "Ljiljan" sell more than 85% of the circulation copies outside R BH, which means, sale for foreign currency. Six of these papers indicate printing as the highest expense, while others indicate paper, plates, and distribution. Distribution is the highest expense for those who sell abroad a large portion of the circulation copies, because the distributors take even up to 56% of the sold circulation. This is the main reason for the cessation of publishing of the paper "Istina o Bosni".

Further investing is indicated with 10 of these papers. Six of those finance those investments through personal funds, 6 through donations, and 2 through donations and personal funds. Others did not specify this information. The employees of only five papers

are paid regular salaries. All of these papers have serious development plans. In particular, "Oslobodjenje", "Ve~ernje novine", "Bo{nja~ki avaz", "Ljiljan", and "Bosna est". Others have ambitions too, but the realistic basis for these ambitions is very unfavorable. All of them wish to increase the circulation, extend the market, increase the frequency of issue, add on, or improve the equipment.

5.3.2. OTHER INFORMATIVE POLITICAL PAPERS

Among 81 analyzed papers, there are additional 19 which can be categorized in the group of informative political papers. Among those are 1 weekly, 3 biweekly, 12 monthly and 3 occasional papers. The State has founded three of those, political parties two, enterprises four, associations seven. Two papers have registered as public enterprises. The other 17 did not indicate the form of organization, since they function within the framework of other legal subject. Since only in five of the cases the founders are the state and political parties, it could be concluded that majority of these papers have an independent status. However this conclusion is made relative by the fact that almost all of them exist within the framework of other legal subject, thus, the view on their independence, from the status point of view, should be formed through the status and the position of the legal subjects within whose framework they operate.

Professional standard

The target groups of these papers are universal. Only four of those are directed toward special groups, such as journalists, for example. 10 of such papers have organized editorial teams, but only in a few cases, it can be spoken of professional editorial teams. 5 have technical services, 6 management, and 4 have file documentation.

These papers, by rule, are arranged on associate basis. Even those who do indicate the existence of an organized editorial team, gather groups of associates around this actually small core group. The composition of permanent associate groups is constantly changing. If we follow and compare "in pressum", it can be noted that same people often participate in the editorial staff of two and even more papers, even those which mutually differ by their political and editorial definition.

The number of hired journalists - only 19, indicates their professional standard. Among those, "Tribina"- war issue, "AS", and "Hrvatski glasnik" hire 12, while all others 6. Among 19 journalists, 10 of them are degree journalists. The lack of staff - degree journalists and experts for computer processing was indicated by 12 papers.

In the total number of the employed, there are 15 Bosniacs, 2 Croats, 1 Serb and 3 others. All of these papers state that they are open, notwithstanding the national background. Based on the "ID" card, and review of some of their issues, it can be seen that there are members of all three nations among the editorial staff organs, and authors. The majority of these papers are circulated in the place of issue, thus, there is no need for correspondents. The truth is, they do specify a number of outside associates, where they include authors as well. "AS", "BiH `urnalist", "News letters", "Drina", "Hrvatski glasnik", "Maglajske novine", "Spektar" and "WHY" have foreign correspondents. The foreign correspondents are usually journalists who have fled Bosnia and Herzegovina, or some refugees with other professional degree.

The distribution of space according to various domains of life indicates that they, with small exceptions, cover all information relevant social issues. The majority gives the largest space to domestic politics - 15% - 53%; domestic politics, economics, and existential issues for the population take up 30 - 60% of the space. Several of those: "AS", "Tribina", "Maglajske novine" give 20% of space to war topics. Among these papers, several give the largest space to culture: "Spektar" - 50%, "News Letters" even up to 60%; "WHY" - 25%; "Hrvatski glasnik"-30%. According to this, they could be classified among culture publications, but they have declared themselves as informative -political papers, probably because they cover the culture informatively.

With respect to the dynamics of issue, these publications, devote relatively large space to news, some even up to 55% - such as "AS". Articles take between 10% and 50%.

Among the observed papers, only "WAY" and "Bilten"- a paper of the Jewish community in Bosnia and Herzegovina, have a foreign language issue.

These papers do not rely on the new information agencies. The main source of information are events themselves, which they cover directly and also, authors' contributions are dominant. The exception is "AS" which uses bulletins of the domestic news agencies.

On the basis of the aforementioned, it can be concluded, though with some reservations, that the professional organization of the majority of these papers is at a low

level, or at the lowest point of satisfactory. In some other circumstances, market circumstances, for instance, this would play a decisive role in terms of their survival.

Degree of Independence - Autonomy

The majority of the poll participating publications have declared themselves as independent. They are such, from the formal point of view, because, the state is not their founder and it has no authority over them. The exception are only those which are founded by the municipalities. However, since the larger number is, status wise, within the framework of other legal subject, the issue of independence can be problematic. Nevertheless, it can be stated that several of those are independent : "AS", "BiH `urnalist", "Blic", "News Letters", "Hrvatski glasnik", "Spektar", "Way". It is more difficult to state this in the case of those whose founders are political parties.

When determining the program conception, on the basis of the data obtained from the analyzed papers, the owner plays a primary role in eight of the cases, the director in three, the editor in chief in five, the editorial staff in two of the papers. Since the owner and the director are usually one and the same person, or, since the owner appoints the director, it means that these two functions have the determinative influence on the constitution of the editorial conception. If we add to this that the editorial staff in two of the cases is in the first place, and in four cases in the second place in the hierarchy, a relatively high degree of autonomy can be stated with the editorial teams of this group of papers.

In favor of this goes the fact that in twelve cases, the editor in chief has the first and the second word, while the editorial staff - in eleven cases in the operational process of the editorial policy.

This group of papers indicates that the authors have the right to chose the topic and the right to form their own position in 9 of the cases, and the right to the topic choice in 5 cases. Four papers have not responded to this inquiry. When establishing the verity of facts, three of the papers rely on the relevant state organs: "Breza", "Drina", and "Maglajske novine". 10 papers rely on the combination of several sources. Others did not indicate this information. The economic independence is an important factor of political independence and editorial autonomy. According to this criterion, only "AS" may be considered independent in this group.

Economic position

The circulations are extremely small. The largest circulation among the analyzed papers is with "Tribina" - the war issue - 5000 copies, some 3000 of which are sold. Others are being distributed free of charge. The smallest circulation is with "New letters" - 300 copies. "AS" prints 5000 copies, and it sells 2650. The largest number of papers within this group have their circulation between 1000 and 3000 copies. Most of the circulation is distributed free of charge. It is interesting to note that despite such situation with the circulation and sale, almost all supply reproduction material from their own funds. Only "WAY" states that it uses the humanitarian organizations donations for these purposes. This practically means that owners and publishers pay for the repro-material. Only two papers state that they have negative business balance: "Narodne novine" and "Spektar"; 7 are on the borderline of profitability. Others did not express themselves on this issue, and actually, they are not familiar with the financial situation of the owner - publisher.

Very indicative are the data on the further investments. Only two papers (among 81 analyzed) state that these investments are done by the owner, four invest from donations, and others do not indicate any investment. This, together with the circulation and business, speaks enough for the economic situation of these papers. Therefore, regular salaries are paid to the employees in only "BiH `urnalist " and "Blic", and four of the papers pay occasionally. Others did not specify this information.

The priority in energy supply is awarded to eight of the papers, seven have their own sources, while others did not respond.

5.3.3. PUBLICATIONS FOR CULTURE AND EDUCATION

According to the basic program directions, i. e. according to the declaration, 28 publication of culture and education orientation are operating in the research area. We will exclude from this figure publications for children, women and business people, which will be the subject of a separate analysis. After this, there remain 17 publications. Those are: "Bosanka vila", "Behar", "BiH {kolski glasnik", "Coridor", "Dijalog", "Eko oko", "Fantom

slobode”, “Krijesnica”, “Mostovi”, “Mualim”, “Odjek”, “Pogledi”, “Preporod”, “Sineast”, “Ste}ak”, “Zora Cankarjeva” and “ZE Coridor”.

Legal status issues

“Bosanka vila”, “Coridor”, “Fantom slobode”, “Ste}ak”, and “ZE Coridor” are oriented towards universal audience; “Behar”, “Mualim”, “Preporod”, “Pogledi” towards Bosniac audience, “Mostovi” and “Zvu~na panorama” towards the disabled, while all others towards intellectuals.

The founders of these papers are: associations -11, enterprises - 2, physical subjects 2, institutions - 1, and religious organizations - 1. As can be seen, among the founders, there is neither the state nor the political parties. “BiH {kolski glasnik “ is within the state property, 5 are in social property, 6 in private, and 3 in combined property. Others did not specify this information. The status of public enterprises is granted to 1, share holders company to 1, company with limited responsibility to 2 papers. Others did not indicate the form of organization, as they are under the framework of other legal subjects.

Professional standard

Only “Coridor” and “Ste}ak” among the observed papers, have organized editorial teams, management, technical services and research; “Odjek” and “Preporod” have only the editorial team and technical services, while “Zvu~na panorama”, “Krijesnica”, “Sineast”, “ZE Coridor”, “Mualim”, and “Dijalog” have only the editorial teams. Others do not indicate any of the forms of professional organization.

This whole group employs ten journalists and that is all in four editorial teams. Others do not have fully employed journalists. Except for “Preporod”, and to a certain extent “Coridor”, they have volunteer editorial teams, or they are edited on associate basis. All the papers in this group indicate the lack of professional staff, however they have no capabilities to hire them. They need specialized professional staff, which is lacking nowadays in Bosnia and Herzegovina. Among the 10 hired journalists, 9 are Bosniacs, and one Serb.

This type of papers, as a rule, has no separate corresponding network. The exception being “Preporod” and “Mualim” who do have correspondents in larger centers in

Bosnia and Herzegovina. Overseas correspondents, i. e. overseas associates are only with “Eko oko”, “Mostovi”, “Preporod” and “Sineast”.

The contents includes culture, science, arts and education. These topics take up 20% - 100% of space. News genre is employed only exceptionally. Articles, interviews, discussions, essays and studies are predominant.

These papers have specific sources of information - the domains of science, culture, education, and art which, by rule, have no organized services for public relations.

Degree of independence - autonomy

There are no papers in this group whose founder is the state or the political parties. If we judge according to this parameter, then it can be stated that they are independent, with a reservation towards those which are legally, within the framework of other legal subjects. The determining criterion here can be influence on the editorial policy. In 5 cases, the dominant influence is exerted by the owners, in 5 the editor in chief, in 3 the editorial staff, etc. Operative editorial decisions are made by the editor in chief in 7 cases, editorial staff in 3, and director in 1. In the cases where editor in chief does not have the first word in decision making process, it has the second. Similar relations are with the control of the realization of the editorial policy. The language of print is by the author's choice in 4 papers, in 6 papers it is Bosniac language and the author's choice language, and in 2 papers it is Croatian. Both alphabets are employed only by “Bosanka vila”. Others use Latin alphabet in print. These data indicate a certain degree of autonomy of the editorial policy.

Economic position

Negative business result in 1995 is indicated with “Bosanka vila”, “Pogledi”, and “Preporod”. 8 papers in this group indicate that they are functioning on the borderline of profitability. Others did not indicate this information. As in the previous group, those borderline cases and those who did not specify this information, function within the framework of other legal subjects. The circulation of these papers differ greatly, starting from 350 copies (“Sineast”) up to 15 000 copies (“Coridor”). Of the total of 50 650 copies of circulation of the observed publications, 6500 is sold. The remainder is distributed free

of charge or is the remittance. "Coridor", for example, distributes all of its circulation free of charge. "Preporod" sells 1000 copies of the total of 7000. "Mualim" also distributes free of charge all of its 5000 copies of circulation, etc. These data are very telling.

Eight of these papers supply the reproduction material from their own sources, 5 from the humanitarian donations, while others did not specify this information. Under "own supplies" we include owner's funds, or funds of the legal subjects within whose framework it functions. Nine of the papers did indicate investing. It is usually financed through donations, founder's funds or personal funds. Only "Mualim" and "Preporod" pay regular salaries to their employees, others occasionally, or not at all.

Instead of a firm conclusion, it can be stated only that the economic situation of these papers is dependent on the abilities of founders and owners and that it has few prospects. On the basis of this, it is difficult to state anything on the possibilities of future development, though all of them indicate significant desires to this effect.

5.3.5. CHILDREN'S PAPERS

It is interesting to note that in R BiH, in the areas of research, there is a large number of children's papers more than ever before. We have registered 11 of those. Those are: "Bistro oko", "[ubi dubi", "Upko", "Dar", "Kevser", "Lastavica", "Porodica i dijete", "Vesela sveska", "Zabavno oko", "ABC Zabavnik", and "Male novine". There are seven monthly papers in this group. Others are published from time to time, when the circumstances permit. Enterprises are founders of 5 of these papers, associations of two, humanitarian organizations three and religious organizations - one of the papers. Social ownership is registered with three papers, private with five, and combined property with one. Others did not indicate the property position. All of them are within the framework of legal subjects. "Vesela sveska" is a share holders company, "ABC" and "Kevser" are companies with limited responsibility. Others did not indicate the form of organization.

Professional standard

All of these papers state that they have organized editorial teams. Other services are non-existent. The fact that there are only 9 journalists in all the 11 papers speaks for the type of editorial teams. They are mainly organizers and animators, while the editorial teams consist of associates and volunteers, primarily educators, psychologists and doctors. There are 7 Bosniac journalists, and 1 Croat and 1 Serb.

Culture dominates the contents up to 95%, coupled with education through fun. Some of these papers fill up their space by children's contributions - poems, short stories and drawings ("[ubi -Dubi", "Kevser"). In any case, in all of the papers, children play an important role as associates.

Degree of independence - autonomy

If we exclude those which are founded by religious organizations, all of these papers are very open. They are intended for all children notwithstanding their national and religious allegiance. Some of them give religious instruction, but for all four monotheistic religions. Editorial teams, or editors are fairly autonomous in their work.

Economic position

Sale of the circulation is not a source of existence for this group either. Truly, the circulation is somewhat larger than in the previous groups. The total print circulation is 55 300 copies, while sold circulation amounts to some 7000 copies. The rest is distributed free of charge or is the remittance. "Vesela sveska" has the largest circulation and it is distributed free of charge in full. "Porodica i dijete" have the smallest circulation. Only one editorial team indicated negative business balance - "Porodica i dijete", five are on the borderline of profitability, which means that their owner or donor covers for the effective expenses. Others did not state this information.

The largest portion of the circulation of all the papers is distributed in the place of issue, and only a small portion in other free territories. The circulation distributed abroad is insignificant. The printing expenses and paper cost are predominant. These are most likely those expenses that owners and editorial teams are accounted for separately, while all the rest is within the framework of the other legal subject calculation.

Only four papers "ABC", "Bistro oko", "[ubi Dubi" and "Dar" have expressed some form of investment. It is mostly the case of equipment supply for the processing. Economic position of this group of papers, if judged from the rational point of view, is not favorable.

Therefore, it is difficult to speak of their prospects, or of their survival, if and when non commercial sources of financing cease.

5.3.6.SPORTS AND FUN PAPER

In this group, ten publications are analyzed. Sports papers are “BiH sport”, a magazine “News letters”, “FIS Sarajevski sportski list”, “Revija King”, “Sport u teoriji i praksi”, “Trijumf”. “Enigmatski magazin”, “Sezam”, “Video mix”, and “Vozdra” are fun magazines. They are all oriented towards the so called universal public. There are no dailies, weeklies, or biweeklies. Four of them are published monthly: “New letters”, “Revija King”, “Sezam” and “Vozdra”. Others are issued from time to time. However, their real dynamics is below the plan. In 1995, some had only one issue.

Founders of these papers are enterprises in 5 cases, associations - 4, and physical subject - 1. Thus, neither the state, nor the political parties occur as founders. Neither of these papers has the status of a legal subject. Three are in social property, three are in private, and others are in combined property. Neither of these papers has a defined legal organization.

Professional standard

Only 2 of the observed papers within this group have organized editorial teams, technical services and management: “Sezam”, and “Vozdra”. Against this, six of these papers state that the editorial policy is defined through the editorial team, three on associate basis, and one individually. (“Video mix”). All of this can be taken with reservations, since their “logistics” belongs to the owners and founders, and in principle it is not intended for papers. All ten papers in this group employ only four journalists, none of them with a degree in journalism. All of them indicate the need for professional staff, in particular for the specialized journalists for the papers of this sort. Primary influence on the editorial policy is exerted by the owners in four cases, by the editors in chief in three, and by the editorial staff in three. . If we add to this that editors in chief participate in the decision making process on a second place in five papers, we can conclude that these

papers are fairly autonomous in their editing. The distribution of space by the domains corresponds to the profile and editorial conception. Sports takes up to 50% - 90% in sports papers, fun 30% - 60% in fun papers. Fun papers devote a significant portion of space to culture, which they treat in a popular, amusing way.

Economic position

The circulation of these papers is a token value. The exception is only "Sezam" 5000, and "Enigmatski magazin" 3000 copies. The total circulation figure of this group is 16 700 copies, while 9200 is sold. This is the highest sale figure among all of the observed papers and revues, excluding the daily press. The circulation is usually distributed in the place of issue. Negative business balance is indicated by four papers. Others are on the borderline of profitability. The dominant expenses are expenses for paper and printing. "Video mix" and "Vozdra" pay regular salaries to their employees, There can be almost no discussion of any development plans.

5. 3. 6. WOMEN'S MAGAZINES - WOMEN'S PRESS

In the territory of Bosnia and Herzegovina which we covered in this research, three women's magazines are analyzed, all three in Sarajevo. These are "Sumeja" - whose owner is the Association of Muslim Women", "UNA" - whose owner is NIP Revue Press Sarajevo, and "@ena 21" - whose owner is a women's humanitarian organization "@ena 21". "UNA" is prepared in Split, and published in Germany, and it does not appear in Sarajevo. "UNA" is a weekly, while others are monthly revues. "UNA" is in combined property, while others are in social property. Neither of them has the status of a legal subject.

Professional standard

It is interesting that these revues have developed editorial business structure: editorial teams, technical services, management. Editors in chief primarily influence their editorial policy, which means that the editorial position is professionally autonomous. They employ the total of 5 journalist: "UNA" three and "Sumeja" one. "UNA"'s journalists are one Croat and three others. The alphabet employed is Latin, while "Sumeja" and "Žena 21" call the language Bosnian. All three revue allow the author to freely employ the variants.

"Sumeja" grants 50% of space to the issues of culture (Bosniac and Islamic), and 30% to religious issues, "UNA" 30% each to culture and fun, while "Žena 21" devotes 60% to existential issues of women and 30% to culture.

"UNA" and "Žena 21" is open for cooperation for all, notwithstanding the religious, national and political allegiance, while "Sumeja" is open to Bosniac women, notwithstanding their political orientation.

Economic position

The circulation of these revues is relatively high: "UNA" - 18 000, "Žena 21" 5000, and "Sumeja" - 3000 copies. "UNA" sells 8000 copies, "Sumeja" - 3000, while "Žena 21" is distributed free of charge. Taking into account the expensive equipment, fine paper and a large number of photographs and multicoloredness, the sold circulation cannot cover the expenses of production, even if it was to increase. All three revues function on the borderline of profitability, which means that they are financed by the founder or owner. Major expenses are those of paper, print and distribution. "UNA" and "Sumeja" pay their employees regularly. "UNA" is striving to achieve its prewar reputation of a revue for women, of the European rank, and high circulation (almost 300 000), but this will be possible only after the war. Other two revues have serious ambitions, but their realization depends on the abilities of the owners. And those are limited, even with the help of humanitarian organizations.

5.3.7. OTHER PUBLIC PAPERS

There are 11 papers outside the usual classification, in the observed area. Because of huge differences in their conception, orientation, editing, they are difficult to analyze lumped together. Therefore, we will separate business publications, which are: "Biznis magazin", "Futura magazin", "ZIPS", and "GAS". Their function is important, and therefore, they deserve special attention.

"Biznis magazin" and "Futura magazin" are two complementary magazines. "Futura" is intended for abroad and is published in English language. "GAS" is an expert magazine of the gas industry in Bosnia and Herzegovina. It is published also in English language as well. Their target groups are business people in the country and abroad.

"Biznis" and "Futura" have joint editorial team consisting of three journalists, while "GAS" does not employ journalists. Contributors are experts from the domain of economy, banking, management and marketing.

"Biznis" is a monthly magazine, while "GAS" and "Futura" are published from time to time. All three papers are maximally open for cooperation with everybody who is capable and desires cooperation. They are independent.

"ZIPS" is also a paper for the business people. It is a biweekly. The owner and publisher is NIP "Privredna [TAMPA", share holders company, within whose framework "ZIPS" is functioning. "Futura" is a legal subject, while "Biznis" is in its framework. "Biznis" or "Futura" and "ZIPS" have organized editorial teams, technical and management services, while "Biznis" has the research service as well. Editors in chief have an important influence with the editorial conception, which speaks for the professional autonomy. 60% - 90% of space is occupied by the economic issues, banking and industry issues, while commercials take up to 25%.

The circulation is as follows: "Business" - 5000 copies, all of which is distributed free of charge; "ZIPS" - 1000 copies, and 750 are being sold. "Futura" did not indicate its circulation figure. "Biznis" distributes 60% of its circulation in Bosnia and Herzegovina, while the rest goes to Slovenia and Croatia. All of the circulation of "ZIPS" is being sold in Bosnia and Herzegovina. "ZIPS" completed the 1995 business year with a negative

balance , “Biznis” on the borderline of profitability, “Futura” did not indicate this information. The largest expense is printing, which is understandable, due to the high quality of print, in particular that of “Biznis magazine”. With regard to the ambitions of the publishers and their goals, which are manifested in enviable equipment, it can be surmised that they seriously count on development.

5.3.7. . PAPERS FOR THE CONSUMERS

There are two such papers: “Oglasi” - a weekly, “SARP” - a biweekly (currently it experiences delay). Both are oriented towards citizens - consumers. SARP covers the existential issues of Sarajevo citizens, while “Oglasi” plays an intermediary role in sale and purchase, for which there is a great interest. The founder and owner of “Oglasi” is GIK “OKO” Sarajevo, while The Association of Sarajevo consumers owns “SARP”. The circulation of “Oglasi” is 2000, 1800 copy is sold, whereas “SARP”’s circulation is 5000 which are all distributed free of charge. SARP is organized on a volunteer basis, while “Oglasi” has organized all editorial functions. “Oglasi” employs one journalist. Both papers devote 65% of space to so called existential questions of citizens. Both of them function on the borderline of profitability.

5.3.7.1. Special purposes papers

There are several papers in R BH which are for special purposes. The following are analyzed: “Novice” - paper for citizens of Slovene origin in BH; “Zora Cankarjeva” - intended for Slovenes and intellectuals of all nationalities; “Prijatelj” - a paper for humanity, impartiality, neutrality and independence.

The initiator and owner of “Novice” is the Federation of Slovenes in BH, “Zora Cankarjeva” is initiated by the cultural society of Slovenes “Cankar”, “Prijatelj” - by The Red Cross of Sarajevo. Among these are also the following papers: ZE magazine - cultural informative edition “Na{a rije~” from Zenica, and “ZA” former “ZADRUGAR”, now

somewhat differently profiled - a paper for the fight against hunger and poverty. This paper has a very important educative role as well.

Among these papers, the state does not appear as their founder. Founders are various enterprises, associations and societies. These papers promote human rights issues, openness and cooperation among people. "ZA" assists people in making the ends meet by offering expert advice in agriculture, in particular "small farms".

"Novice" distributes their 600 copies free of charge, while "Zora Cankarjeva" sells 980 copies of 1200 circulation copies. "Prijatelj" prints 2000 copies and distributes them free of charge. "ZA" sells 1000 copies of the 1500 circulation copies. "ZA" functions with a negative business balance, "Zora" on the borderline of profitability", while others did not express themselves on this issue. The major expense is printing, then paper and maintenance.

"Prijatelj" devotes 60% of space to internal politics, economics and existential questions, but it has a special approach to these issues. "Novice" and "Zora" grant most of their space to culture.

Conclusion

The media situation in the so called printed press is characterized by diversity, large number of enterprises and the "short breath" atmosphere.

The major pipe line of BH press includes 13 daily, weekly, biweekly and monthly papers ("Oslobodjenje", "Ve~ernje novine", "Oslobodjenje Ljubljana", "Bo{nja~ki avaz", "Bosna Est", "Zmaj od Bosne", "Front Slobode", "Na{a rije~", "Hrvatska rije~" (did not participate in this poll), "Tuzla list", "Dani" (did not participate in this poll), "Ljiljan", "Republika", and "Mostarsko jutro"). They have (except for "Mostarsko jutro") stabilized their dynamics of issue, built more or less recognizable profile, created their own professional staff basis, and a stable network of contributors and have ensured a certain level of technical - technological equipment standard.

With few exceptions, these papers do not belong in the category of high media design. They are all of predominantly informative political character. They form the so called media picture and exert effective influence on the public. Among these are papers with long tradition and authentic forms of investigative journalism. Almost all of them have

a very wide circle of authors, though with the nationally oriented papers, the choice is most often limited to national corps.

The total media picture is fairly pluralist. The trends are informative political, cultural-educative, religious and children's papers. This indicates that the social factors or individuals see the biggest chance for the exertion of influence over the public in this type of papers in particular. It is interesting that in the most difficult warring circumstances, papers in special interest areas were initiated (sports, fun, music). Majority of them did not manage to maintain itself in the continuity on the market, but this is a proof that in relatively stable conditions, the diversity of press called for by the needs of the readers and the initiative of the owners will have its full expression.

At the professional level, there is a total confusion: lack of coordination between the dynamics of publishing and the contents structure and timeliness, lack of familiarity with the target group, "flouting" editorial approach, deviation from the usual genres and editorial standards, non observance of the dynamics of issuing. Partially, this is a consequence of the war circumstances, but also a very low level of professionalism, or the knowledge of the ways media organizations are run.

The technical base of almost all of the papers is very poor and only on the threshold of modern forms of print preparation. With several exception, this preparation is in the hands of the computer firms' owners, which are of "jack of all trade" types, without media specialization. Large graphical capacities, are inherently monopolistic. This disharmony can, in the future, have only negative consequences for the development of the press.

The research could not reliably respond to the question of the extent to which the press is being instrumentalized by the state, political parties and other institutional and non institutional centers of power. For our situation it is characteristic that the centers of power are mainly hidden. According to the formal criteria, the state is a factor with the least influence on the press (especially if we know that there is no formal censorship and that the regulations on the information are very liberal). Formally, the participation of political parties is insignificant. It could be concluded that remarkably higher influence is exerted by the non institutional factors, and individuals who act on behalf of institutions. A more thorough answer may be hidden in the almost absolute dependence of papers on donors or owners of various firms and foundations. The data on these is a business secret. There is also "gray market" of donations.

In the absence of media market, the circulation figures of papers are not the result of effectuated quality, public interest and managing in the competition process. Some of

the circulations (such as that of “Oslobodjenje”) are , because of the communication blockade and the want of paper, lower than the demand. Others, (such as children’s magazines) have high circulation figure, because they are financed through donations and are distributed free of charge. Foreign editions, parallel with domestic ones, are more or less commercial and support local non commercial issues. The media market is divided into portions: everybody reads only their press, the war conditions and the blockade of some cities do not allow their exit to wider areas. In this way many papers of the wide contents domain are actually local papers.

Sarajevo continues to be the most developed press center. It has maintained a very wide pluralist range according to various criteria: media, national, political, religion and interest. Tuzla is close to it, somewhat less Zenica. Where political diversity is in blossom, and the spirit of various social and cultural initiatives is strengthened, there are new media forms arising. Mostar has serious difficulties in media reanimation. As opposed to the prewar situation, now Travnik is being constituted as a media center. It is evident that two media fronts are being established: citizens’ or multicultural, and national.

In largely unregulated media situation with the fall of professionalism, it is possible to note some modern trends. Due to the circumstances, the concept of media mastodons and monopolist has failed definitely. A good paper of a certain profile, can today be made by only one person with good knowledge, and with a well chosen group of associates. Large daily newspapers and weeklies now have a rational organization.

5.5. NEWS INFORMATION AGENCY

Three news information agencies are analyzed and they are all in Sarajevo. These are: BiH PRESS, ONASA, and MINA. BiH PRESS is the official news information agency; ONASA is an independent agency within the framework of “Oslobodjenje” paper, while MINA is the agency of the Islamic Religious Community in R BH.

All these news agencies mainly collect information from the areas of R BH, but also from the world, and they broadcast them to domestic and foreign information media and other users. MINA covers particularly the activities in the Islamic community of R BH

and the Islamic world on the whole, or those events in the country and in the world which are of interest for Muslims.

BiH PRESS and MINA was founded during the aggression against R BH, while ONASA was founded before the aggression. BiH PRESS and ONASA broadcasts daily and special bulletins, while ONASA broadcasts the review of the press in the countries of the former SFRY.

MINA broadcasts daily and weekly summary bulletin. All of them broadcast in Bosnian and English, while MINA also in Arabic. The alphabet is Latin. The users of the bulletins are domestic and foreign information media, domestic and foreign agencies, state organs and foreign embassies in R BH. Their sources of information re the state organs, domestic and foreign information media, UNPROFOR, etc. ONASA has an uncommercial exchange with REUTER, AFP, and AP. These are, actually, compensatory arrangements. Bulletins are sold to business organizations, embassies, and foreign information media. BiH PRESS cooperates with AP and AFP and this is on the commercial basis. MINA does not cooperate with foreign agencies.

They utilize telephone, fax and e-mail for the contribution and distribution of information. They do not have radio systems. ONASA has six and MINA two journalist. Only one of them does not have a degree in journalism. BiH PRESS protect the information on their staff. Both have 12 associates in the country and 12 abroad. Seven journalists are Bosniacs, one Serb. They are in need of journalists - interpreters of an agency profile, computer specialist. Computer equipment in BiH PRESS and ONASA is in development.

All these agencies functioned in 1995 on the borderline of profitability. ONASA covers their expenses through the sale of the bulletin. BiH PRESS through donation - 90%, and through owner's funds - 10%. MINA did not specify this information. Predominant cost is: the provision of equipment, postal and telecommunication services and reproduction material.

BiH PRESS, in addition to the equipment improvement, plans to open an international press center with all the necessary equipment.

ONASA plans to equip itself with a radio system and equipment necessary for the distribution of services to economy and industry.

MINA plans to network with the international news agencies, in particular with those in the Islamic world, as well as to provide radio system equipment.

With the indicated projects of development, these agencies will satisfy the needs of R BH in the services of general purposes. News agencies with special purposes will be developing.

6. CONCLUDING CONSIDERATIONS

The review of the media situation in Bosnia and Herzegovina (though still incomplete) indicates several general conclusions:

1. Bosnia and Herzegovina's media have suffered severely in the war. Large physical destruction, occupation and confiscation of their buildings and equipment, the dissolution of the professional staff basis are some of their experiences. The communication blockade has struck in the essence of media expression - the information. The war interrupted the legal status and ownership transformation of many prewar media initiated in the beginning of nineties. These are the two main reasons for the unregulated conditions in which currently BH media operates.

2. The media picture of BH consists, to the same extent, of those organizations with prewar tradition, and those founded during the war. The number of newly established papers in relation to those prewar ones, is high. The largest number of local TV stations appeared immediately prior to or in the course of the war. The ratio between the prewar local radio stations and new ones is the same. In the course of aggression and war, the radio stations were the major information media, therefore, almost all of previous radio stations continued to function during the war as well. As for papers, only those who knew how to adapt to the new circumstances have survived. In this sense newly established media found it even easier: they did not have to rid themselves of the old practices, and in the estimate of their work, they calculated immediately the war conditions of work.

Despite the fact that all of the media are characterized, almost without difference, by the high degree of improvisation, some of them represent a pioneer example of the rational manner in which the work could be organized, in a small space and by the multifunctional use of staff and technology. Media mastodons suffered greatly in the war, but also the concept of such development has been shaken. As a contrast to these, there are innovative forms of multi-media functioning.

3. The media picture is very unstable. Many projects are of short life. Some registered printed media have practically never started their work, some cease to exist after the first or second issue. The situation is more stable with radio and TV stations.

Nevertheless, it can be stated that Bosnia and Herzegovina has experienced a media boom. Two positive factors which directly influence this are: more or less pluralistic political and social scene in the larger cities, and, liberal conditions for the establishment of public papers. Various irregular conditions distort the picture and make the real motives of media establishment unreliable: the absence of economic and market business conditions (unregulated rent, electrical energy payments, author's rights), limited participated of the real work in the expenses (the largest number of the employees are paid their salaries only from time to time, or receive minimal financial aid), various illegal situations (the absence of adequate regulations on radio frequencies and author's protection), elective attitude towards the tax obligations, abuse of advantages of "war economy", and "gray market".

4. In the conditions of the communication blockade, informative political media, particularly radio and television, have begun to explore the new sources of information, and in such a way, started to break the traditionally molded scheme of prewar media. In addition to the direct coverage of events, and take over of news from domestic agencies in development, very often, foreign radio and TV stations and direct announcement of important news by competent personalities is employed as a source of information. Forum reporting is ever more in decrease. However, this new quality of work is not only the result of well conceived editorial policy, but of good management in the impossible conditions of work. It is characteristic that some respected local papers do not have sufficiently developed contact with those sources of information crucial for the life of the population, while at the same time, they do have foreign correspondents. The traditional division into "local" and "global" (now mostly in a disorganized manner), is disappearing, which will be ever more evident in the conditions of peace. A classic, uniformed picture of media within certain media systems has become more diverse.

5. There is no media market. Media have not undertaken research of the opinion of their listeners, TV audience and readers with respect to them. The absence of competition which can only be established in market conditions takes away the incentive of media to struggle for their audience through quality and exclusivity. The struggle for donations is at work. Only a small number of them manages to this or that extent to cover its expenses at least partially through the sale of its circulation, propaganda, and

various services. Some exceptions are TV stations whose income includes a larger participation of commercial propaganda services.

Media management is undeveloped and unknown to most of the media. The absence of conduct according to the law of the market benefits the reactivating of the old premise that media is, in the first place, a part of the political function of the system.

6. The research has yielded a range of interesting data on the relation of the type of ownership and editorial policy. Motives of owners with private capital to found a form of media are rather hidden. Only indirectly we can anticipate their complexity: investment of the surplus of capital for the purpose of gaining profit, promotion of one's own product and services, political promotion, humanitarian support to media projects, personal media affinities, even various calculating reasons. General instability and "hidden agendas" in media business has caused a quick exhaustion or quitting the project.

Nevertheless, some positive characteristics of a strong influx of private capital in the media can be noted. It is because of this engagement that some of the papers, radio and TV stations were established which are of high democratic culture, independence and media attraction. The stabilization of the market conditions of business will clear all the controversies in the current conduct of private capital. It will, no doubt, be the major initiator of the reconstruction and development of media and media systems in the impoverished country.

7. Current media regulations is insufficient and anachronous to support complementary development of commercial and public media systems. Also, there is a terminology confusion as well, in this regard.

The ownership transformation of some media in social property has yet to be completed. They are still treated as state owned, some even have an undefined owner. A concept of public interest in information is identified as state interest. The halting of the status and media transformation of Radio and Television BiH, as well as a number of former local radio stations whose founders are municipalities can have serious consequences on the development of these systems. Public interest is legitimate, while not a single state can be without its so called national radio diffusion network. There is no justification for such long unresolved relations between the local and private radio and TV stations on one hand, and Radio and Television BiH on the other, while the users frequency space is insufficiently utilized.

The collision in the interpretation of jurisdiction between the Republic and Federation of BH continues to block the work in the legal regulation of this field.

8. The war has broken the touch of the majority of the media with current modern trends in the technology development. New information is lacking on new equipment and standards. The level of knowledge of their technical and technological bases is very low with the most responsible people in the majority of the media, except in the most developed ones. Knowledge and information on these issues are so alienated from the editorial teams. There arises a specific close lobby in the sphere of computer, audio and video technology, which will, through the logic of their findings and interests, dictate, for a long period of time, orientations and development, in particular, that of the small media. Inherited monopolies in the graphic industry, which has, in addition, experienced tremendous devastation, and is far behind the world trends, will be a limit of development in peace or in the more stable conditions.

9. The problem of professional staff in all structures and of all levels is very prominent. The poll participants usually reduce this issue to the problem of journalists and technical operational staff, and they do not place it as a top priority. Our evaluation is that this problem relates also to professional media managers, marketing experts, economic propaganda experts, lecturers, and experts for speech culture, system engineers, maintenance experts, qualified music editors. Some media professions (and professional knowledge) have simply disappeared: director, screen play writers, drama experts.

It is positive that (more out of necessity, less out of well conceived production system) multifunctional staff is being formed. A very positive trend is a fact that majority of media respects and employs the knowledge of a foreign language, which is an element of media de-provincialization.

Editorial teams hire mainly young people, but inexperienced and professionally insufficiently educated. Their training is not on the list of key priorities. The placement of the exclusive priority on the technical equipping decreases the professional outlook of the media.

The research "Media Picture of BH" has covered approximately 75% of the active media in the free territories. The research team considers this to be a satisfactory basis to note general trends and phenomena which we have indicated in the result of the research.

The data and the observations reached in the research of "Media Picture of BH" lead to many other conclusions and estimates which are not the subject of this report. The

extent of their founding can be obtained only through an analysis of their contents and audience investigation.