



LOCAL ELECTRONIC MEDIA IN KOSOVO

An Analysis by Eberhard Laue

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August 2005

This document provides the findings of a survey on the status of electronic media with an emphasis on local broadcasters in Kosovo.

Confidentiality of sources is protected herein.

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Narrative

Executive Summary

The status of the local broadcasting sector in Kosovo is, except of few stations, devastating. This includes the economic condition, as well as professional standards, programming and employment environment. First impact on the acceptance by the audience is visible. A significant number of broadcasters survive only because of donor support and KFOR payments. It is foreseeable that the fatal spiral the sector has entered already will gain significant momentum as soon as the international support dries up further and license and copyright fees are introduced. First stations had to cut their operation below minimum standards, with their staff reduced to zero, emitting only music. Multi-ethnic broadcasting – especially Serbian/Albanian - is widely rejected and only accepted as donor financed projects.

These are the key findings of an assessment analyzing the status of Kosovo's local electronic media sector. The survey was conducted between September 2004 and March 2005, updated in August 2005 and has used quantitative and qualitative methodologies.

Structure and Licenses

As of August 26th 2005 there were a total of 111 radio and TV channels licensed. 4 additional stations were about to receive permission by the Temporary Media Commissioner (TMC) to operate.

Media	Kosovo-Wide	Regional	Local	Low Power
Radio	4	0	74	11
TV	3	1	16	2

Source: www.imc-ko.org

Considering an estimated population of two million people and, but not exclusively, Kosovo's poor economy, the broadcasting market is oversaturated. The reason for the high number of media outlets must be seen, according to Robert Gillette, current TMC, in the uncoordinated licensing of stations by UNMIK and KFOR in 1999/2000 as well as the "initial licensing policy of the TMC". This policy aimed on utmost pluralism and the maximum right of freedom of expression.

Although the majority of stations have a local or low power license, granting permission to cover their respected municipality, most of them claim to have a regional footprint of up to two-thirds of Kosovo. This causes extreme competition for audience and revenue.

Aside from exceeding the assigned footprint, stations – with few exceptions - also don't operate in accordance with their initial application for their license. They often comply with neither the economic planning, nor the employment figures or programming set forth in the submitted documents providing the basis for the licensing process. The concept of establishing broadcasters to provide news and informative programs has not gotten beyond wishful thinking. Exceptions are rare and mainly donor financed.

One of the reasons for the devastating situation of the local broadcast sector, aside from over-saturation, but not disconnected from it, must be seen in the station management. Only 21 percent of key personal had previous management experience and only 41 percent had worked in media before opening their station.

Very few managed to develop an individual profile for their radio or TV which would distinguish it significantly from competitors. According to respondents there was also almost no sustainable training provided for management staff.

Economic Status

Consequently merely 26 percent of the broadcasters are able to cover their budgets from operational revenues generated by advertising and paid wishes and greetings. The poor advertising revenue is also caused by the fact that only few stations have professional marketing agents, reflecting the poorly developed management concepts. Some are so desperate that they undercut each other's advertising rates by up to 80 percent.

Financial dependence on international donors and especially KFOR in some regions is still high. Forty-eight percent of stations show a negative balance even with international support.

Deficits, which would lead to delayed salary payments and invoices, are either covered by transfers from families abroad or the owners' private financial resources. If it is not possible to balance the budget even the essential bills for operation like electricity and communication are left unpaid. As a result a number of stations have no regular phone line anymore, access to internet is limited, and salaries are late by up to half a year. Permanent threats for the Serbian stations are the electricity bills which remain also unpaid by almost all citizens in the enclaves.

Programming

The financial situation with its serious impact on staffing tables and professional standards of employees, consequently forces stations to limit their programming in all respects. Citizens and representatives of civil society complain widely about unsatisfying local programming, woeful professional standards and language usage. Especially criticized is the lack of local news. Respondents indicated also declining acceptance of these broadcasters. Declining revenue from paid wishes and greetings in these stations seem to proof this development.

In some cases journalists have complained about a difficult relationship with the municipality, police and other authorities although the overall rating of access to information is good.

Police officials as well as municipal information officers complained on the other side about poor professional education of journalists, who would often neither know the rules of procedures nor their general responsibilities.

Minority Programs

The fear of declining revenue was given as the main reason for reluctance to establish minority programming – especially with content in Serbian. This reflects, according to media managers and journalists the strong opposition of citizenry to such programming in general and consequently to reconciliation. It must be stated, however, that this is not a homogeneous phenomenon throughout Kosovo. More openness to multi-ethnic programming (but certainly not full acceptance) is recognizable in the Prishtina/Pristina, Prizren and Kamenica region.

Minority/multi-ethnic programming is in most cases donor-driven and discontinued after expiration of the externally financed project.

Thus it must be assumed that the majority of the local electronic media are not fulfilling the requirements as defined in the Kosovo Standard Implementation Plan.

Staffing and Employment

Salaries, often significantly below the average income of app. 200 €, allow mainly employment of only young and inexperienced staff. Working in media is often seen as a temporary solution until a better paid job is found. The turn-over is accordingly high in a number of stations, having serious impact also on the effectiveness of training programs by the international community.

Conclusions and Recommendations

The overall devastating situation prompts the conclusion that the initial licensing policy which could be summarized by “the more media, the more democracy and human rights” has collapsed like a hot air balloon at high altitude: leaving nothing behind but shattered broadcasters on life support from the donor community and KFOR. The combination of all these factors has led to a fatal downward spiral for the entire broadcasting sector.

The findings of this analysis lead to a two fold set of recommendations to ensure equity, fairness and diversity in the local electronic media sector in the public interest:

- **A strong regulatory institution** (IMC) which must be politically and otherwise balanced. The IMC should have permanent excellent background information in order to provide the necessary guidance and ensure compliance with licenses.
- **Professional Media** operating on high journalistic and editorial standards with a solid sustainable economic and managerial basis.

In detail these sets of recommendations comprise of:

- A re-licensing process aiming on a consolidated sustainable media landscape; emphasizing foremost qualitative criteria instead of applying the concept “survival of the fittest”.
- A strong monitoring unit which could but must not be attached to the IMC to ensure license compliance. (Also having a self-sensor function by its mere existence.)
- Local Public Service Broadcasters controlled by independent multi-ethnic broadcasting councils to foster real multi-ethnic broadcasting where applicable; partly financed with the subscription fee to reduce vulnerability of external influence.
- A strong mid career educational institution for journalists to build a sustainable professional core group of journalists and managers. (To improve economic sustainability the above mentioned monitoring unit could be attached.)
- A strong self-regulatory body comprising of all broadcasters as a counterpart for the IMC as a potential co-regulatory body (content, advertising, protection of youth, code of ethics etc.) and a focal point for

Donors, but also to minimize the theoretic risk and impact of a politically or otherwise unbalanced IMC.

Methodology

This assessment has used quantitative and qualitative instruments:

- A complex questionnaire, covering, inter alia, basic data, employment conditions, programming, stations' financial status, and their technical standards.
- Face to face interviews with three groups:
 - Owners/managers of all broadcasters
 - Journalists of electronic media to cross check information provided by management of broadcasters. These interviews were conducted outside the stations without the management being present.
 - Representatives of civil society in all relevant municipalities.

The collected data and information are incorporated in a database and a detailed report.

The starting point of the analysis is the information submitted by the broadcasters with their license applications as the legal basis for their operation. In addition the report also refers to existing documents and reports of the OSCE Mission in Kosovo and other organizations.

The survey evaluates and monitors:

- the general structure
- basic data (footprint, competition, frequencies. sociological environment, etc.)
- ownership
- political affiliation
- ethnic affiliation
- employment situation (social security, education, etc.)
- technical standards
- legal background (license)
- content and programming
- journalistic aspects
- program quality
- program structure
- minority issues
- economic sustainability
- financial concepts, status and viability
- marketing
- acceptance by audience
- relationship between citizens and media and the role in society
- relationship between local governments and other institutions
- the relationship to international community and donors

Limitations and Constraints

The most significant limitation to the conduct and findings of this survey were the data provided by the majority of broadcasters. In many cases it was evident that figures and numbers were inaccurate or false, may it be unintentionally or with a hidden agenda. Crosschecks revealed often the reality but some facts remain questionable.

Furthermore, while not a subject of the survey itself, it must be noted that most broadcasters have extensive experience with the terminology used by foreign donors and international organizations in order to receive financial support. A number of respondents may have tailored their answers in response to perceived expectations.

An additional constraint was the hesitation and/or unwillingness of sources to speak openly. In many cases respondents were reluctant to provide off-the-record information as well. The fear that others in their communities or employers might discern their identities was in some cases clearly evident.

History and Background

The abolishment of Kosovo's constitutional autonomy on the 5th of July 1990 by Slobodan Milosevic's regime led to the final extinction of Kosovo's political powers with an attendant severe impact on its cultural autonomy. What had already begun with a series of new measures decreed by the Serbian assembly in March 1990¹ resulted in the ban of the only Albanian language newspaper Rilindija and cessation of TV and Radio broadcasts on Radio TV Priština (RTP) in Albanian.

A half hour Albanian-language news program from Belgrade had no credibility among Kosovar Albanians². The small number of municipality owned local broadcasters under control of Serbian political forces were also only seen as mouthpieces of Serbian authorities. Consequently most ethnic Albanian employees in the media lost their jobs, up to 1300 to 1500 journalists and other media workers. Only employees who signed loyalty pledges, which most Albanians would not or could not do, remained in their positions.

Whereas during most of the 1990s a small number private newspapers and magazines (some illegally published) started circulating, private Albanian broadcasters didn't exist until the late 1990s. Kosovo Albanians had to rely almost exclusively on Albanian state broadcasting which was aired for two hours daily by satellite from autumn 1993. As a result Kosovo Albanians had to live in a "Media Darkness", as media professionals and citizens have put it.

When NATO forces entered Kosovo on June 14th 1999 the province had neither a functioning government, administration nor a legal system. Based on the UN Security Council resolution 1244 passed on June 10th 1999 the United Nations Interim Administration Mission in Kosovo (UNMIK) was established. The mission's mandate included ultimate legislative and executive power and comprised four pillars vested in the Special Representative of the Secretary General (SRSG). These four pillars were each lead by an International Organization. The Organization for Security and Cooperation in Europe (OSCE) was charged with Democratization and Institution Building, including the media sector.³

Neither the "Interim Agreement" for Kosovo⁴ nor the mandate of the OSCE Mission in Kosovo (OMIK) provided clear guidelines for the development of Kosovo's media landscape. Such standards were developed later following a report commissioned by OMIK.⁵ Based on this report the objectives and priorities were defined by the UN and the OSCE as follows: to "prepare media regulations, support for independent print and broadcast media in Kosovo" and to "monitor the media and develop media laws and standards". The SRSG would "appoint a media regulatory commission to manage the frequency spectrum, establish broadcast and press codes of practice, issue licenses and monitor compliance".

¹ "Programme for Realization of Peace and Prosperity in Kosovo" in accordance with the "Yugoslav Programme of Measures to be Taken in Kosovo", passed by the federal assembly in January 1990. (See Noel Malcolm, Kosovo – A Short History, pp345-347.)

² Mark Tompson, Vienna 2000, "International Assistance to Media", OSCE Representative on Freedom of the Media

³ The Permanent Council of the OSCE established with its decision 305 on July 1st 1999 the OSCE Mission In Kosovo (OMIK) as a "distinct component within the overall framework" of UNMIK, where it would "take the lead role in matters relating to institution- and democracy-building and human rights

⁴ The so called Rambouillet Accord, Februar 23rd 1999, referred to media only in Chapter 3 "Conduct and Supervision of Elections" as a condition "for the organization of free and fair elections, which include but are not limited to: ... d)... freedom of Expression f) free media...."

⁵ Dan De Luce , Office of the High Representative in Sarajevo, Dr Regan McCarthy, OSCE Mission to Bosnia and Herzegovina, and Mark Tompson, OSCE Representative on Freedom of the Media.

The UN Secretariat emphasized that the SRSG would actually issue the media regulations and appoints ethnic Albanian journalists as members of advisory or consultative bodies. Thus, it was agreed at the outset that OSCE-MIK would - in the words of the UN's head of peacekeeping operations - perform "all substantive and preparatory work on media issues", while the United Nations - in the form of the SRSG - would take the key decisions."⁶

Struggles over responsibilities between the UN and the OSCE caused serious delay in implementing this strategy. It took for example until June 17th 2000 to establish the institution of the "Temporary Media Commissioner" (TMC)⁷ as the regulatory body.

In the meantime the vacuum in the Albanian Media sector left behind by the general ban on Albanian radio and TV programs between 1990 and 1999 had been filled quickly. By early September 1999 KFOR had already given 39 radio stations FM frequencies. Some of them were licensed by UNMIK; some had started to broadcast without any legal permission. Additionally, 24 television stations were by early 2000 either waiting for licenses or equipment to start up. Many stations were heavily supported by international donors "who seemed less concerned about programme content than about getting something on the air", as the Tompson report states.⁸

As a result station owners developed a heavy "cargo cult" mentality⁹, expecting heavy financial and technical support from the outside without feeling obligated to improve standards and programming. A respondent in this survey expressed this very clearly: "The OSCE should have given every station 20.000 DM and than they should have left us alone". This approach as well as the delay in establishing a solid regulatory body has had a dire impact on the development of the media landscape still obvious today.

But the nine year ban on Albanian language broadcasting not only had an impact on access to information for Kosovo Albanians, but it also created a vacuum in human resources. Then the fact that there were hardly any ethnic Albanian Media Managers and Journalists left caused a serious deficit in professional standards in the newly created media.¹⁰

These deficiencies became especially evident in reporting on the events in March 2004. Analyses by the OSCE Representative on Freedom of the Media as well as the Media Taskforce established to investigate the coverage and others drew the conclusion that these media clearly contributed to the development of the crises and fueled the violence.

This survey implements one of the recommendations of the Taskforce. It provides an overview of the status of local electronic media and an in-depth analysis of the situation. It also contributes to the assessment of which extent local broadcasters will be able to face the "challenges ahead" as formulated in the Kosovo Standard Implementation Plan¹¹, i.e.: "The media should ensure access to information by all communities in their mother tongue, and education in journalism should be made available without discrimination, in order to create a firm basis for

⁶ Mark Tompson, Vienna 2000, "International Assistance to Media", OSCE Representative on Freedom of the Media

⁷ See UNMIK Regulation 2000/36. New legislation that would transformation the TMC into an "Independent Media Commission" (IMC) is currently under preparation.

⁸ Tompson *loc.cit*

⁹ An almost religious belief on the part of recipients in the inevitability and rightness of foreign assistance, or "cargo" – the expression originating in the South Pacific in World War II.

¹⁰ See "Structure of the Local Broadcasting Sector, Management pp15"

¹¹ Presented by the United Nations Interim Administration Mission in Kosovo on 10. December 2003

qualitative journalism in the future. Media should be ready to perform in a professional way when confronted with challenges of ethnic tension, and foster notions of ethnic tolerance and cooperation. The media and civil society have an important part to play in monitoring and enhancing democracy in Kosovo. In particular, action needs to be taken to ensure professional, responsible, and non-discriminatory media that caters [sic] to all ethnic communities. The violence of 17-20 March and the irresponsible role played by some in the media underline this need.”

Structure of the Local Broadcasting Sector

Overview

As of August 2005 a total of 111 radio and TV stations operated in Kosovo. With an estimated population of only 1.9 to 2.2 million people, Kosovo ranks amongst the entities in the former Yugoslavia having the highest number of broadcasters.

Media	Kosovo-Wide	Regional	Local	Low Power
Radio	4	0	74	11
TV	3	1	16	2

Source: www.imc-ko.org

The reason for the high number of media outlets must be seen, according to Robert Gillette, current TMC, in the uncoordinated licensing of stations by UNMIK and KFOR in 1999/2000 as well as the “initial licensing policy of the TMC”. This policy aimed on utmost pluralism and the maximum right of freedom of expression. (See “History and Background”)

The density may be seen to be even higher considering the footprint of the individual stations. The TMC has handed out mainly local and low power frequencies – only seven of the total are Kosovo-wide - indicating an emphasis on local broadcasters; however geographic conditions (and sometimes tampering with transmitters) allow a much bigger service area. Eighty-two stations consider themselves regional, and cover up to two-thirds of Kosovo’s area. We see that the answers to the question about their intended footprint reveal that the vast majority of owners and managers aim for Kosovo-wide coverage.

This multiplies in many towns and villages the number of available broadcasters and as a result the competition for audience and revenue. A perfect example is the situation in the Serbian enclaves north of Prishtinë/Priština. Radio Mix is located in the village Priluzje and has a low power license. Radio Elit broadcasts from the neighboring village Plemetina, and “Radio M Babin Most” from Babimoc/Babin Most is in close proximity. The latter two competitors were initially not licensed – they operate under a preliminary agreement with the TMC¹² – and have a low power status.

All three broadcasters cover the same area with an estimated population of 10.000 people. They have similar profiles and generate their revenue mainly through paid wishes and greetings. Radio Mix has considered itself the only legitimate station in the region and estimates that Radio Elit takes 35 percent of the potential revenue and Radio M Babin Most an additional 15 percent. Consequently Radio Mix claims not only a deleterious impact on staffing and programming and but sees also as a consequence severe risks to long-term survival. The concerns of the other broadcasters because of the competition are similar.

¹² Both broadcasters will receive according to the TMC a license later 2005.

However, in August 2005 the TMC will grant an additional license to a fourth broadcaster in the area¹³. It will most likely go to Radio Europa, which intends to operate as a multi-ethnic broadcaster with regional footprint. The financial concept presented by the stations management is vague and the expected revenue, especially for a multi-ethnic station with 13 to 20 employees, unrealistic.

The situation of almost all other broadcasters in Kosovo is analogous: they are competing for the same revenue; only few have developed an individual local profile. This includes the 26 broadcasters which categorize themselves as local. Respondents confirm this by criticizing the lack of reporting on local issues. Most stations equal size of footprint with revenue, without providing appropriate programming and realizing that the size of the footprint could also have negative impact on their advertising revenue.¹⁴

Intention and Reality

Intention and reality do not only differ regarding the service area of broadcasters. Following the withdrawal of Serb authority in Kosovo in 1999, and for the first time in Kosovo's history, future media owners pursued the idea of creating independent broadcasters in their communities. The majority of managers claim that their main objective was to "fill the information darkness, created by the old regime". This intention is well documented in the license applications submitted to the office of the Temporary Media Commissioner. Information gained from field visits, interviews and review of other data and documents reveals that in most cases the initial goal did not move beyond the status of an idea, not to say wishful thinking.

With only few exceptions none of the broadcasters has implemented what was stated in the application, including the program scheme, or fulfilled economic standards and employment figures. And some of them had never the intention to do so. "These owners were simply lying", said one insider, familiar with the licensing procedures. Respondents also mentioned professional ghost writers drafting applications with the right vocabulary to meet the requirements of the licensing authority. Only one broadcaster returned the license immediately after realizing that he couldn't possibly handle a TV and a radio station with his available financial resources. And even the radio operates now to very basic standards.

A small number admit that they saw primarily a business opportunity in starting a broadcaster. And like Radio Kolasin in Zubin Potok or Radio Fortuna in Ferizaj/Uroševac they have proven to be quite profitable with their basic program and minimal employment concept. Others are chasing the donor community for funding. (See Donor Dependency)

How these self-interests dominate over improving long-term professional standards and content was shown in the board meeting of the network CERPIK in September 2004. This project, fully financed by the international community, aims to facilitate inter-station exchange of programs with an informative multi-ethnic character. The discussions over the uncertainty of future donor assistance and accusations of mismanagement of the network revealed that the engagement of a number of members is driven largely by primary financial interests. The

¹³ The TMC had tendered in December 2003 a number of new licenses for "areas not currently served by local media, regardless of language and to enhance minority/multi-ethnic broadcasting". The internal decisions were made mid 2005 but only partly published by mid August 2005.

¹⁴ Sieben et al, Köln, 1996

projects risks falling apart; and by now the more serious core stations plan to develop an alternative to the project.

Other local and foreign organizations relate similar experiences, noting that program elements developed with their support will most likely not survive once donor assistance ceases.

The argument that the economy is not sufficient to meet the submitted financial planning of the application and support a local station is partly valid. A small survey done by one of the broadcasters on the economic impact of lay offs by KFOR reveals additionally a significant drop of buying power in the respected region.

On the other hand have only a small number of stations a professional marketing department. Not to forget the fact that stations with a large regional coverage are not necessarily of interest for local businesses and that main parts of the revenue are generated through contact programs with paid wishes and greetings.

The unmet financial planning is also reflected in the staffing tables which differ substantially from the initial submitted documents.

However, some positive examples illustrate the intention of a few stations to distinguish themselves from competitors. Radio Kontakt Plus in Mitrovicë/Mitrovica for example has a strong emphasis on high quality news and informative programs, Radio Fontana in Istog/Istok established a program scheme with basic characteristics of format radio.¹⁵ Radio Tema in Ferizaj/Uroševac and Radio Dodona in Glogovc/Glogovac have become valuable players in the local society also outside their role as media.

Management

One reason for the deficits and general lack of diversity aside the listed exceptions and concepts focusing on local communities must be seen in the structure of ownership and management. The majority of applicants for broadcast licenses under the UNMIK/OMIK administration had little or no experience or appropriate educational background. Most were young and had neither worked in media management or journalism before. Older Journalists who were previously employed in municipality or state owned media, controlled by the League of Communists, are the exception. This vacuum is clearly a result of the nine year ban on Albanian radio and TV programs and ethnic Albanian journalists during the Milosevic regime between 1990 and 1999.

The survey reveals that merely 21 percent of the key personal had prior experience in management. Their previous professions range from musicians to teachers and/or hairdressers. Not more than 41percent had ever worked in journalism before starting their stations, which explains the severe weaknesses in understanding the concept of media, providing balanced news, to serve their audience and also function as a Fourth Estate and not as just a jukebox.

Until now, the majority of stations have not been able to develop and implement a financially viable strategy, especially one that provides programming in accordance with international standards and a sustainable work environment.

¹⁵ The owner spent some time in the United States and applies some characteristics of American broadcasters to his station, without being aware of the underlying concept and structure of a format radio. As a result the implementation of these characteristics depends mainly on the staff. If key employees should leave there is no guaranty that the station will be able to continue that way.

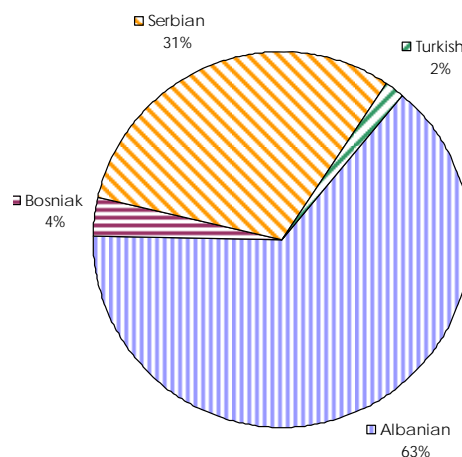
The training provided by the international community, according to respondents and reports of media program implementers focused mainly on journalists and technicians but not on management.

Ethnic Structure

The analysis of the general ethnic structure of broadcasters reveals a significant surplus of Serbian stations compared to Albanian stations in relation to the estimated ethnic composition of Kosovo's population¹⁶. This reflects to some extent the fragmented Serbian population south of the river Ibar, raises on the other hand questions regarding the sustainability of the individual broadcasters. KOSMA, a network of 27 of these stations attempts to tackle besides program exchange and joint news also this issue. According to station managers the project has not met expectations regarding advertising business and is still facing technical problems.

Overview of the ethnic structure¹⁷

Albanian	71
Bosniak	4
Serbian	34
Turkish	2



Situation of Serbian Broadcasters

Serbian broadcasters in Northern Kosovo and Albanian broadcasters south of the river Ibar exist under market conditions. However, the situation faced by Serb stations in the south must be evaluated employing different criteria. Compared with other stations, they do not have a comparable footprint-size and consequently the number of potential listeners, nor do they have similar marketing opportunities.

Furthermore, a number of these stations serve still in large part as a “psychological relief instrument” regarding post traumatic stress and retaining an identity. While it is difficult to assess the impact of this on the development of a sustainable media landscape, it remains a factor for the time being.

According to respondents exists also an informal network of some Serbian stations, connecting them through TV Most with the Serbian State Broadcaster RTS. Purpose is, so the sources, financial support as well coordination of broadcasters and last but not least influence on the editorial policy.

¹⁶ The UN estimates Kosovo's ethnic composition as 88 percent Albanian, 6 percent Serb, 3 percent Muslim Slav, 2 percent Roma and 1 percent Turk.

¹⁷ A detailed overview over footprint, ownership and ethnic structure is provided in the Graphic Analysis in the Section “Data Analysis, Local Broadcast Sector” pp36.

Multi-Ethnic Broadcasters

Only three broadcasters can be considered multi-ethnic: Radio K, Fushë Kosovë/Kosovo Polje, Radio Kontakt, Prishtina/Pristina, and Radio Yeni Doenem, Prizren. All three have not only different editorial teams, these teams actually cooperate. It must be said, that all three are also heavily donor dependent. Operational income does not support the first two stations at all. Radio Yeni Doenem had, according to the owner, to take a 50 percent decrease in advertising revenue over a period of six months. Obviously advertising clients didn't approve the new concept. Over time the management has attracted new clients of the other ethnicities, and by now the advertising revenue has almost recovered.

Nevertheless the location of the three broadcasters is no coincidence. Prishtina/Pristina and Fushë Kosovë/Kosovo Polje represent the main populated areas and Prizren is traditionally a multi-ethnic town where it is not unusual for people to speak four languages.

A fourth municipality where attempts were made to establish a multi-ethnic broadcaster is Kamenica/Kamenica. Radio Kamenica, initially a municipal broadcaster founded in 1997, was re-established after the war with the strong support of KFOR and UNMIK. The condition for this support was a multi-ethnic structure. As a result of this demand Kosovo-Serbs and Kosovo-Albanians formed a radio station with two independent editorial teams working side by side.

But the concept of multi-ethnicity has failed. The Kosovo-Serbian part of the station has requested a separate frequency. The management claims that cooperation on a business level has not worked out. The key-personal are willing to form a new alliance with an Albanian editorial team because they see in this the best chance to receive donor support.

The fifth broadcaster aiming on multi-ethnic broadcasting is TV Herc in Štrpce/Shtërpçë which was established exclusively with donor money. The target group is the Albanian minority of 4000 people. The station is far from being sustainable and the Albanian programming was cancelled during the winter 2004/2005 for weeks because the staff was not paid and went on strike. The future of the station must be considered very uncertain.

In addition to these stations are a number of broadcasters claiming to have minority programming¹⁸. Statistics published by the TMC list a total of 25 stations (including the Kosovo wide channels) with at least two languages. However, this register does not specify the type of programming nor the quantity. In a number of cases it consists of nothing but music.

The CERPIK project, connecting eleven stations of different ethnic backgrounds also aims for multi-ethnic broadcasting¹⁹.

¹⁸ See Programming pp26

¹⁹ See Networking pp20

Technical Standards

Technical standards range from state-of-the-art, digital editing and broadcasting equipment in modern studios, as at TV Energij in Gjilan/Gnjilane, to an old microphone and tape recorder connected to an even older transmitter in a small shed which is hardly identifiable as a radio as at Radio Bambus in the remote village of Restelicë/Restelica in the mountainous pocket between Albania and Macedonia.

The majority of the stations operate with a mixture of analogue and digital equipment. Most of it is basic, reflecting the patchwork nature of donations and limited resources. Only few have self operating studios which would allow more efficient use of staff and resources. Most stations require two people – a moderator and a technician – and extra equipment.

Technical limitations were also named as the main obstacle to preserving material as required by the TMC²⁰. Although 72 percent comply with this obligation only 14 percent of these actually record entire programs²¹. The others are only saving news and informative programs, often only the manuscripts but not the actual broadcast. A number of managers do not understand why they are required to preserve the aired programs or the music. “The paper is easier to keep and for the music we have lists”, was a common response to the question about archiving.

Networking

Over the years a number of attempts were made to create networks of stations throughout Kosovo, aiming at program exchange and improving financial sustainability. All were established with major donor support.²²

KOSMA

The most ambitious effort is KOSMA, Kosovska Medijska Asocijacija, which is facilitated by the OSCE Mission in Kosovo. The network started as an idea of Radio Kontakt Plus for a comprehensive election project in 2001. Over the time it has developed into a major project aimed at connecting 27 stations covering up to 100.000 potential listeners.

The objective is to tackle the lack of news and informative programs, considering also the restricted freedom of movement in the often isolated enclaves throughout Kosovo. “Very few [stations] produce their own news” states an OSCE report. “They mainly re-broadcast news from Belgrade thus not only neglecting the reporting of events from the whole of Kosovo but giving room to a mainly Belgrade-focused reporting. In addition, many of the stations do not have enough professional journalists to prepare objective news from independent sources in a technically and journalistically professional manner”.

²⁰ Broadcasters are required to record and keep their entire programming for 21 days as part of their license agreement. The TMC has the right to request the archived emissions.

²¹ Figure is based on data collected in 4/2005. In the meantime the TMC has conducted a campaign emphasizing on the obligation to keep an archive. However, especially the smaller stations are still struggling with technical obstacles.

²² Annex 2 p35 provides an overview of the main networks.

When the project finally went on the air in fall 2004, five core stations were identified to produce 20-30 minute long news shows and broadcast with linked transmitters. In addition generators were provided to all KOSMA stations to ensure broadcasting even during power cuts. The total investment was €260.000. The remaining stations are supposed to pick up the signal and rebroadcast it simultaneously. Although these smaller radio stations are only able to receive material, they will still be in daily contact with the respective two-way linked stations of their regions by phone and/or email. The news programming made by the primary stations will be re-broadcast by the smaller network member stations Kosovo-wide.

Topographic and technical problems still prevent a number of stations from participating. And two stations, Radio Kolasin and Radio Gracanica, have decided to leave the project. Radio Kolasin was not satisfied with the management structure and Radio Gracanica would not accept news covering issues of other ethnicities.

Whereas the stations in general are content with the programming – although there are complaints about unequal professional skills and standards – the majority of the managers are not satisfied with the economic impact. “We expected a lot more. So far nothing has happened to make the advertising situation better”, says one owner.

CERPIK

The “Cross-ethnic Radio Programming in Kosovo” (CERPIK) was proposed and realized by Internews Kosovo and Swiss Medienhilfe. Initially it included 11 Albanian, Serbian and Turkish stations throughout Kosovo. “Goals are strengthening of democratic structures and social and political reconciliation; understanding of and tolerance among members of the different ethnic communities in Kosovo; interethnic cooperation of journalists and editors as well as of Radio stations in the different local languages”.²³

The CERPIK participants are supposed to meet weekly in Prishtina/Pristina. The working language is mainly Serbian. (Most Albanian participants still speak Serbian, but the Serbians don’t speak Albanian.) The initial concept was to produce 15-20 minutes weekly. Smaller stations consider CERPIK a significant source of revenue. Every news piece is paid for by the Donor with € 60 for 2.5 minutes/week.

Interviews as well as a board meeting of the participants in September 2004 indicated that a number of stations are mainly interested in individual donor support.

Following a major controversy half the stations left the project. New members joined the network which comprises now 8 stations.

Network of Local TV Stations

Six local TV station under the leadership of TV Prizreni have formed an informal network aiming at program exchange, joint program purchase²⁴ and marketing. The main challenge is to link the stations physically. Although, according to

²³ <http://www.medienhilfe.ch/Partner/KOS/2002/annexc.pdf>

²⁴ The network calculates the fee for a movie at 18 Euro/station compared to 200 Euro if the copyright is purchased individually.

participants, IREX has according to network members promised to finance the transmitters, the support never materialized.

Economic Status

Sustainability

Economic sustainability is not a guarantee for independent journalism but an almost essential precondition. And sustainability does not only mean a balanced budget, it also means sufficient revenue to operate the station in accordance with certain standards regarding salaries and programming. But the vast majority of local broadcasters in Kosovo do not even meet minimal standards here. Staffing tables are basic, and salaries significantly below the average income in Kosovo.

The analysis of the individual broadcasters shows that according to the provided data only 25 percent are in either good or excellent economic condition. Fifty-six percent must be categorized as sufficiently sustainable; eighteen percent are on the verge of bankruptcy. And this already includes donor support, KFOR payments and support through own financial assets as well as donations of family living abroad. A number of stations had to reduce their staff by more than 50 percent over the last five years to reach even this level.

The assessment of budgets based on the operational revenue provides an even more negative picture. Sixty-one percent of the broadcasters not able to cover their expenses through regular revenue like advertisements, paid wishes and greetings, sponsoring and bartering. It must be expected that the picture will get a lot worse as soon as broadcasters have to pay license and copyright fees.

Especially desperate is the situation of most minority broadcasters, especially the ones in smaller Serbian enclaves like Gorazdevac/Gorozhdec, Rahovec/Orahovac, Suvo Grlo/Suhogerl, Babimoc/Babin Most, Priluzje or Plemetina. The situation is also problematic at new multi-ethnic broadcasters like Radio Youth Voice in Novobërdë/Novo Brdo. Although the purchase of equipment and core salaries of one year are covered by an Italian donor, it is foreseeable that the station will have severe problems to stay on air after the support expires.

This lack of financial resources has a serious impact on program quality, employment standards, and last but not least on acceptance by the audience. The weak budget situation makes broadcasters also extremely vulnerable to attempts to influence their editorial policy. Respondents admitted such moves by political parties and commercial enterprises. Critically, KFOR, according to complaints by some respondents, was criticized for possibly using its financial power to influence stations

The consequences of the devastating financial situation have already become obvious. The first stations had to shut down or were sold. Some radio owners expect that – at least in the central and northern part of Kosovo - up to 40 percent of the local broadcasters will have disappeared in 2005. Although this prediction has so far not become reality, mainly because of delayed implementation of copyright and license fees, it is only a matter of time till the economic agony of many stations comes to an end.

In the South and South-East the financial contributions of KFOR prevents a number of broadcasters from facing a similar destiny immediately. But KFOR is

also reducing its involvement, and where the contracts with KFOR are not prolonged, stations face bankruptcy.²⁵

Structure of Budget and Revenue

The analysis of the revenue structure shows that 28 percent of the stations generate a third of their budget through fees for wishes and greetings. Depending on competition and the area, broadcasters charge up to €3 for this service. But managers observe decreasing interest throughout Kosovo – especially at stations with limited programming as some respondents state. Main business periods are during summer and winter vacations, when relatives from abroad are visiting and main religious holidays.

Revenue through advertisements in 42 percent of the stations is between zero and 30 percent. Seventeen percent of the stations cover their whole budget entirely through advertisements or make a profit (12 percent). Managers blame this situation mainly on the weak economy. Another reason given is that local businesses don't understand the importance of marketing and that even the small number of advertisements is based on personal connections.

Especially in the case of the smaller Serbian enclaves respondents claim, that there is actually no need for local restaurants or shops to place radio or TV spots. "Why should we advertise? People can't go anywhere else in the first place and I have no competition anyway", says a restaurant owner in Rahovec/Orahovac.

The attempts to use networks as a potential booster for advertising have so far not been successful. Neither Kosma, the network of 27 Serbian stations, nor the network of six local TV stations has been able to attract bigger companies as advertisers and compete with Kosovo-wide broadcasters.

Managers especially in the Gjilan/Gnjilane and Prishtinë/Priština regions are concerned about broadcasters undercutting advertising rates. "Instead of charging €100-150 as listed, they give the spots away for as little as €20", says one manager. In Prishtinë/Priština one station offers advertising over a period of three weeks even for free, hoping that the clients would stay with station afterwards. "These stations are only interested to make as much money as possible in a short time, because they know that they will not survive long-term", is the opinion of another owner.

But the problem of weak advertising revenue is also homemade. Very few stations have professional staff explicitly assigned to this department. The payment is almost always based on an average 20 percent commission. This is hardly a sufficient salary and many of these marketing agents work freelance and have a second job.

Consequently we have the owner and/or the entire staff collecting advertisements. This structure does also not allow a proactive approach. In many cases business clients have to come to the stations. Most stations also have no diversified concepts including different forms of commercials in different slots, e.g. before or after the news.

This structure is also reflected in the use of sponsors as potential sources of revenue. The examples of Radio Tema in Ferizaj/Uroševac and Radio Dodona in Gillogovc/Glogovac show that this can be very effective and profitable. Both stations are using sponsoring not only as a source of revenue; they also use it as

²⁵ See "The Role of KFOR" p24, p45

an effective tool to improve relations between audience and station. Radio Dodona for instance found a company willing to contribute twelve tons of flour to be distributed to people in need. The same was done with Christmas presents the station had received from business partners.

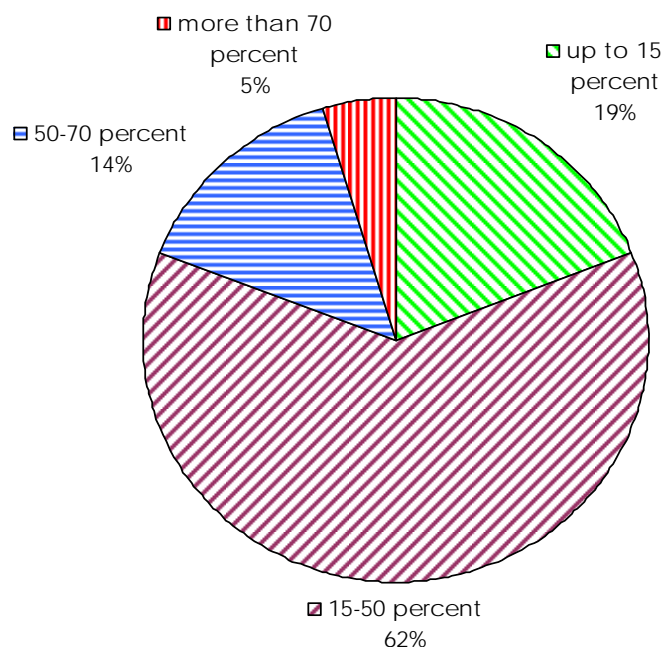
The Role of KFOR

KFOR is the main external international contributor to the budget of local electronic media in Kosovo. Three of the four Multinational Brigades support a total of 26 radio- and TV stations²⁶. Section II of this report shows in detail the regional and budgetary structure.

Prior to the March 2004 events, KFOR spent approximately €23,643 per month.²⁷ The payments are based on long-term agreements for the purchase of airtime. The programming includes mainly informative programs, talk-shows and so-called KFOR messages. All of them promote the role of KFOR as well as goals and objectives of the military force. Each of the stations broadcast an average of four to eight hours per month for an hourly fee of up to €200. The compensation for TV stations runs several times that amount.

The smaller broadcasters, especially, survive only because of these payments. Interviews and field visits have revealed that some of the broadcasters are very closely affiliated and have lost their independent status. Thus a market-driven or through re-licensing regulated consolidation will be difficult to achieve in the some areas under these circumstances. Prior to the March 2004 violence KFOR planned to reduce the support significantly and in early 2005 the structure underwent a redesign.

The chart shows to which extend broadcasters cover their budget with KFOR payments.



²⁶ As of 4/2005

²⁷ 13 broadcasters contracted by KFOR cover up to 50 percent of their budget with this contribution; one station lives almost exclusively of this support. (2/2005)

It is important to understand that KFOR's interest is of a purely military nature. All activities are part of Psychological Operations (PSYOPS), conducted with almost no financial or conceptual transparency. Media development including sustainability and overall professional standards are hardly part of KFOR's goals and objectives. An exception is the German involvement with a magazine for TV Prizreni. The responsible soldiers, journalists by profession, have provided intensive 3-month in-house training for all departments.

Donor Support

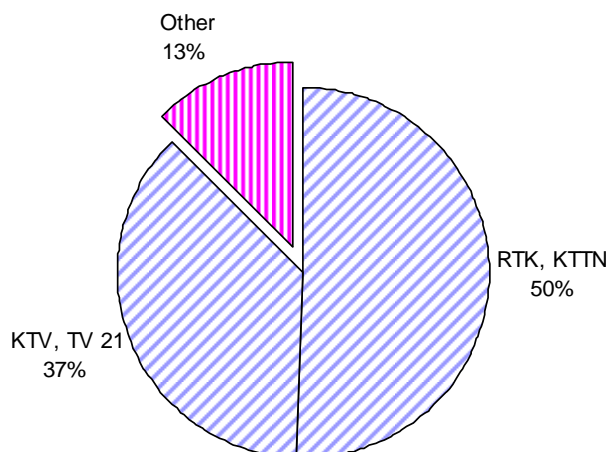
Since 1998 Kosovo media have received extensive support by the international community. The estimate of financial assistance between 1998 and 2004 adds up to more than 36 million Euros. The majority went into the Public Service Broadcaster RTK, KTTN²⁸, and the two private Kosovo-wide Broadcasters KTV and TV 21.

Significant donor support at the local level went into the Kosma network (260.000 Euro) and a small number of radio and TV stations. Kosma was provided with transmitters to link the stations as well as generators to ensure operation during power cuts.

The unstable electricity situation is, according to all broadcasters, their biggest problem. The mostly unpredictable and unannounced power cuts do not only make regular broadcasting according to program schemes impossible, they also cause major damage to transmitters and computers. The repair is a major financial burden.

*Estimated Donor Assistance 1998-2004*²⁹

The vast majority went into infrastructure, equipment, technical assistance and training. The segment "Other" sums up support for print media, minority stations and programming as well as development of a legal framework.



The most important donors have been the US and Japanese Governments. Whereas the support for the public sector has decreased since 2002, the support for the private Kosovo-wide broadcasters, minority programming, and minority

²⁸ KTTN is a nongovernmental, nonprofit organization, managed by an executive director and technical staff. It is overseen by a board representing Kosovo wide broadcasters. KTTN covers approximately 80% of Kosovo. The organization was until 2004 to 95percent financed by USAID. Fees were introduced to cover the costs, although sustainability is according to the US AID Kosovo Media Assessment, March 2004, still an issue.

²⁹ The table shows only the estimated support of the main donors. The figures are based on the respective exchange rates in May 2005. A number of smaller organizations have contributed additional support through programming, equipment or production costs. Sources: OSCE, USAID

media has remained, but seems to be not well coordinated. Even stations without a license have been supported. Respondents reported also double funding on several occasions. Stations had submitted proposals to a number of donors and accepted donations from more than one side.

These incidents reflect the “cargo cult” mentality³⁰ which has seen many media outlets develop. Several respondents expressed their expectations even their entitlement to financial support. Projects were developed with the sole purpose of attracting donors. Many program components financed by the international community and well received by the audience end with the external support.

Some stations have developed their skills in requesting donor support to sheer perfection as the example of a Mitrovica based TV station shows. The manager approached the international community in 2005 with a plan for close cooperation with a minority broadcasters connected with a request of several 10.000 Euro and additional equipment. In the case of rejection he assumed indirectly that the international community would be against this multi-ethnic cooperation. Research revealed that the story was basically made up and the minority partner had no intention to corporate in the announced way. According to them the initiator described the proposal as a way to obtain significant donor support.

Programming and Audience Acceptance

Although there are no extensive surveys or tools on the acceptance of programming available, interviews with citizens, local representatives of all parties and the civil society as well as with municipal press officers revealed severe deficits.

Respondents in almost all municipalities criticize a lack of news and informative programs available in their communities. While managers blame this primarily on the economic situation, it is obvious that this is only part of the problem. Opportunities to produce programs serving the public interest remain untested and underutilized, often rejected outright in the first place. This applies to reporting on local issues, as well as cooperation with NGO’s as representatives of the civil society.

Some owners specifically made the point that they are not interested in such programs. “We are not interested in politics, therefore we have decided to play only music”, said one owner. As a result, programming consists of juke box programs and “wishes and greetings”. In some cases, these program schemes include rebroadcasts of international stations such Voice of America, Radio Free Europe, Deutsche Welle, and the BBC.

Among the stations broadcasting their own news and informative programs, a clear editorial policy could hardly be identified during this study. The selection of news and design is primarily in the hands of individuals and is not manifested in a conceptual structure. There are very few exceptions, such as Radio Kontakt Plus in Mitrovicë/Mitrovica.

In addition to quantity, respondents also criticize the quality of programs. Municipal Information Officers, doing the press work for the municipalities complained widely about professional standards and poor understanding of the role of media. One municipality even went so far as to hire a journalist and buy a camera, so now it is the municipality producing the news. The programs are given

³⁰ An almost religious belief on the part of recipients in the inevitability and rightness of foreign assistance, or “cargo” – the expression originating in the South Pacific in World War II.

to the local TV station which broadcasts the 15 to 20 minute program, charging for the airtime but not mentioning the source.

Despite this obvious lack of acceptance claim most broadcasters that they are the most listened station in their region, some rank themselves right behind the Kosovo-wide stations. Managers are referring to dubious assessments. Fact is, that Kosovo lacks on a local level reliable professional instruments to analyze the acceptance which has also an impact on program design and advertising business. Some stations try to compensate this by homemade surveys which provide hardly more than an indication.

Some stations have complained about the selective attitude individual municipalities have when it comes to providing information to different media. TV Men in Gjilan/Gnjilane is even involved in a legal dispute with the municipality. But the overall rating of access to information on a municipal level is good there.

Complaints were also recorded regarding insufficient cooperation of police forces (Kosovo Police Service as well as with UNMIK Police). The first mainly related to geographic structures.³¹

A number of respondents complained also about the increasing influence religion seem to have on stations. Some radio and TV stations are said to broadcast prayers during religious holidays instead of news. Without professional monitoring it is not possible to confirm or evaluate the extent of these complaints.

The deficits in journalistic quality were also reflected in the reporting during the March riots 2004. Whereas the reporting on the violence was investigated thoroughly by the TMC, the day to day reporting was aired mostly unmonitored. Action is only taken after complaints.

In 2004 the OSCE had a basic monitoring operation on the ground. The reports revealed significant deficits in news. Protocol journalism³² was widely observed, local issues were not covered.

Minority Language Programming

The survey has revealed significant reluctance to broadcast minority programs, especially in areas which were heavily affected by ethnic violence during the war. This includes the Dukagjini valley³³ in the west as well as the Drenica region northwest of Prishtina/Pristina.

Most of the existing minority programming is donor driven and connected with significant financial contributions, covering often the key expenses of the station if this is not already done by KFOR. International program managers on the ground are not too optimistic that stations continue with these efforts once the donor support ceases. Numerous examples over the last years prove the skepticism.

The majority of managers, referring to the March 2004 crises, believe that such programs would harm tremendously their already weak position. "We will lose our audience and as a result income from wishes and greetings as well as marketing

³¹ Spokespersons are only located in the main municipalities. Local police officers are not allowed to give any information to the media.

³² Unreflective reporting on events with little investigation..

³³ Including Pec/Peja, Gjakovë/Đakovica, Orahovac/Rahovec

business”, wrapped up one owner the concerns. Additionally, statements were made such as “nobody has ever approached us”. “We are an Albanian station, therefore we broadcast only Albanian programs” was often recorded during interviews with owners.

More responsive are broadcasters in the East of Kosovo. Stations in the Gjilan/Gnjilane region including Kamenica/Kamenica showed more openness to minority programming. However even here it became obvious that most broadcasters are more interested in raising donor support than in developing sustained and sustainable minority programming.

Serbian stations in the southern part of Kosovo pointed to the lack of freedom of movement as a reason for limited programming. In the divided town of Orahovac/Rahovec, respondents mentioned this as a major obstacle when it comes to reporting on municipal issues.

External Affiliation and Influence

Although almost none of the respondents claimed direct political affiliation or orientation of their local electronic media, it was made clear that there are limits to independent reporting.³⁴ “Journalists and owners are very well aware of where their support comes from”, stated one representative of the civil society. “Even if media are generally free to report critically, they can not and will not violate some unwritten rules. You can for example criticize municipal employees but never the mayor.” This obedience to authority was mentioned in particular for some of the former municipality owned stations. “They are still behaving in the old way, as they did in the old days”.

In the course of the survey respondents also pointed out, that political parties have a strong interests in the Kosovo wide broadcasters. This includes the Public Service Broadcaster RTK and Koha TV (KTV), where also strong personal interests were mentioned. “Since the owner of KTV has become a prominent political figure the TV clearly reports in favor of him”, said one respondent. This opinion was given in a number of other interviews. Though Kosovo-wide broadcasters were not included in the survey it is recommended to further investigate this.

Copyright

The law on copyright has not yet been promulgated in Kosovo. However, with signing their licenses have broadcasters committed themselves also to respect certain guidelines introduced by the Temporary Media Commissioner. According to this regulation, based on international law and practice, are broadcasters obliged to respect intellectual property.³⁵

Although these guidelines state very clearly that broadcasters must have “proper copyright clearances and permissions for any and all programming (including music via CD and other means) prior to the airing” it is still common practice at TV stations to broadcast pirate movies. The TMC has issued a number of warnings to revoke the license of stations which have aired movies illegally. Some were

³⁴ Nevertheless in one case it seems to be obvious that municipalities know how to ensure that their political interests are reflected in media as such. The municipal information officers are not only members of a ruling party; they are also newspaper-correspondents.

³⁵ TMC License Provisions on Copyright: Guidelines for Compliance, Pristina, 1 January 2004. http://www.imc-ko.org/IMG/pdf/TMC_Guidelines_on_Copyright_01_Jan_04_ENG.pdf

also fined, but often put on six month probation. However, it seems as if the TMC is only aware of the tip of the iceberg.

Stations consider these movies vital. TV Iliria in Ferizaj/Uroševac, which was known to have the latest movies, ceased the illegal broadcasting. The station had to take a major cut in advertising business when it replaced the films with legal but comparatively unattractive programming. The owner is wealthy enough to balance the loss. Other broadcasters are in a less fortunate position.

Some directors are trying to circumvent the regulations by signing contracts with local DVD rental places. Either they pay a very small amount for the rental period or they cut a deal, offering airtime for a movie – without acknowledging that this practice is illegal. A number of broadcasters also claim difficulties obtaining licenses for copyright protected material.

A future fee for copyright is seen by most TV stations as a major economic threat. Managers of radio stations expressed similar concerns. They have already received letters from a Serbia based agency claiming to be legally entitled to collect fees. Representatives of other “agencies” have showed up in person.

Employment

The employment situation reflects the overall status of the broadcasting sector. Salaries, especially in the minority stations are below the estimated average income. More than half of the stations don't have contracts with their employees; payment of pension contributions is not common practice.³⁶

Contracts

Only 42 percent or a total of 48 stations have contracts – mostly written but some oral - with their employees. Whereas most contracts include a job description, only very few list the rights of employees and the cancellation period for both sides.

Salary Structure and its Impact

In comparison to Kosovo's average monthly income of around €200³⁷, the average minimum salary of journalists is about €145. (Only editors in chief and directors make significantly more in the majority of stations.) As a result there is suffering, especially in the economic weaker stations, and high turnover. Journalism and media work are often seen only as temporary employment. Asked what she likes about working as journalist at a local radio station, the young woman answered: “I like to listen to music and talk to people on the phone”.

More than half of the respondents working for broadcasters said they would leave the station for any better paid position. Managers and owners confirmed this. Most of the employees who left stations do not work in journalism at all anymore. As a consequence the stations have to train new, inexperienced staff all over again; and a significant part of the efforts by the international community to build journalistic capacity is lost.

³⁶ The detailed analysis is available in the section “Data Analysis Local Broadcast Sector” pp36.

³⁷ The latest official figure published by the Statistical Office of Kosovo for the period of June 2002 till May 2003 is 192,68 €/month average salary. According to the same statistics the average consumption is 375 €/month. (http://www.sok-kosovo.org/pdf/general/Kosovo_in_figures_2004.pdf)

TV Herc is only one example reflecting the situation in many stations. Three Albanian journalists underwent for donor financed minority programming extensive training. Only few months later the station faced financial difficulties, salary payments were delayed for months and the employees left, most likely never working for media again. Two went abroad; the third went to work for KFOR. In order to continue the programming with additional donor money, new journalists had to be trained.

The analysis of wages revealed also a major difference between Kosovo-Albanian and Serbian broadcasters. The average minimum salary of journalists at Kosovo-Albanian Stations is 70 to 120 percent higher than for equivalent positions at Serbian stations. Two broadcasters are not paying salaries at all. Others pay depending on the revenue situation. Some workers haven't received their salaries in months.

The multi-ethnic stations are paying significantly higher salaries despite their complaints about the economic situation. Here the donor assistance phenomenon becomes obvious.

The survey reveals also that radio stations in Prishtina/Pristina are paying the highest salaries of all regions.

Conclusions

Conclusions

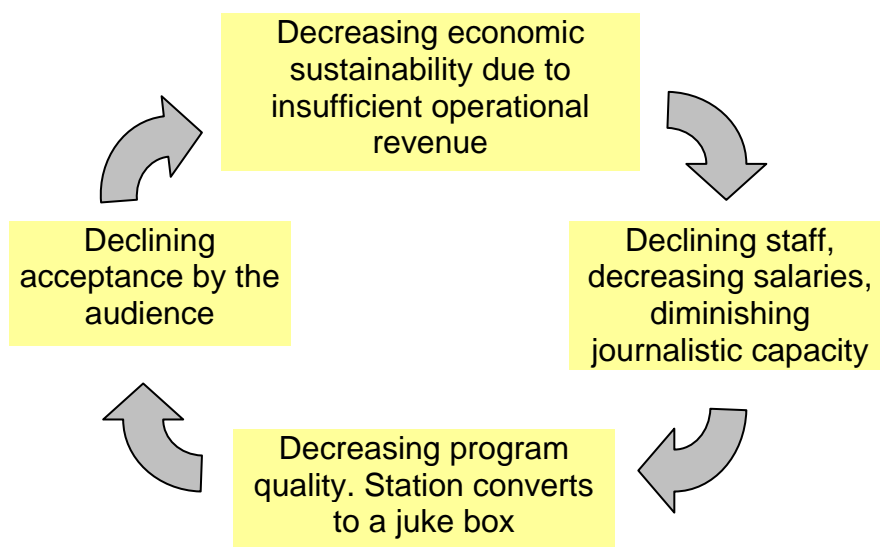
"The more media the more democracy and human rights" sounds like a perfect concept. But if these media can't finance themselves, the whole idea goes down like an overloaded hot air balloon collapsing in high altitude, unable to fulfill its role in the Public Sphere. And what remains at the end of the day are scattered pieces of limping broadcasters trying to survive. Some of them still receive vital assistance from the international community: infusions, trying to strengthen the patient – although some donors don't seem to have the right recipe. In the case of KFOR it's almost nothing but oxygen without long-term impact. It appears to be hardly more than life support. Once turned off, the patient dies.

This survey shows how devastated the situation of local electronic broadcasters in Kosovo is. Neither can the Kosovo economy support such a high number of radio and TV stations, nor are the majority of stations skilled enough to serve their audience profitably and according to professional standards.

The negative impact of real or potential external influence on programming must also be considered severe. The vast majority of broadcasters do not fulfill their intended roles to:

- Provide impartial and independent information to the public;
- Support of rebuilding a functioning civil society;
- Help to reconcile different ethnic groups, especially Albanian and Serb Kosovars.

The reasons for the situation must be sought in the history but also in an incoherent strategy to build a vivid sustainable broadcasting sector, including a sustainable body of qualified journalists. The international community, including the regulatory body, has due to lacking monitoring of local electronic media only limited knowledge of processes and programs. The process triggered by these facts is a vicious circle turning into a precipitous downward spiral precipitating inevitable closure of broadcasters.



This consolidation, which has already started, does not apply to a limited number of stations. It applies to the sector as a whole with few exceptions, in leading to an overall negative impact on the function of media.

Consequently the majority of local electronic media will not be able to meet the challenges ahead as formulated in the Kosovo Standard Implementation Plan.³⁸

Recommendations

The findings of this analysis lead to a two fold set of recommendations to ensure equity, fairness and diversity in the local electronic media sector serving the public interest:

- **A strong regulatory institution** (IMC) which must be politically and otherwise balanced. The IMC should have permanent excellent background information in order to provide the necessary guidance and ensure compliance with licenses.
- **Professional Media** operating on high journalistic and editorial standards with a solid sustainable economic and managerial basis.

In detail these sets of recommendations comprise of:

- **A re-licensing process aiming on a consolidated sustainable media landscape; emphasizing on foremost qualitative criteria**

Although a consolidation of the local broadcast sector is inevitable it is not recommended to leave this process solely to market forces. The concept of “survival of the financially fittest” will not leave the most qualified stations alive or serve the public interest. In the opposite: such a strategy would place at high risk the valuable broadcasters that are trying to serve their communities according to international standards. They are the ones employing journalists, trying to establish quality programming.

³⁸ See “History and Background” pp13

The projected re-licensing process under the institution of the Independent Media Commissioner (IMC) provides an opportunity to direct this process by developing adequately balanced criteria. These criteria should take professional and programming standards seriously into account.

- **A monitoring unit to ensure license compliance and standards**

The evaluation of programming standards requires a professional monitoring unit.³⁹ It could not only be an essential component during the re-licensing process, it would also serve long-term to ensure that broadcasters comply with their license and the application on which this permit is based. The current complaint driven system can serve this purpose only to a limited extent. It misses a number of other aspects as for example political bias or religious extremism during regular programming.

Additionally could be assumed based on previous experience with monitoring, that such a component would foster significantly self-censorship of media.

The proposed monitoring unit could, but not necessarily must, be attached to the IMC. The alternative to a branch of the IMC is to establish it as an independent institution. The example of Memo89 in Slovakia, established with the support of the National Democratic Institute (NDI), and other similar organizations prove that such an enterprise could be self sustainable.

Worthy of consideration might be to attach this monitoring institution to the Kosovo Media Institute (KMI). This would incorporate the expertise of the KMI and contribute to its long-term sustainability.

- **Local Public Service Broadcasters controlled by independent multi-ethnic broadcasting councils to foster real multi-ethnic broadcasting where applicable; partly financed with the subscription fee to reduce vulnerability of external influence.**

The general idea of Local Public Service Broadcasters – although with different background and partly different financial concept - has been already successfully implemented in Montenegro. Considering the plain rejection of such programming by most radios and TVs in Kosovo this model, as part of the re-licensing process - would enable sustainable minority/multiethnic broadcasting.

These stations should be controlled by an independent multi-ethnic broadcasting council. Journalists and management, comprising all applicable ethnic groups, should form one team.

To grant a certain percentage of the subscription fee, initially only foreseen to finance the Public Service Broadcaster RTK, to these broadcasters would not only guarantee financial sustainability it would also reduce social, economic and political pressure from local societies and

³⁹ Currently there are several monitoring components ongoing, including those of the OSCE and UNMIK. But none is focusing on local electronic media.

improve independence of journalists and programming.

However, minority programming should in general concentrate only on regions which are already open for reconciliation. All other attempts will most likely fail.

- **A strong mid career educational institution for journalists to build a sustainable professional core group of journalists and managers.**

To counter weaknesses in management, editorial boards and other departments it is recommended to establish a coherent, systematic strategy aiming on professional standards for a selected core group of stations/managers/employees who would be trained over an adequate period of time. The Kosovo Media Institute could be a valuable component in this attempt.

- The experience from the past shows that previous short-term training concepts have reached a high number of participants without having significant impact on the overall standard. The curriculum and the timeframe should be adjusted to the work flow of stations.

Worth of consideration would be also to include contractual commitments of participants to stay with their employer for a certain period after completion of the training.

- **A strong self-regulatory body comprising of all broadcasters to raise standards and to serve as a potential co-regulator counterpart for the IMC and a focal point for Donors, but also to minimize the theoretic risk and impact of a politically or otherwise unbalanced IMC.**

The regulatory system of media in Kosovo follows in general the example of most European countries. Print media will be self-regulated by a press council, broadcasters controlled by a statutory regulator as defined in the respective law⁴⁰ for the Independent Media Commission. However, recent developments in mass communications are leading more and more to co-regulatory systems not only for Public Service Broadcasters but also for the commercial sector. In these models the media industry takes over certain responsibilities as a self-regulatory institution, aiming on media violence, protection of minors, advertising, codes of conduct, etc. Examples are Germany, Italy, Sweden and others. In Canada the regulation of content is fully self-regulated through the Canadian Broadcast Standards Council.

Although the overall status of at least the local broadcast sector raises questions about the potential effectiveness of such self-/co-regulatory attempts in Kosovo, it could still raise the overall standards of media, fostering self responsibility and professionalism. It could also provide a certain balance the theoretic risk and impact of a politically or otherwise imbalanced IMC. Additionally it could serve as a focal point for donors. It should be assessed if and to which extend AMPEK, the Association of Electronic Media in Kosovo, could serve in this function.

⁴⁰ http://www.assembly-kosova.org/common/docs/ligjet/2005_02-L15_en.pdf

- **Sustainable Capacity Building**

To counter the “cargo cult” mentality of stations and to develop a culture aiming at sustainability it is also recommended that a certain contribution be requested from local counterparts. This applies especially to training, in the form of a commitment to implement special workshops as well as to donations of equipment and other support.

Annex 1: Broadcasters in Kosovo



This map includes all operational broadcasters and broadcasters which are, according to the TMC, will receive a license in the near future.

Annex 2: Networks

Kosma

Radio Antena	Radio Impuls	Radio M
Radio As	Radio K	Radio Max
Radio Borzani	Radio Kamenica	Radio Mix
Radio Bubamara	Radio Kim	Radio Mir
Radio Focus	Radio Kiss	Radio Sočanica
Radio Gorazdevac	Radio Klokot	Radio Spektar
Radio Herc	Radio Kompas	Radio Tri Srca
Radio Hit Laser	Radio Kontakt Plus	Radio Vitez
Radio Index	Radio Kosovska Mitrovica	

8/2005

CERPIK

Radio K	Radio Kontakt Plus	Radio Vala Rinore
Radio Kamenica	Radio Mitrovica	Radio Yeni Doenem
Radio Kent FM	Radio Peja	

8/2005

Network of Local TV Stations

TV Prizreni	TV Syri	TV Dukagjini
TV Men	TV Iliria	TV Mitrovica

Data Analysis

Local Broadcast Sector

Assessment of Local Electronic Media in Kosovo

Graphic Analysis of Key Results
5/2005, update 8/2005

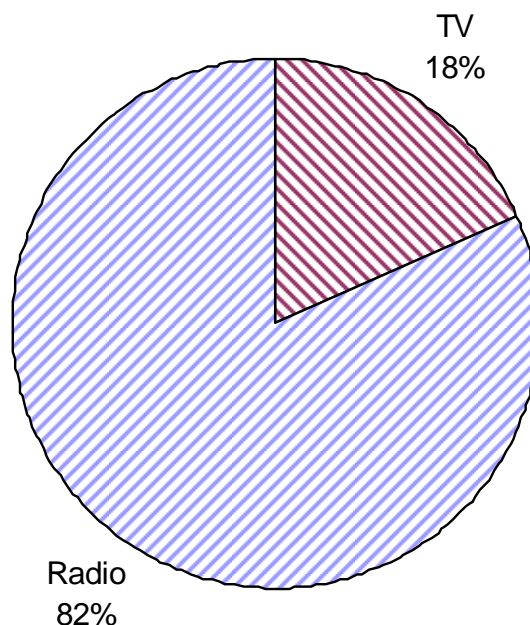
Disclaimer:

All data are based on information provided by the individual broadcasters and through a review of existing documentation including license applications, licenses, etc.

Basic Data

General Structure of Electronic Media

As of 15. August 2005 are 93 Radio Channels and 21 TV Channels operating in Kosovo. 112 out of these 114 broadcasters are licensed by the Temporary Media Commissioner (TMC). 3 operate under a mutual agreement with the TMC but are expected to receive their license soon. One additional local TV station was licensed in August 2005 and is expected to go on air by October. At least 4 more stations are expected to be licensed in the next months.



Structure of Ownership

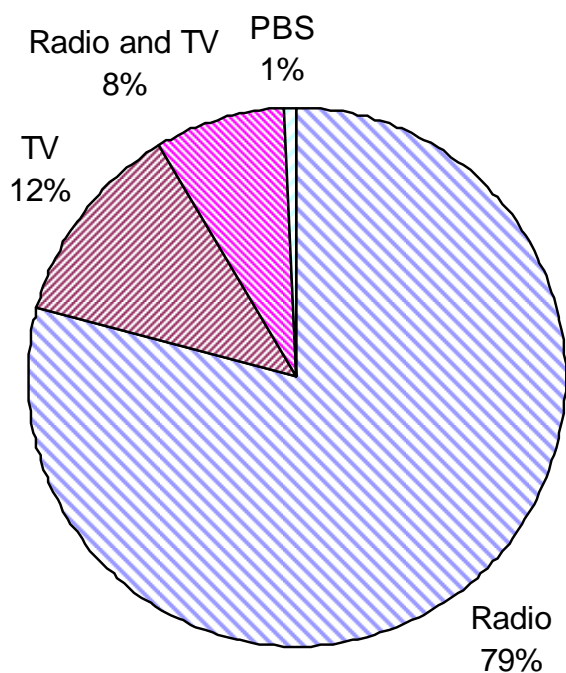
These broadcasters are owned by 105 private companies or nongovernmental organizations, 3 are part of the Public Broadcasting Service (PBS) RTK.

Private companies/NGOs

Radio	84
TV	13
Radio and TV	8

PBS (RTK)

Radio	2
TV	1

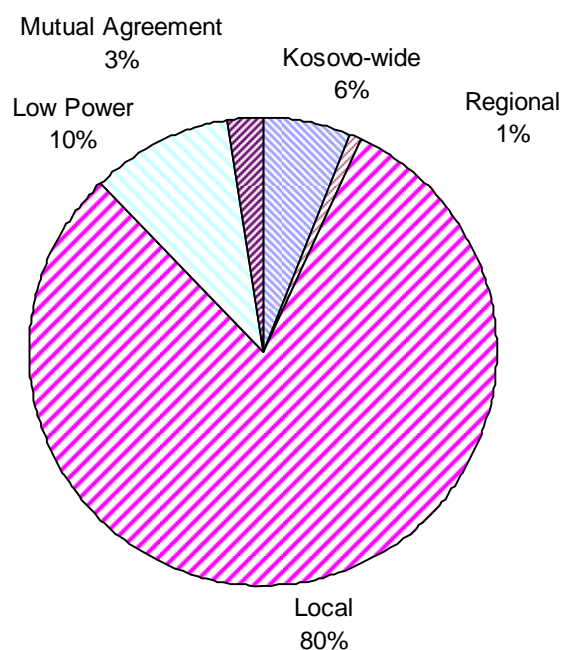


License Structure

Broadcasters licensed by the Temporary Media Commissioner

Absolute Numbers

<i>Kosovo-wide</i>	7
<i>Regional</i>	1
<i>Local</i>	93
<i>Low Power</i>	11
<i>Mutual Agreement</i> ⁴¹	3

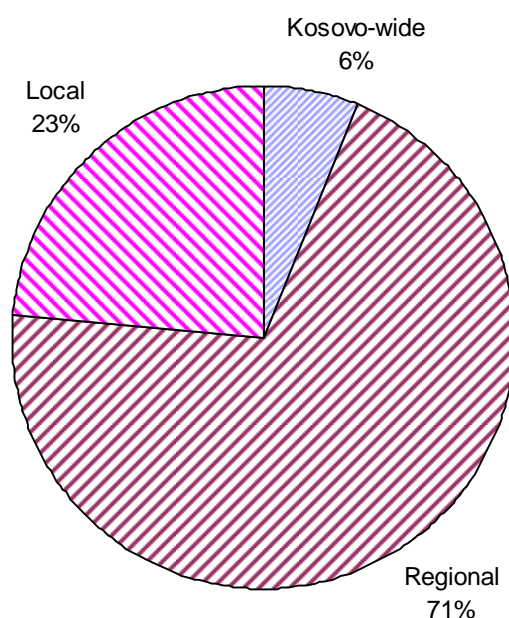


Footprint

According to the licenses issued, most broadcasters are supposed to have local coverage. However, according to information provided by station management the majority consider themselves clearly regional due to topographic conditions, transmitter power and transmitter location.

Absolute Numbers

<i>Kosovo-wide</i>	7
<i>Regional</i>	81
<i>Local</i>	27



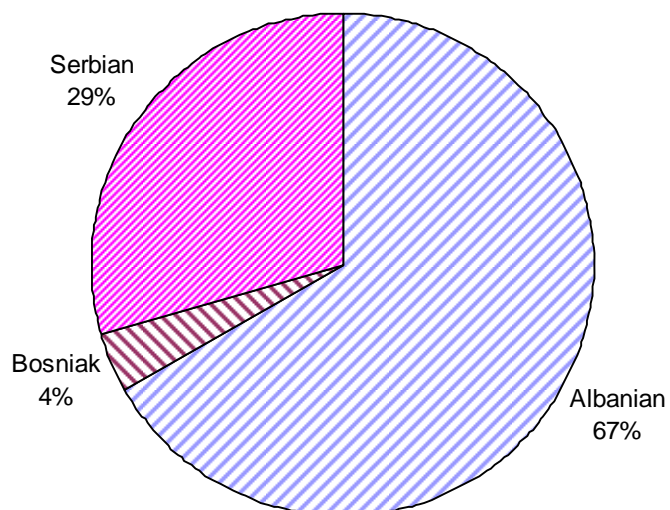
⁴¹ Three broadcasters were permitted to operate unlicensed but on the basis of a mutual agreement till they receive later 2005 a low power license. In the meantime they were obliged to follow the same rules and regulations as licensed competitors.

Ownership by Ethnic Affiliation

The decision-makers (owner/directors) have the following ethnic affiliation:

Absolute Numbers

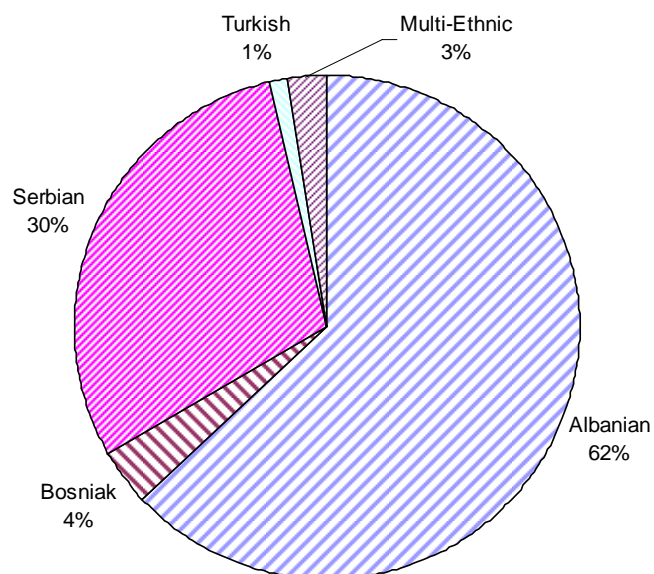
Albanian	68
Bosniak	4
Serbian	30
Turkish	2



Language Structure

Absolute Numbers

Albanian	73
Bosniak	4
Serbian	34
Turkish	1
Multi-Ethnic ⁴²	3

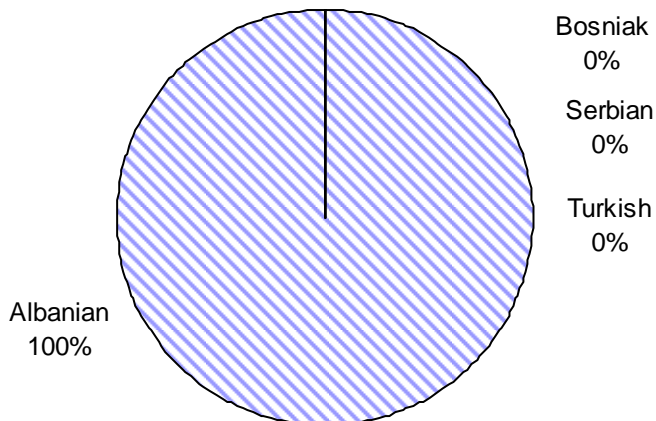


⁴² Multi-ethnic are only station considered with editorials of different ethnicities, working in close cooperation. Not considered being multi-ethnic are stations with small elements of minority-programming or editorials with parallel structures and no interaction.

Ethnic Structure based on Footprint

Kosovo Wide Coverage

Seven TV and Radio stations have Kosovo-wide coverage⁴³. Their general programming is dominantly in Albanian. The Public Service Broadcaster RTK has an obligation to broadcast also in minority languages (Serbian, Bosnian, Turkish, and Roma). The private stations do not have any minority programming at this point.⁴⁴

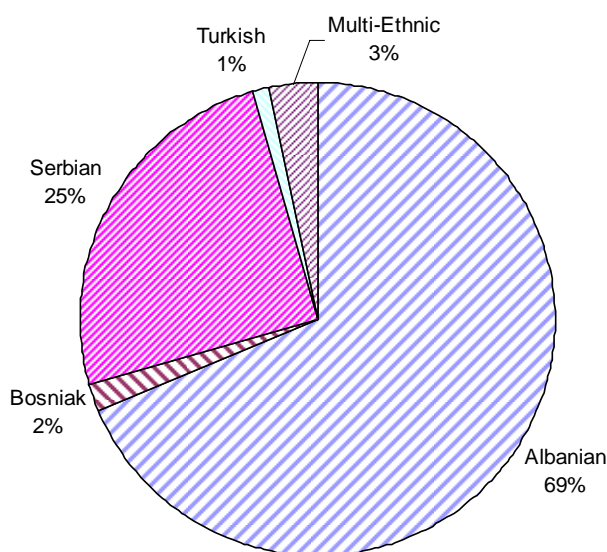


Regional Coverage

Of 82 broadcasters considering themselves regional are:

Absolute Numbers

Albanian	63
Bosniak	2
Serbian	23
Turkish	1
Multi-ethnic	3



⁴³ “Kosovo Wide Coverage” does not mean that these stations actually cover the entire Kosovo. Due to topographic limitations significant areas are still remaining without coverage of central electronic media (app. 20 percent).

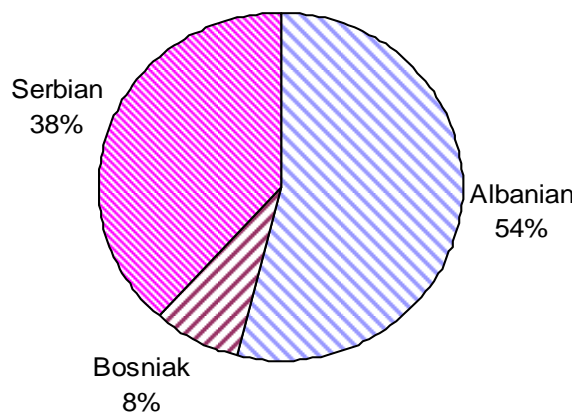
⁴⁴ A Kosovo-wide Serbian channel as part of RTK was under discussion, but was not pursued due to financial reasons. However, more important than such a channel seems to be a strong Kosma network with an emphasis on local news and a certain window of unified programming to improve the overall quality and sustainability of the individual stations.

Local Coverage

27 respondents in the survey indicated local coverage for their stations. This includes also low power stations.

Absolute Numbers

Albanian	15
Bosniak	2
Serbian	10
Turkish	0



Registration of Broadcasters

Under UNMIK regulations broadcasters have two registration options: As a non-governmental organization (NGO) or as a registered business. A number chose, according to their management the NGO status due to initial tax advantages.

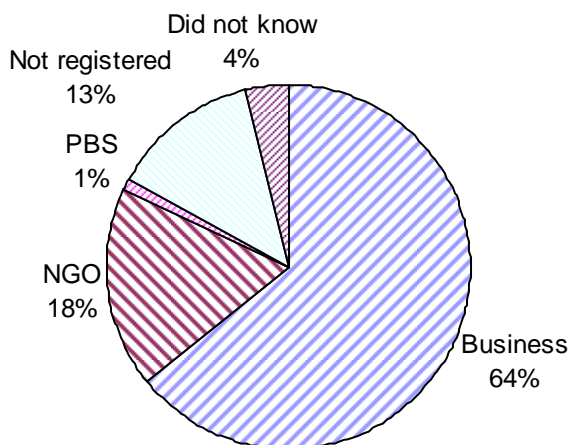
A number of respondents said that their station is registered as a "personal business" without being able to show any documentation. These broadcasters are included with those who are not registered at all.

Only the Prishtina/Pristina based broadcaster RTK has Public Service status. Local stations do legally not have the option to register as such. Former municipality owned stations had to be transferred into either businesses or NGOs.

Broadcasters are registered as follows:

Absolute Numbers

Business	68
NGO	19
PBS	1
Not registered	14
Did not know	4



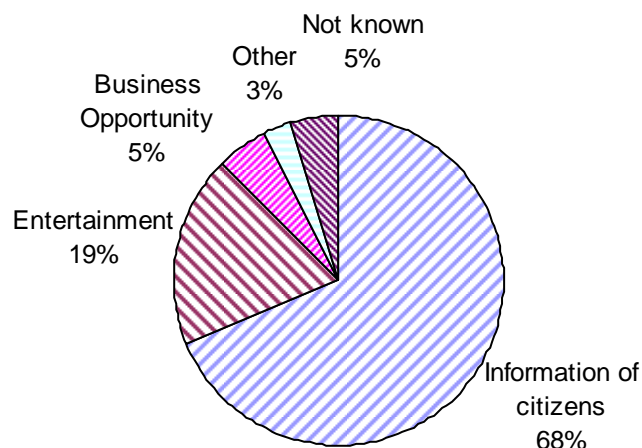
Motivation for Broadcasting

The vast majority of owners and managers said that “information for citizens” is their primary motivation for operating a radio and/or TV station. The percentage is even higher based on licensed applications on file with the TMC. The motivation and the resulting character of the broadcaster were one criterion for granting the permit.

Motivation is categorized as follows:

Absolute Numbers

<i>Information of citizens</i>	72
<i>Entertainment</i>	20
<i>Business Opportunity</i>	5
<i>Other</i>	3
<i>Not known</i>	5



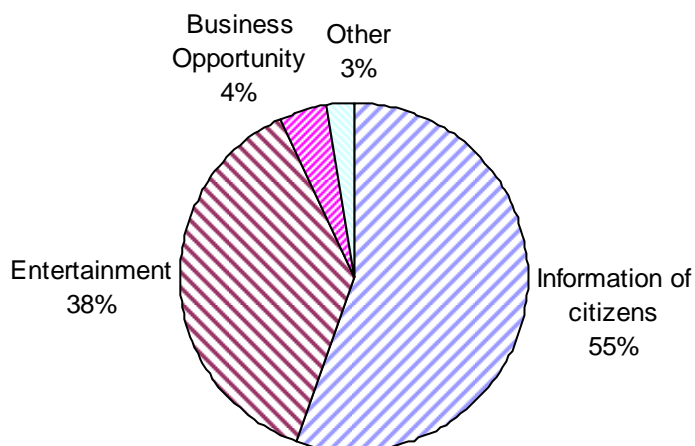
Character of Broadcasters

The analysis of the character of broadcasters is based on the emission of local, regional and world news (the latter is mainly provided by stations like Voice of America, BBC and others. The chart shows that the number of pure entertainment stations is significantly higher as indicated by the statements of stations. A number of interviews with citizens and other respondents representing civil society reveal that the percentage of pure entertainment stations that provide no useful information in a professional manner is still benevolent.

Broadcasters are categorized as follows:

Absolute Numbers

<i>Information of citizens</i>	63
<i>Entertainment</i>	43
<i>Business Opportunity</i>	5
<i>Other</i>	3



Economic Situation

The analysis of the economic situation was conducted for broadcasters having a local or low power frequency (including the three broadcasters that are not licensed but operate with low power transmitters). The only exception is Radio Dukagjini which is a Kosovo-wide broadcaster but operates financially as a local broadcaster.

Sustainability

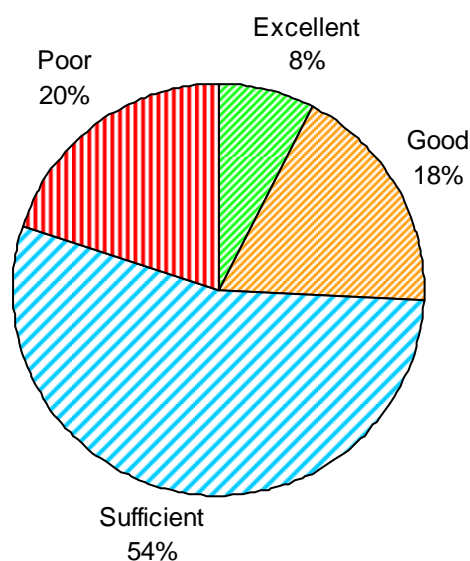
This rating⁴⁵ of economic sustainability is based on the proportion of revenue and costs; the degree to which broadcasters depend on external financial resources (donors, KFOR, own financial contributions and remittent) in relation to their regular income.

It is also based on the assumption that broadcasters have to survive long-term under market conditions without external financial support.

Not considered are future costs like copyright and license fees. It must be expected that these costs shift the weight dramatically to the "poor" sector.

Rating of Broadcasters:

<i>Excellent</i>	8
<i>Good</i>	19
<i>Sufficient</i>	57
<i>Poor</i>	21

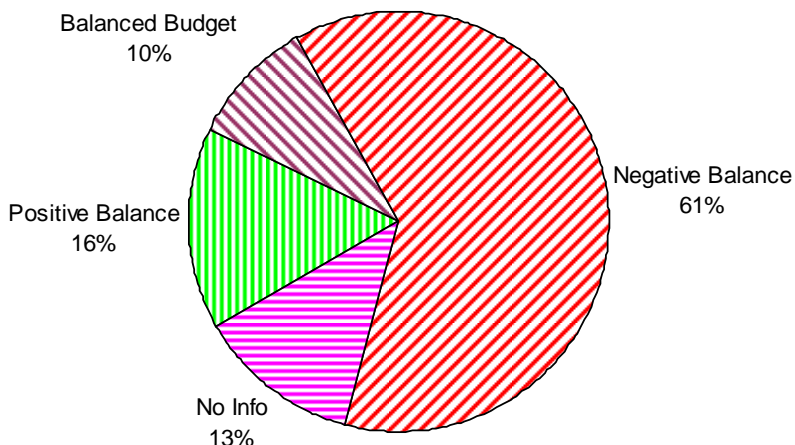


⁴⁵ Excellent=needs no external resources; Good=needs very little external resources and can compensate cuts; Sufficient =needs external resources but has developed concepts to compensate cuts; Poor=cannot survive without external support over a long-term period

Budget Evaluation

Budget Evaluation based on operational revenue

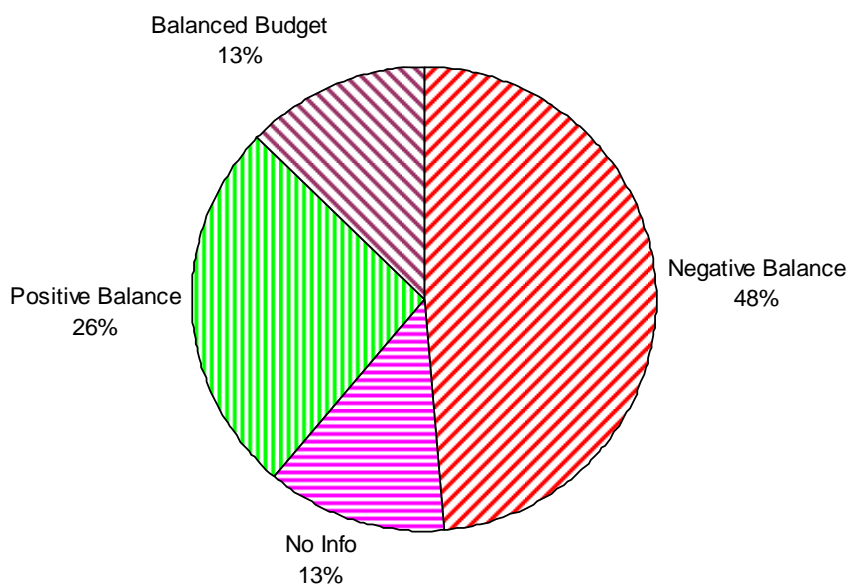
The analysis of broadcaster budgets is based on operational revenue and reveals that almost two thirds do not balance expenditures and revenue.



Budget Evaluation including KFOR

KFOR with its significant long-term payments for airtime must be considered as the main external contributor to the operational costs of broadcasters in Kosovo. The amounts paid monthly to the contracted stations allow an additional 13 percent to reach a balanced budget or even profitability. (Compared to the analysis based on operational revenue).

No figures are available for the impact of the support by Serbian stakeholders such as RTS, which are according to several sources, heavily subsidizing Serbian broadcasters through the payments of salaries and other costs.



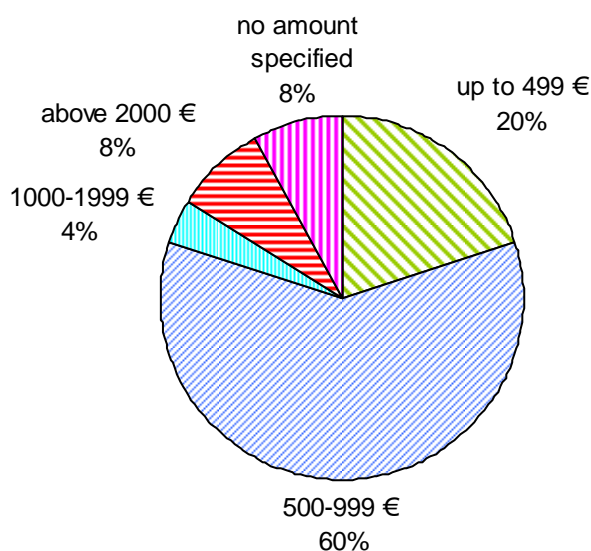
KFOR

KFOR Payments/Month (2/2005)

Under long-term contracts with KFOR broadcasters receive a certain amount per hour of airtime. The average airtime is between three and four hours per month.
⁴⁶

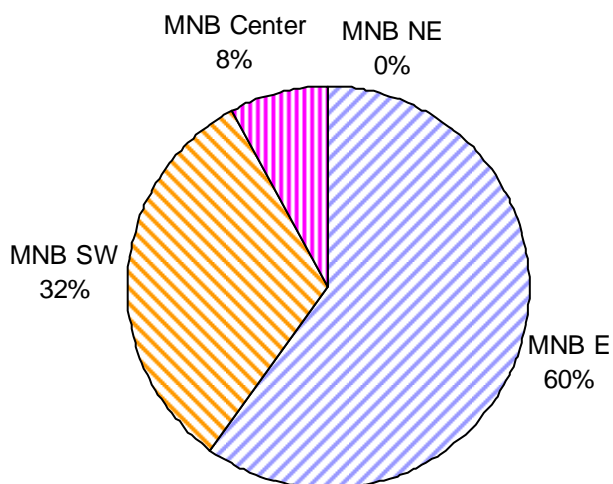
KFOR Contributions

<i>up to 499 Euro</i>	<i>5</i>
<i>500-999 Euro</i>	<i>15</i>
<i>1000-1999 Euro</i>	<i>1</i>
<i>above 2000 Euro</i>	<i>2</i>
<i>no amount specified</i>	<i>2</i>



KFOR Payments by Regions

The regional analysis⁴⁷ reveals that the strongest engagement with local media is in the "Area of Responsibility" of the Multinational Brigade East.



<i>MNB East</i>	<i>(OO Gjilan/Gnjilane, OO Strpce/Shterpce)</i>	<i>15</i>
<i>MNB South-West</i>	<i>(OO Prizren/Prizren, OO Peja/Pec)</i>	<i>8</i>
<i>MNB Center</i>	<i>(OO Prishtina/Pristina)</i>	<i>2</i>
<i>MNB North-East</i>	<i>(OO Mitrovicë/Mitrovica)</i>	<i>0</i>

⁴⁶ All figures are solely based on data provided by stations. KFOR does not reveal any information regarding their media engagement.

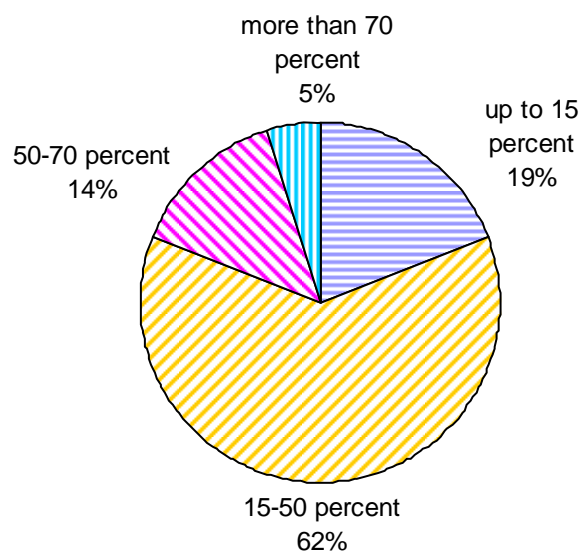
⁴⁷ The Area of Responsibility (AOR) of the Multinational Brigades is equivalent to the AOR of these OSCE Offices.

KFOR Payments in Relation to Budgets

Two thirds of broadcasters under contract with KFOR cover up to 50 percent of their budget with this contribution. 5 percent are covering their operational costs almost exclusively with this support.

Absolute Numbers

<i>up to 15%</i>	4
<i>15-50%</i>	13
<i>50-70%</i>	3
<i>more than 70%</i>	1



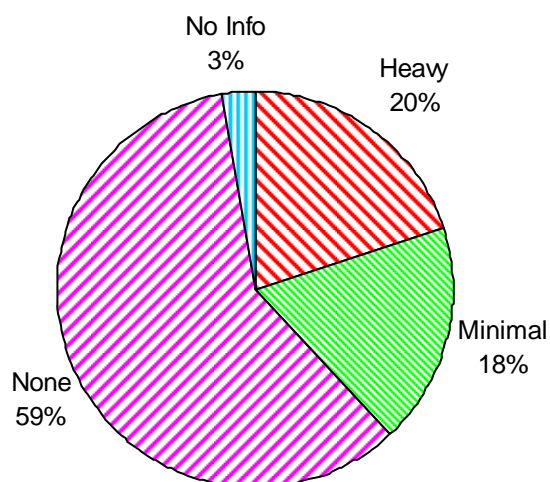
Donor Dependency

Donor Support Absolute

The analysis of donor support shows that 35% of stations rely on international assistance either through direct financial contributions, projects or donations of equipment. Some stations admit openly that they would not be able to survive without this external support.

Absolute Numbers

<i>Heavy</i>	21
<i>Minimal</i>	19
<i>None</i>	62
<i>No Info</i>	3

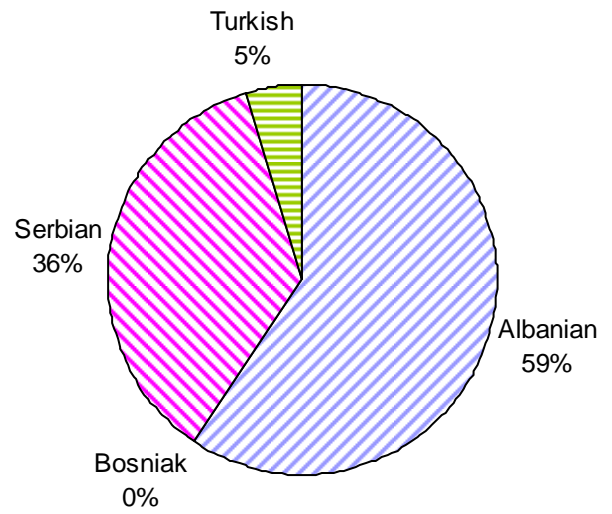


Ethnic Analysis Donor Support

The graph shows the structure of support by ethnicities.

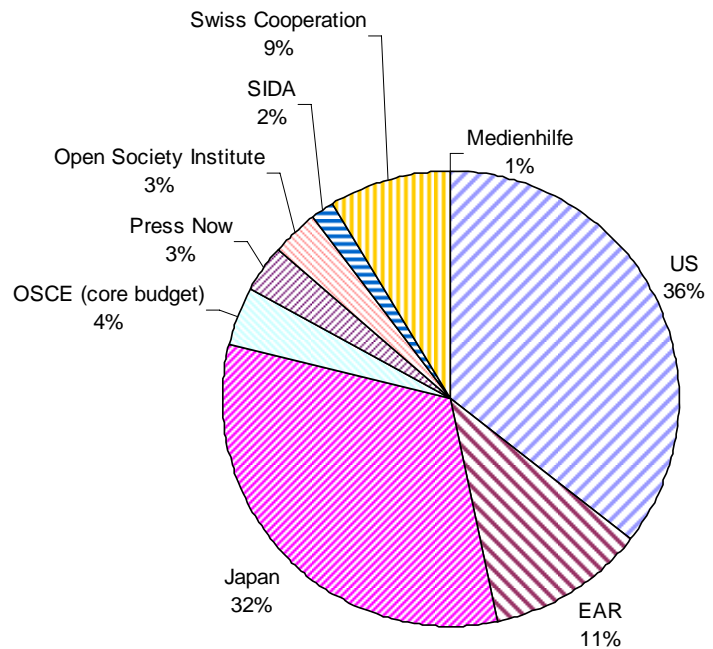
Absolute Numbers

Albanian	25
Bosniak	0
Serbian	15
Turkish	2



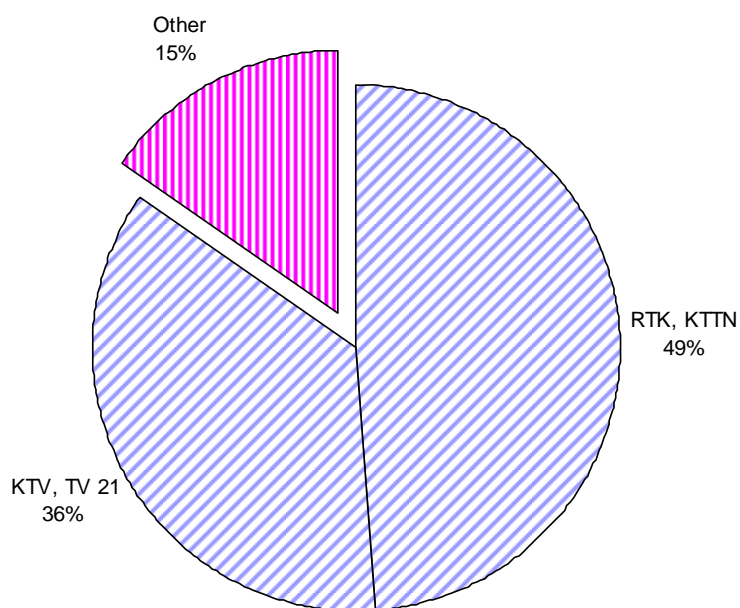
Assistance by Country/Donor

The chart shows the involvement of the individual countries/donors. Not all organizations publish their figures in detail. Therefore and this chart only provide a general overview



Donor Support by Sector

The graph shows the main donor support by sectors according to the figures a total of 85% went into Kosovo-wide broadcasters and Kosovo-wide infrastructure. "Other" sums up support for local electronic media, print media, legislation etc.



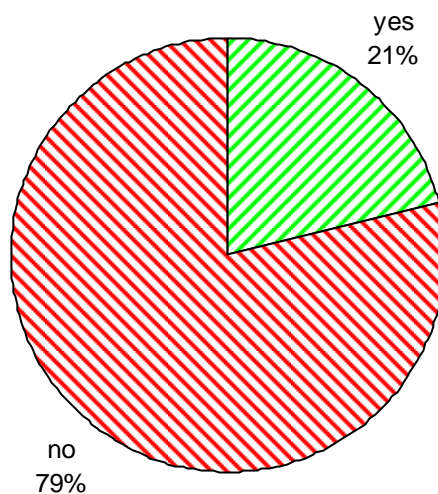
Business Structure

Management Background of Key Personnel

The analysis of management skills shows severe deficits. Almost 80% of key personnel (owners, directors, etc.) had no business experience prior to their engagement in media.

Absolute Numbers

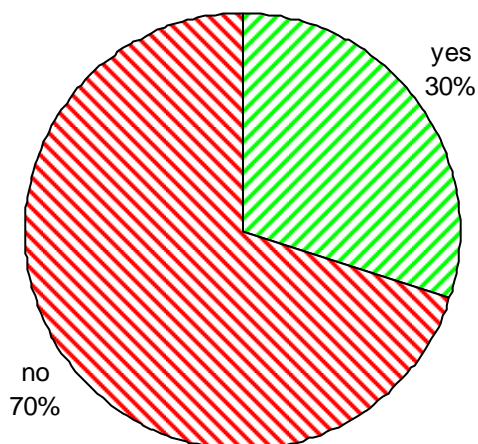
Yes 24
No 90



Business Plan

A main indicator for professional management is the existence of a business plan. Only one third of the stations are using this financial planning tool.

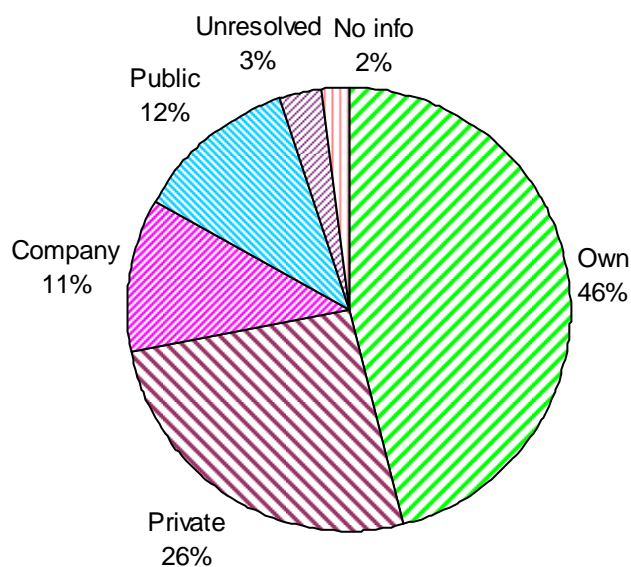
A number of managers stated that poor economy does not allow for the development or implementation of a business plan.



Ownership of Premises

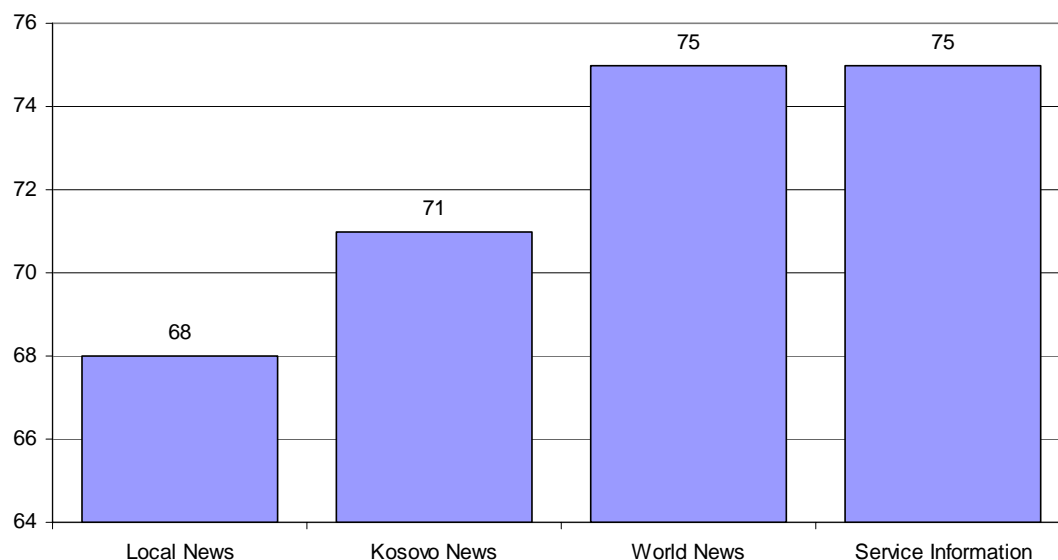
Ownership of premises and the connected costs is generally seen as a risk factor for economic sustainability. This assessment has revealed that this issue poses only a very small risk to station owners in Kosovo. Almost half of the station owners also own the studio space. The ownership of 94% of studios and offices is resolved. In only 3 percent of the cases is the ownership question unresolved with broadcasters not having proper contracts or even paying no rent.

A far greater risk for sustainability, especially for the Serbian stations in the southern part of Kosovo, are electricity and phone bills – neither of which are paid in a majority of cases. A number of managers admit that the unpaid invoices total several thousand Euro and that this could pose a very serious risk. As a result, most Serbian stations in the south do not have a working telephone landline and consequently access to the internet and other sources of information.



Programming

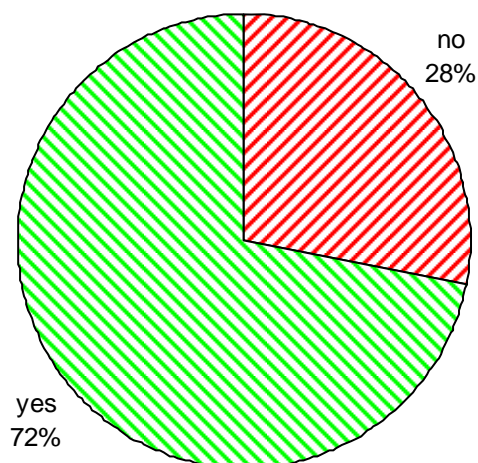
News



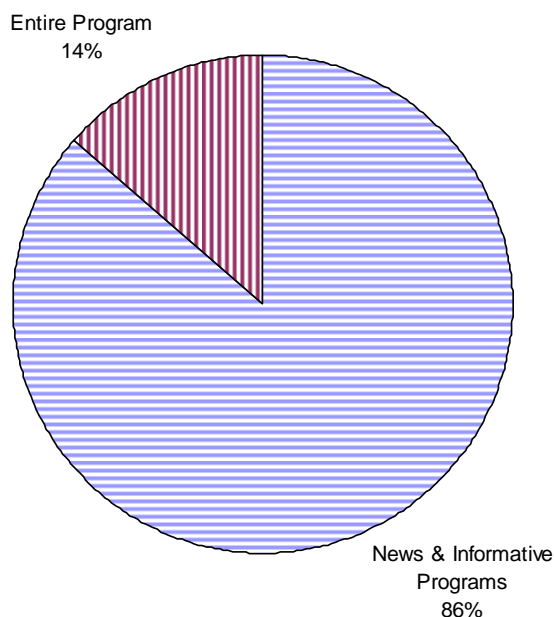
This graph shows how many stations are broadcasting news and service information (utilities, bus schedules, etc.) World and Kosovo News are mainly provided by external stations like Deutsche Welle, Voice of America and others (see rebroadcast). Local news is mainly covered by flash news. More sophisticated stations have additional daily chronicles.

Archive of Programs

Almost a third of the broadcasters do not archive any programs. The majority gives as reasons technical problems as well as the fact that they have no news or informative programs.



Out of the 72 percent of the stations keeping an archive only 14% archive the entire program. The remaining 86 percent claim that they archive news and informative programs. In many cases they only keep the manuscripts but not the original broadcast.

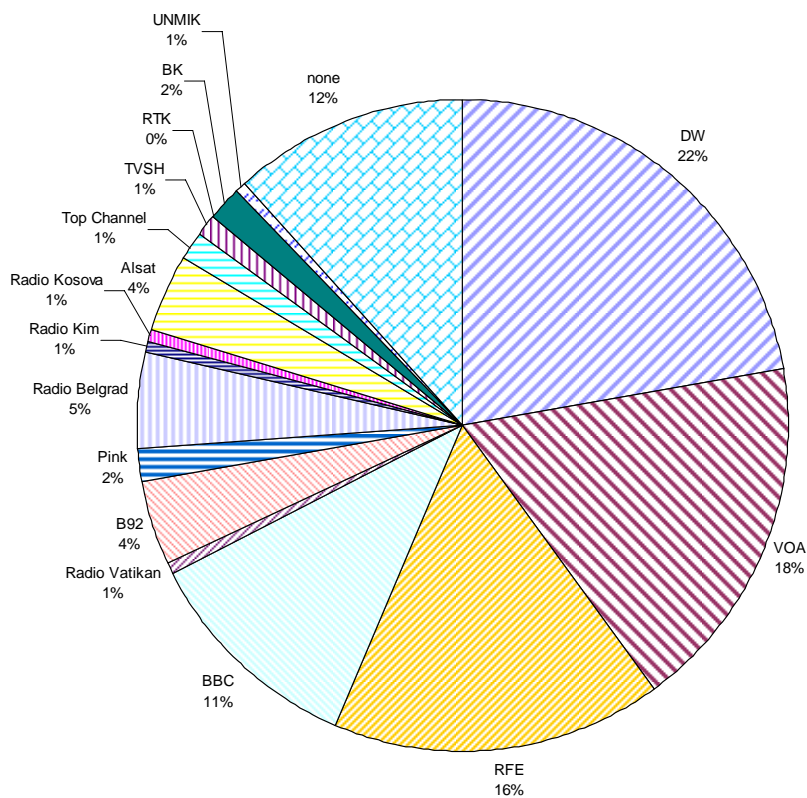


Rebroadcast

Broadcasters from outside Kosovo represent especially for the smaller stations the only source of news and informative programming due to lack of own staff and resources. These programs are free and local broadcasters have normally contracts and receive satellite equipment to pick up the signal.

Absolute Numbers

DW	38
VOA	31
RFE	28
BBC	19
Radio Vatikan	1
RTS	1
B92	7
Pink	3
Radio Belgrad	7
Radio Kim	1
Radio Kosova	1
Alsat	7
Top Channel	2
TVSH	2
RTK	1
BK	3
UNMIK	1
none	20



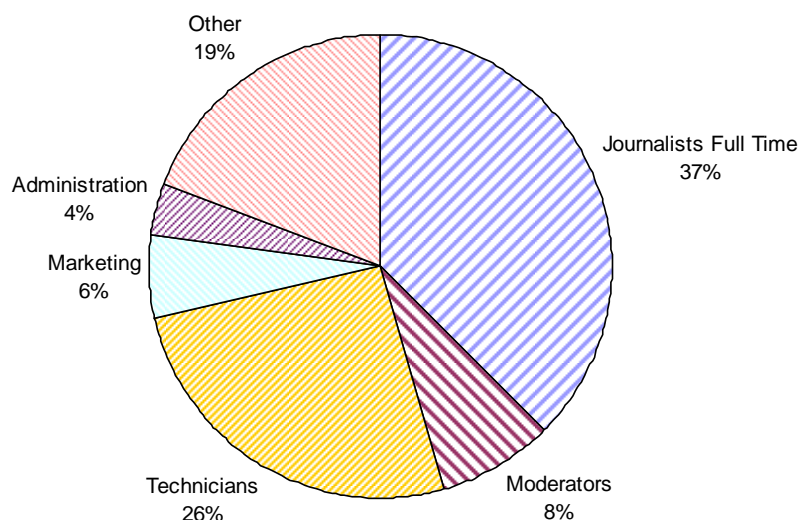
Employment

Employment Structure

The chart shows the overall employment structure at local broadcasters. Especially in smaller stations the employees must do all jobs. The section “Other” lists additional employees (free-lancers, guards, etc.)

Absolute Numbers

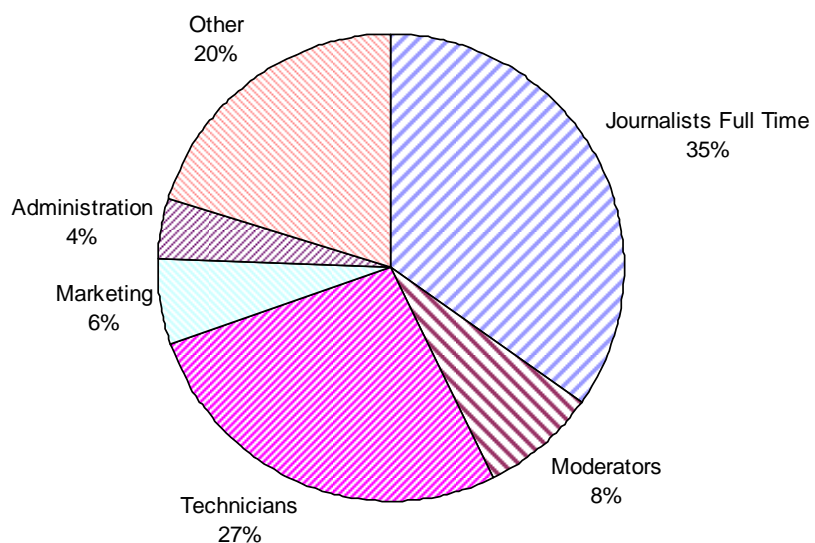
<i>Journalists Full Time</i>	<i>358</i>
<i>Moderators</i>	<i>78</i>
<i>Technicians</i>	<i>249</i>
<i>Marketing</i>	<i>54</i>
<i>Administration</i>	<i>36</i>
<i>Other</i>	<i>183</i>



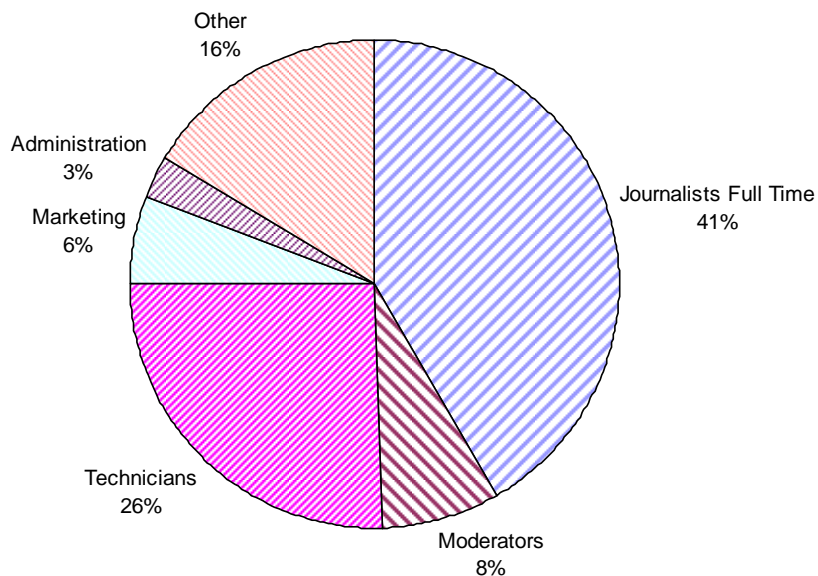
Employment Structure of Albanian Broadcasters

Absolute Numbers

<i>Journalists Full Time</i>	<i>208</i>
<i>Moderators</i>	<i>48</i>
<i>Technicians</i>	<i>161</i>
<i>Marketing</i>	<i>35</i>
<i>Administration</i>	<i>25</i>
<i>Other</i>	<i>101</i>



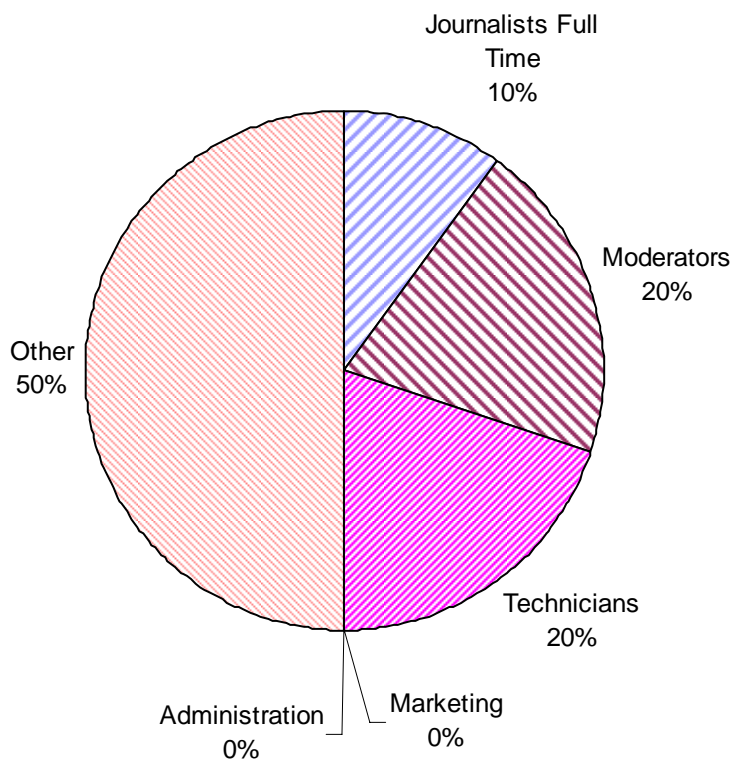
Employment Structure of Serbian Broadcasters



Absolute Numbers

Journalists Full Time	120
Moderators	22
Technicians	74
Marketing	17
Administration	8
Other	47

Employment Structure of Bosniak Broadcasters



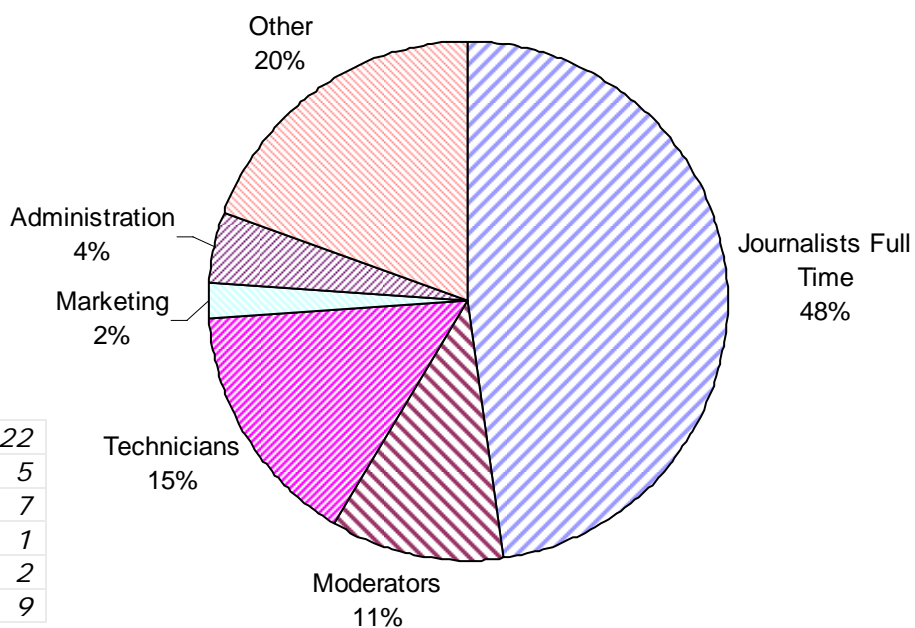
Absolute Numbers

Journalists Full Time	1
Moderators	2
Technicians	2
Marketing	0
Administration	0
Other	5

Employment Structure of Multi-Ethnic Broadcasters

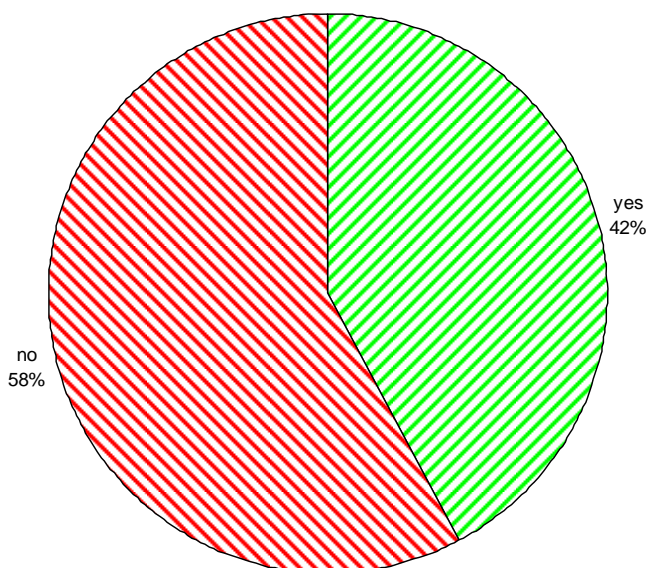
Absolute Numbers

<i>Journalists Full Time</i>	22
<i>Moderators</i>	5
<i>Technicians</i>	7
<i>Marketing</i>	1
<i>Administration</i>	2
<i>Other</i>	9



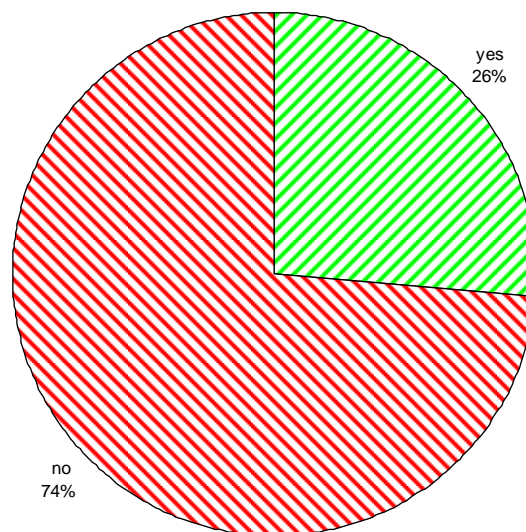
Contracts for Employees

The existence of contracts with employees is considered a main indicator for the professionalism of stations as well as for the employment conditions in general. Especially at the Serb broadcasters are agreements often based on oral commitments. This does not only leave the journalists and other employees without any protection, it poses also a certain risk for the employer and the sustainability of the work force.



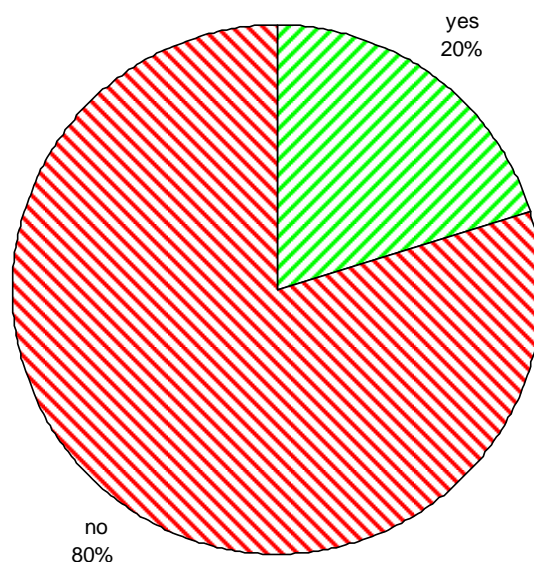
Payment of Pension Contributions

Payment of pension contributions is considered to be another key indicator for professionalism and sustainability. The survey reveals that not even a third of the broadcasters pay these contributions. The majority of broadcasters blame either the poor economic situation or – in the case of Serbian stations – the missing legal framework for not paying pension contributions.



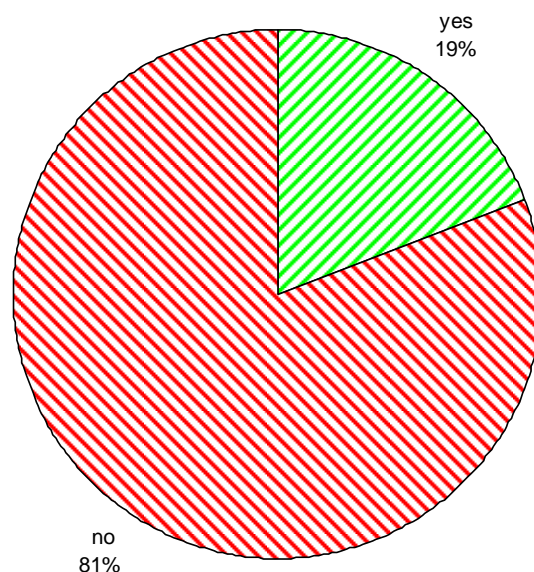
Payment of Overtime

The majority of broadcasters claim that they are unable to reimburse overtime. However, most of them try to limit the extra hours by organizing tasks and responsibilities accordingly.



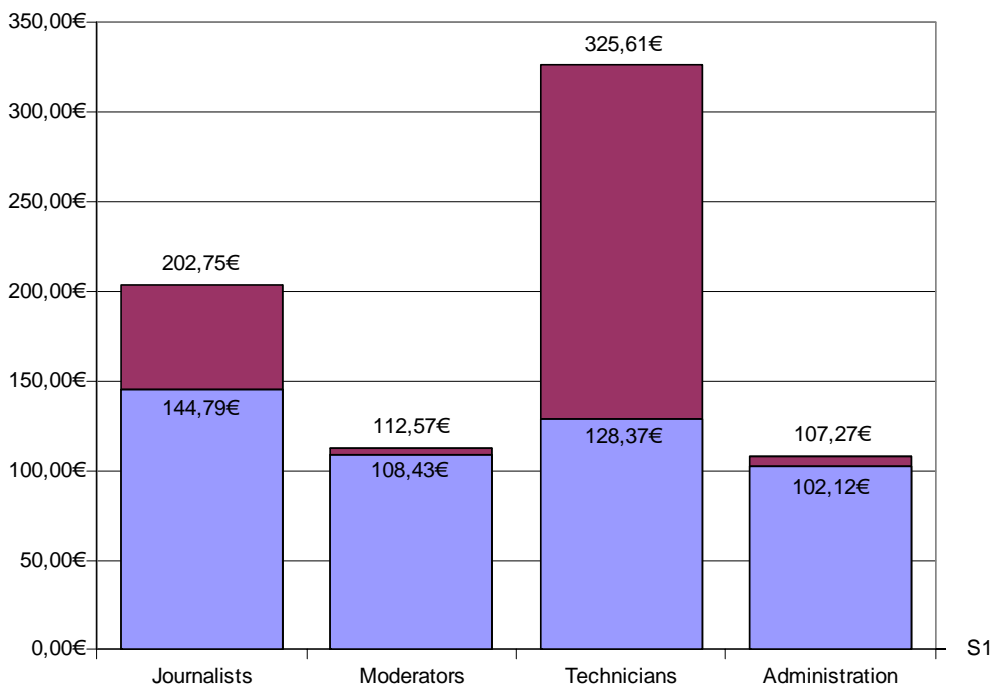
Payment of Additional Benefits

Almost a fifth of the stations pay additional benefits like meals or transport.



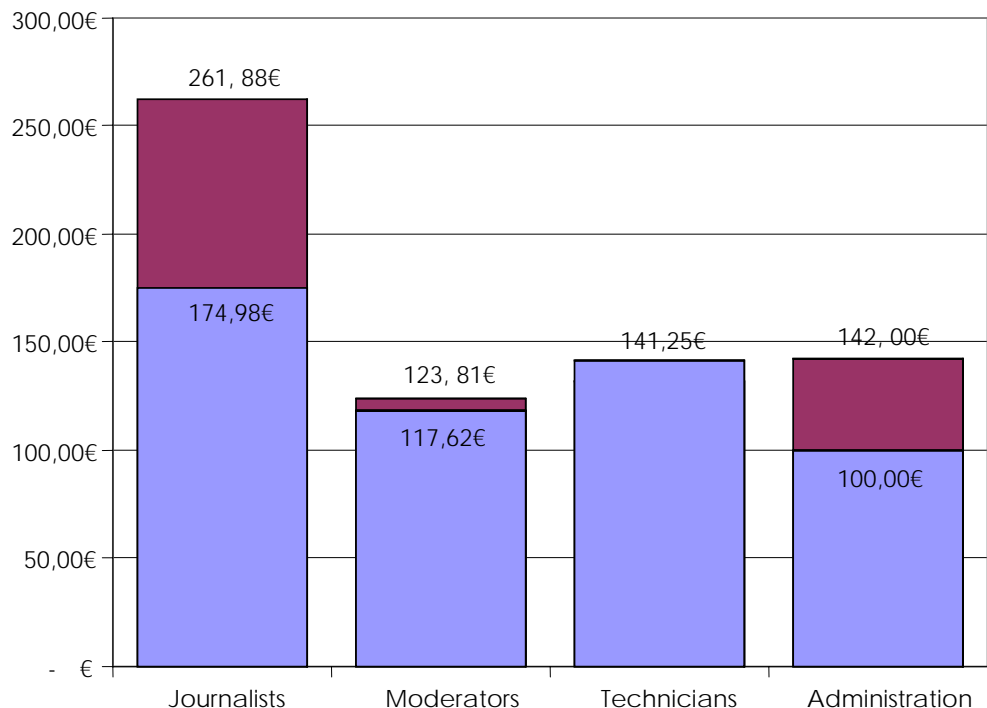
Salary Structure

Salary Structure by Employees Kosovo-wide



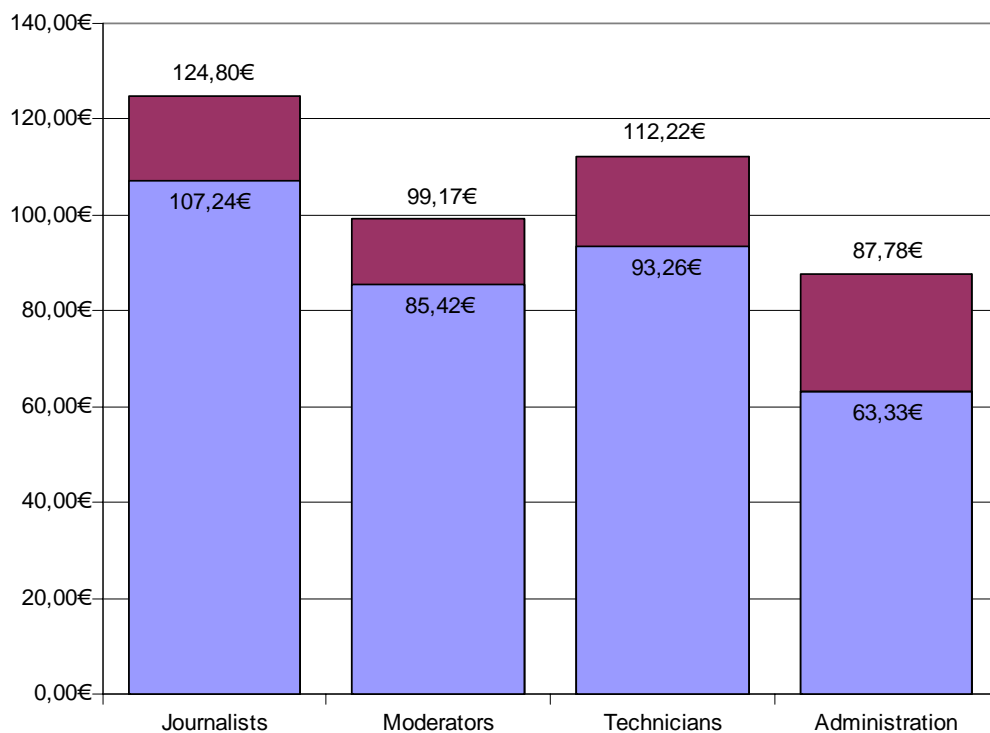
The graph shows the average income of employees fitting into a regular salary structure. The top salaries show mainly salaries for editors in chief and directors of stations. Some technicians at TV stations are also paid extraordinary well compared to their colleagues at radio stations.

Salary Structure by Employees of Albanian Stations

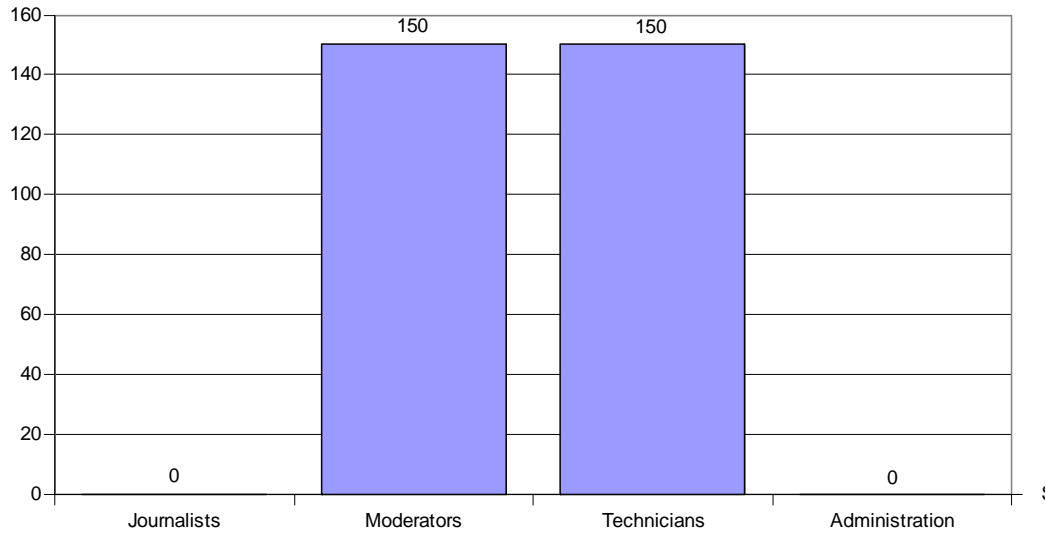


The graph shows the average income of employees fitting into a regular salary structure. The top salaries show mainly salaries for editors in chief and directors of stations. Salaries of TV stations are normally higher than the ones of radio stations.

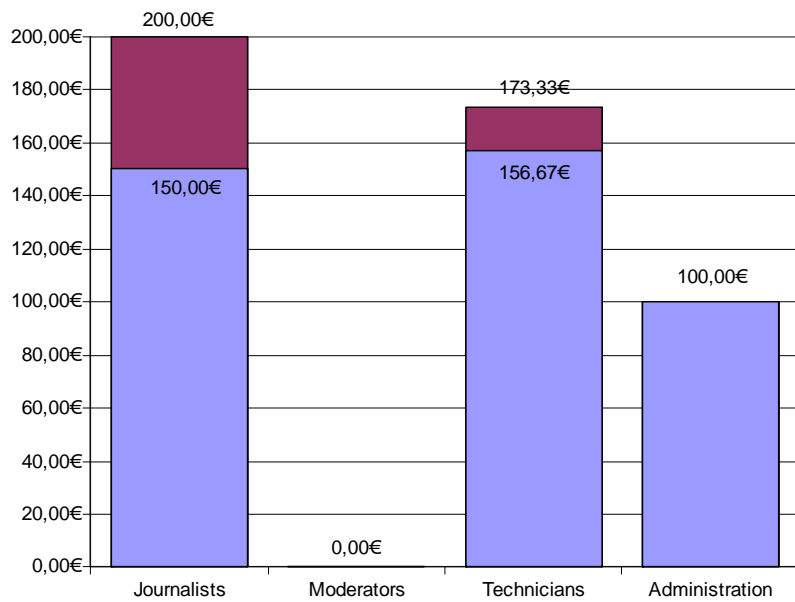
Salary Structure by Employees of Serbian Stations



Salary Structure by Employees of Bosniak Stations

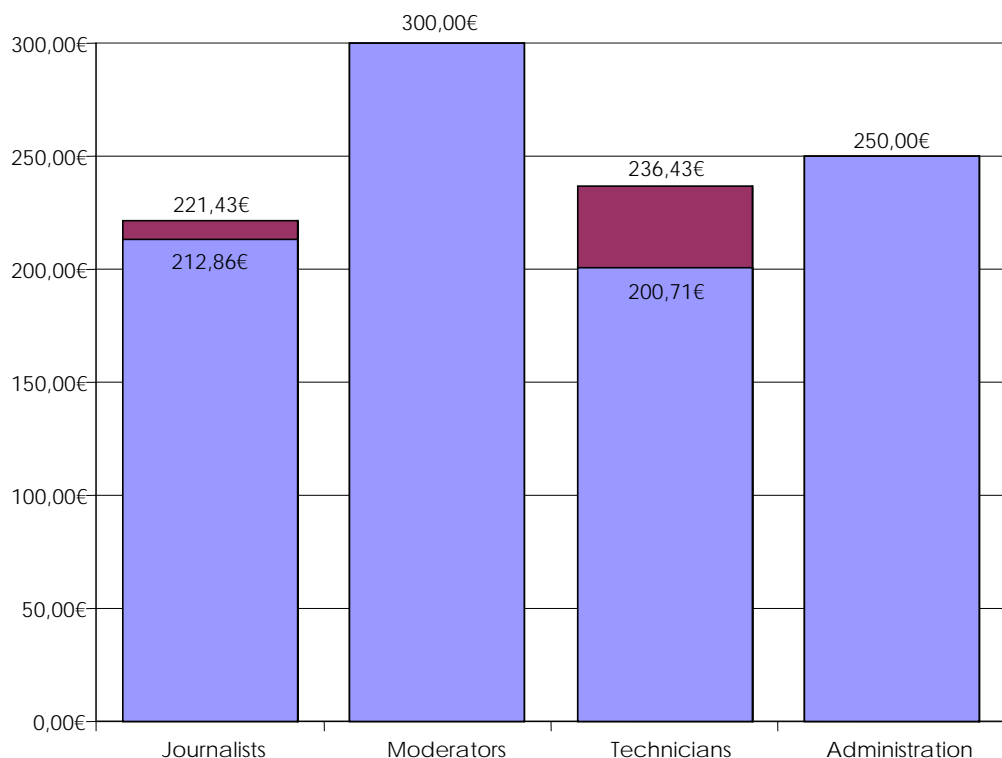


Salary Structure by Employees of Multi-Ethnic Radio Stations



The graph indicates the impact of donor support which allows higher salaries as in other radio stations.

Structure of Salaries of Radio Stations in Prishtina/Pristina



This graph shows that salaries in Prishtina/Pristina. It also indicates that the economic situation of the respected broadcasters is significantly better.

Turnover of Employees

This graph shows the turnover of employees since the broadcaster has started to operate. "High" stands for more than 50percent turnover and an average duration of employment from 6-12 months. "Normal" reflects change of staff due to regular reasons like marriage etc. and an overall consistent workforce.

