



South East European Network
for Professionalization of Media

ERODING MEDIA FREEDOMS, ERODING DEMOCRACY

The Future of the Media in Bosnia and Herzegovina – Facts and Trends

Anida Sokol

OUR MEDIA:

A civil society action to generate media literacy and activism,
counter polarisation and promote dialogue



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EXECUTIVE SUMMARY

Significant changes in journalism and the media have been unfolding in Bosnia and Herzegovina (BiH), yet these shifts have not been accompanied by adequate policies or interventions. This report outlines key trends affecting journalism, media usage, and democracy, highlighting issues crucial for the future of the profession:

- The number of journalism students has significantly decreased over the past decade, a trend which could lead to a shortage of qualified professionals in the long run.
- Although unemployment among journalists has declined in recent years, 2023 saw a considerable number of journalists lose their jobs due to the non-renewal of fixed-term contracts or being deemed surplus labour. Unionizing remains unpopular among journalists in the country and without protection mechanisms, journalism in BiH risks becoming even more unstable.
- Reports of attacks and violations of journalists' rights have increased in recent years, reflecting a decline in BiH's rankings on media freedom indexes.
- Despite rapid technological advancements, including the emergence of generative artificial intelligence, the media lack guidelines for their use or studies addressing potential abuses in the media. This absence of regulation and oversight increases the risk of misuse and potential harm.
- While regulatory and self-regulatory mechanisms exist, they fail to tackle a core issue in the media: biased reporting, which risks becoming normalized in journalistic practices.
- The digital era has brought a proliferation of media outlets, including new television channels. The growth of media outlets does not necessarily improve media pluralism, but could lead to smaller newsrooms, increased workloads of journalists and less quality journalistic content.
- Print media has been on the decline, and the country's major political weekly magazines have ceased publication. Without strategic interventions, print media operations will be difficult to sustain in the future.

- Media ownership transparency remains unregulated further aggravating media capture. Media outlets are predominantly owned by companies or individuals with business interests beyond the media sector.
- The advertising market has grown slightly in recent years, likely influenced by inflation. However, it remains insufficient to support the growing number of media outlets, posing challenges to financial sustainability.
- Television still dominates advertising revenue, but online media's share is steadily increasing, signalling that digital marketing will become increasingly dominant in the coming years.
- Public budgets and donor support remain important for sustaining media operations. Without proper regulation, financing from public budgets, however, bring risks to media independence.
- Media primarily serve the interests of the three major ethnic groups, excluding minorities from decision-making roles and positions in mainstream outlets, limiting media pluralism.
- In 2023, online media had a daily reach that was nearly on a par with television, showing that television is likely to lose its position as the most widely used information source.
- Facebook remains the most popular social network in BiH, followed by Instagram and YouTube, highlighting the strong influence and market dominance of Meta's platforms.
- Bosnia and Herzegovina ranks at the bottom of the Media Literacy Index among European countries. Low levels of media and information literacy skills lead to increased vulnerability of its citizens to propaganda and disinformation and increased polarization.
- The Democracy Index, Rule of Law Index, and Media Freedom Index have all been declining, with corruption remaining a pervasive issue.
- Data on media and journalism is often difficult to access, and there is a significant lack of research studies to inform effective policy interventions.

I.

INTRODUCTION

The report provides a concise analysis of a large set of data on the media, journalism, media consumption habits, and democracy in BiH. It highlights key trends, risks, and concerns shaping the future of journalism, media, and democracy, by examining the current state of play and significant changes in recent years that may further influence the future of the “fourth estate”, i.e. journalism, in the country.

Providing reliable and useful data on media and democracy is important for developing policies aimed at safeguarding media freedoms and the profession of journalism. Safeguarding journalism is an urgent need globally amidst changing media consumption habits of users who are turning their attention towards social networks and different content producers online, while large tech companies exert growing control over the news content audiences encounter. This urgency is particularly pronounced in captured states like BiH, where a weak advertising market and the absence of protective policies leave media outlets vulnerable to political and business influence, as many remain reliant on funding sources that compromise their editorial independence. Low levels of media and information literacy, combined with declining public trust in the media, further undermine the position and role of journalism.

The research on future of the media was conducted simultaneously in all countries of the Western Balkans and in Turkey, aiming to identify and analyse the current state of play and emerging trends in media, journalism, and democracy. In the first part of the research, carried out between April and September 2024, a large set of data on journalism, media landscape, ownership and finances, media representation and participation, media use, media trust, and democracy was gathered and analysed on country the level. The identified trends, risks, and opportunities will be further analysed through interviews and focus groups with different stakeholders in the second part of the research in 2025, resulting in recommendations for safeguarding journalism, media, and democracy. The research is a part of the regional project “Our Media: A Civil Society Action to Generate Media Literacy and Activism, Counter Polarization and Promote Dialogue”, implemented by nine media organizations from the Western Balkans, Turkey, and Slovenia in the period 2023–2026. The factual data presented in the tables in this report are only the part of the extensive data collection presented in the separate data report, available at the website of the Our Media project.¹

¹ Here is link to the Our media project web site: <https://seenpm.org/our-media-publications/>

II.

GENERAL COUNTRY DATA

The population of BiH has decreased, according to estimates. The 2013 Census recorded 3.5 million residents (The Census, 2013), while UN assessments in 2023 estimate the population at 3.2 million (UN, 2024; WHO, 2024). Data of the Union for Sustainable Development and Refugees in BiH shows that almost 600,000 people left the country in the period of 2013–2023, many of whom are believed to be young (Fena, 2023). In 2013, youth aged 15–29 accounted for 20% of the population, while the largest segment of the population, 51%, had completed secondary education.

The 2013 Census pointed to a concerning trend, revealing that nearly 3% of the population was illiterate, and 36% of individuals aged ten and older lacked basic computer literacy. While literacy rates, including computer literacy, are believed to have improved (UN BiH, 2021), there are still significant challenges in the education system. The 2018 Pisa testing pointed to urgent needs for educational reforms, revealing that half of the students were functionally illiterate, as they performed poorly on the tests (Džumhur, 2019). Additionally, the 2023 International Computer and Information Literacy Study (ICILS) showed that despite their frequent use of information and communication technologies, eighth-grade students lack the necessary skills to use digital information effectively (The Agency for Pre-school, Primary, and Secondary Education, 2024).

While GDP per capita and average salaries in BiH have shown growth, the country continues to grapple with significant economic challenges. High unemployment rates, particularly among young people (13% in 2023), and persistent inflation (6.1% higher in 2023 compared to 2022) highlight the ongoing need for structural reforms and targeted policies to foster inclusive and sustainable economic development.

Table 1: **GENERAL COUNTRY DATA**

| | |
|--|-------------------------|
| Total population of the country in 2023 | 2013: 3,531,159 |
| Population literacy rate in 2023 | 2013: 2.82% illiterate |
| GDP per capita in the country in 2023 (based on purchasing power) | USD 7,810 |
| Average salary in the country in 2023 | BAM 1263 (app. EUR 645) |

Sources: The 2013 Census; The Agency of Statistics of BiH;² The International Monetary Fund (2023)

² The Agency for Statistics of BiH. <https://bhas.gov.ba/Home/>

III.

THE FUTURE OF JOURNALISM

It is estimated that there are thousands of journalists in the country, given the large number of media outlets and the registered unemployed journalists. According to gender data from some employment offices, female journalists outnumber their male counterparts. In 2023, between 71–75% of those who were unemployed or found employment were women.³

Obtaining data on the journalism profession is challenging, primarily due to the complex administrative system, inconsistent record-keeping, and the non-responsiveness of certain institutions. Employment offices only provide information on the number of registered unemployed journalists, specifically those actively seeking work. In 2023, 558 journalists were registered as unemployed,⁴ with the largest numbers found in cantons that have journalism departments and numerous media outlets: Sarajevo Canton (216), Tuzla Canton (72), and Herzegovina-Neretva Canton (64). In 2023, there were four times more registered unemployed journalists in the Federation of BiH (444) compared to the RS (108). Such a high number of registered unemployed journalists reflects financial difficulties in the media sector and limited job opportunities.

In 2023, 558 journalists were registered as unemployed.

Being registered as unemployed may indicate that journalists are working as freelancers or without formal employment contracts. Many journalists in this situation rely on short-term contracts and irregular freelance assignments, which lack the stability and benefits of full-time employment. The number of registered unemployed journalists, however, has been steadily decreasing in recent years. In 2022, the unemployment rate dropped by 5% compared to the previous year, in 2023 by 11%, and as of May 2024, by 14%.⁵ However, this decline does not necessarily indicate that journalists have found employment within the media industry; some may have left the country or transitioned to other fields. Each year, between 155 and 175 journalists previously employed in the sector have registered as unemployed at employment offices. In Republika

³ Five employment offices in the Federation of BiH provided data on gender regarding unemployed journalists and those who were erased from the registers of unemployed: Zenica-Doboj Canton, Sarajevo Canton, Una-Sana Canton, Canton 10, Bosnian-Podrinje Canton.

⁴ Data obtained from 12 employment offices: 10 cantonal employment offices in the Federation of BiH, the employment office of RS and of the Brčko District.

⁵ In 2021, there were 667 unemployed journalists, in 2022, 630, in 2023, 556 and in 2024, 474. In some cantons, however, the number of registered unemployed journalists increased. For example, in the Central Bosnia Canton (2021, 10; 2022, 16; 2023, 23; 2024, 25).

Srpska (RS), the termination of fixed-term contracts and surplus labour are the primary reasons for this trend. Between 2020 and 2024, 87 cases were registered due to contract terminations, and 37 due to surplus labour.⁶ This trend highlights ongoing challenges in the media sector, such as job insecurity and a reliance on temporary employment.

The number of journalism students has significantly declined compared to ten years ago. There were twice as many journalism students (1160) at two departments of journalism in Sarajevo and Banja Luka in 2014 compared to 2023 at five departments (538). The number of journalism students at the University of Sarajevo in 2023 decreased by 70% compared to 2014 and in Banja Luka by 54%.⁷ Journalism student enrolment has steadily declined at most universities in recent years, due to decreasing interest among young people in pursuing journalism as a field of study.

There were twice as many journalism students (1160) at two departments of journalism in Sarajevo and Banja Luka in 2014 compared to 2023 at five departments (538).

Financial instability, poor wages and working conditions, political influence, and frequent attacks against journalists are some of the reasons why journalism is a less attractive and respected profession. The average salary of journalists, according to the information obtained from the Tax Administration of the Federation of BiH, ranges between EUR 330 up to EUR 1,000, reflecting differences between various positions and media outlets. The estimated average salary of journalists in 2012 was EUR 407 and it has not significantly increased despite inflation (Media Observatory, 2014).

A trade union of journalists does not exist at the national level, although a small number of worker unions are present in some larger public media outlets and in RS. The Independent Syndicate of Workers of the public service broadcaster BHRT is active, but journalists at BHRT do not have a signed collective agreement. The absence of trade unions for journalists means that journalists lack a collective bargaining body to represent their interests and advocate for better working conditions. Organizing or being a member of a trade union is not popular among journalists in the country and a far larger number of journalists are members of associations of journalists compared to trade unions.⁸ The Association of BH Journalists, the most active journalist association defending journalists' rights, gathers journalists from the whole country, but ethnic differences between journalist associations at the entity level are still present (Association of BH Journalists, 2019).

6 A total of 164 cases were recorded in which previously employed journalists registered as unemployed in RS in the period 2021–2024. The reasons for this were as follows: termination of fixed-term contracts (87 cases), surplus labour (37), consensual termination of employment (23), cessation of business operations (6), cessation of commercial activity (5), notification of termination by the employee or employer (5), and other reasons (1 case).

7 Data obtained from five universities with journalism/communication departments: Faculty of Political Sciences, University of Sarajevo; Faculty of Political Sciences, University of Banja Luka; Journalism and Multimedia, Banja Luka Collage; Faculty of Humanities, Džemal Bijedić Mostar; International Burch University, Digital Communications and Public Relations Department.

8 According to the research, 18% of journalists who responded to the questionnaire are members of trade unions and 62% of associations of journalists (Džihana, 2021).

Registered attacks and violations of journalists' rights in recent years have increased, especially online. In 2023, 87 cases of attacks and threats to journalists and violations of journalists' rights were registered, which is a 10% increase compared to 2022 (Initiative for Monitoring the European Integration of Bosnia and Herzegovina, 2024). Criminalization of defamation in RS in 2023 placed additional pressure on journalists, leading to criminal complaints against them for defamation and to increased self-censorship (Tomić, 2024). Although no data is available on the number of SLAPP cases, research conducted by the OSCE indicates that a significant number of defamation cases are filed by politicians over content related to public interest (UN BiH, 2022). While the confidentiality of journalistic sources is protected by defamation laws at the entity level and in the Brčko District, there have been instances where journalists were interrogated about their sources (Radević, 2022).

In its progress reports the EU Commission has been recommending for years that a better protection mechanism and systematic institutional follow-up of threats and violence against journalists should be set up (European Commission, 2024). In 2023, a network of contact points for journalists at prosecutors' offices was set up across the country with the aim to provide better support to journalists in cases of threats and attacks against them (MCOnline redakcija, 2024). The EU integration process could serve as a pathway to enhancing media freedoms and improving the security of journalists.

Training courses for journalists have not adequately kept pace with recent trends, particularly in developing digital skills. Civil society and professional journalist organizations provide workshops for journalists but there is a lack of mid-career training programmes and long-term journalism courses, including those on recent trends, such as on the ethical use of artificial intelligence in the media. Despite rapid advancements of generative artificial intelligence, no guidelines for their use or research studies about their potential abuse in the media have been conducted.

Regulatory authority, self-regulatory bodies, and journalist associations do not deal with the core issue in media reporting: politically biased media content due to political influence and lack of editorial independence. For years the Communications Regulatory Agency (CRA) has not been sanctioning broadcasters for breaches of fair and unbiased media reporting obligations, and there are no reactions from the Honor Journalist Council of BH Journalists over gross breaches of ethical standards by their members. The number of complaints submitted to the Press Council compared to ten and twenty years ago has significantly increased, but the work of the Press Council is severely jeopardized by the lack of resources and capacities. Many complaints refer to hate speech in user-generated content, while numerous breaches of ethical standards by online media remain unnoticed (Sokol, 2023). The regulator

does not monitor the media during elections campaigns and the number of complaints in this period is very small. Anonymous online news portals still pose a serious problem and were active during the Local Elections 2024 despite amendments to the Election Law imposed by the High Representative in 2024 according to which online media that report on the election campaign should publish information on their ownership (Sokol, 2024).

Table 2: **DATA ON JOURNALISTS AND JOURNALISM**

| | |
|--|---|
| Overall number of journalists in 2023 | 558 |
| TREND in the past 3 years: Is the overall number of journalists growing, declining, or remaining the same? | 168 journalists who were previously employed registered as unemployed in 2023 |
| Number of students of journalism (and communication and media studies) in 2023/2024 | 538 |
| TREND in the past 3 years: Is the number of students of journalism growing, declining, or remaining the same? | Declining 2023/2024: 538 2022/2023: 582 2021/2022: 614 |
| Average salary of journalists in 2023 | Between BAM 660 up to BAM 2,000 (EUR 330 up to EUR 1,000) |
| Number of attacks on journalists (and media) in the country in 2023 (including threats, intimidation, smear campaigns, physical attacks) | 87 attacks and violations of journalists' rights |
| TREND in the past 3 years: Is the number of attacks on journalists growing, declining, or remaining the same? | Growing 2022: 79 2021: 70 2020: 69 |
| TREND in the past 3 years: Is the number of complaints to the relevant national-level self-regulatory body growing, declining, or remaining the same? | Growing 2023: 698 2022: N/D 2021: 619 |

Sources: Twelve employment offices; five universities; Tax Administration of the Federation of BiH; BH Journalists; Press Council

IV.

THE FUTURE OF MEDIA

4.1. CONCEPT OF MEDIA

Even if the concept of the media has significantly evolved over the years, national regulation has not been following these changes. National regulation does not define the term “media”, but the codes of the CRA contain definitions of audiovisual and radio media services. Definitions of different types of media – electronic, online, print, social networks – were introduced only with the amendments to the Election Law imposed by the High Representative in 2022 (OHR, 2022). For years the media community has been calling for regulation of the online sphere, claiming that unregulated anonymous online news portals have a detrimental effect on the media sector, spreading problematic content and attracting audiences and revenues. Concerns exist that regulation, particularly the introduction of a register for online media, could lead to increased control over media freedoms.

Table 3: DATA ON CONCEPT OF MEDIA

| | |
|--|-----|
| The definition of media is established in national regulation. YES/NO/Partly | NO |
| The definition/concept of media and legal obligations arising from the legal definition of media have been the subject of public debate and contesting arguments. YES/NO/Partly | YES |

4.2. MEDIA LANDSCAPE

The number of media has significantly increased compared to twelve years ago, when it was estimated that there were less than 300 media in the country (Media Observatory, 2014). In 2024, it can be assessed that citizens have access to around a thousand or more media outlets from BiH, based on the data of the CRA, the Press Council, and research studies.

In 2024, 111 TV channels and 146 radio stations were registered at the CRA, of which most provide political news content. According to one research study, over 600 online news media were identified in 2021,⁹ while data of the Press Council show that more than 100 different types of print media, including newsletters of different associations and institutions, exist in the country.¹⁰ Access to a large number of foreign news channels is provided by 25 cable operators. Due to the lack of exact data for online and print media and constant changes especially in the online sphere, it is difficult to determine the exact number of the media from BiH.

Changes have been affecting all the media sectors. The number of online media has drastically grown compared to a decade ago: online news media are constantly being established, and there are cases where old ones become inactive. Establishing an online media outlet does not require a special permit, but only the purchase of the national or some other online domain, which costs from EUR 25 to EUR 40 (Buljubašić, 2024).

Even the number of TV channels has been growing in recent years because digitalization eased the process of obtaining registration permits from the CRA. A negative trend, however, has affected print media. The number of daily newspapers has remained steady, but some, such as *Dnevni Avaz* and *Oslobođenje*, are now published only five times a week. Additionally, all major weekly political magazines have either closed or shifted to publishing every two to three months. The sector of community media has never developed, despite the possibility of registering community radio stations at the CRA. The large number of local public broadcasters remains constant, supported by regular subsidies and grants from public budgets.

The growing number of media outlets does not necessarily result in improved media pluralism, but can lead to smaller newsrooms, greater workloads for journalists, and a decline in the overall quality of media content. Many outlets tend to offer similar political news, with few providing specialized or in-depth coverage.

9 The number is from a research study published in 2021, which mapped online news portals in BiH. The number, however, is non-exhaustive (Osmančević et al., 2021).

10 Data is taken from the website of the Press Council. Some information could be outdated.

Table 4: **DATA ON MEDIA LANDSCAPE**

| | |
|---|---|
| Total number of media in the country in 2023 | Around 1,000 (est.) |
| TREND in the past 3 years: Is the number of media growing, declining, or remaining the same? | Growing for TV stations: 2023: 102 TV stations 2022: 97 TV stations 2021: 85 TV stations |
| Total number of public service media in the country (national, local) in the country in 2023 | 87 public broadcasters 66 public radio channels 21 public TV channels (2024) |
| Total number of private, commercial media in the country in 2023 | 174 commercial broadcasters: 84 private radio channels 90 private TV channels (2024) |
| Total number of private, non-profit media in the country in 2023 | 2 community radio stations |
| Total number of daily newspapers in the country in 2023 | 7 |
| TREND in the past 3 years: Is the number of daily newspapers in the country growing, declining, or remaining the same? | Remaining the same |
| Total number of national TV channels with news content in the country in 2023 | 100 (2024) – out of all TV channels in the country |
| TREND in the past 3 years: Is the number of national TV channels with news content in the country growing, declining, or remaining the same? | 158 (2024) – out of all radio channels in the country |
| Total number of online news media in the country in 2023 | 615 (2021) |
| TREND in the past 3 years: Is the number of online news media in the country growing, declining, or remaining the same? | N/D |

Sources: CRA; Press Council; Infobiro; Osmančević et al. (2021).

4.3. MEDIA OWNERSHIP

Media in BiH are mostly owned by companies and individuals that have business interests beyond the media sector, according to the Media Ownership Monitor (BIRN, 2023). Commercial media outlets are mostly registered as limited liability companies and some as joint stock companies. A large number of broadcasters are public, registered as public enterprises and public institutions, while some investigative and niche online media are part of citizens' associations.

Media in BiH are mostly owned by companies and individuals that have business interests beyond the media.

Despite recommendations from the European Commission and advocacy by civil society organizations, a law on media ownership transparency has yet to be adopted. Information about ownership is typically not proactively published by media outlets and for many online media, especially anonymous ones that are not registered, ownership information is not available. Lack of transparency of media ownership poses risks for media integrity and independence.

The information about registered companies that own media outlets can be accessed through business registers, but the available information is very limited. The CRA maintains a register of its license holders, but it does not include ownership details. In 2024, the High Representative amended the Election Law, requiring online media that wish to report on election campaigns to disclose their ownership information. However, this amendment has had little effect in increasing transparency (Buljubašić, 2024).

Media ownership concentration is not specifically regulated in the country, but the Law on Competition of BiH prohibits the abuse of dominant position for all business entities (BIRN, 2023). Even though the media sector is fragmented and there are numerous media outlets, the Media Ownership Monitor still rated the risk of media audience concentration, media market concentration, and cross-media concentration as high for media pluralism. Top owners of TV, radio, print, and online media have large shares of audiences and of overall revenues (BIRN, 2023a).

Table 5: **DATA ON MEDIA OWNERSHIP**

| | |
|---|---|
| <p>Name the 3 biggest media owners in the country (owners of the biggest number of media and/or with the biggest audience reach and/or the biggest share in the advertising market). Add information about the country of origin for each of the 3 biggest media owners.</p> | <p>Biggest audience reach: TV: United Media (Nova TV and N1) Radio: Big Radio (Radio BiG 1; Radio BiG 2) Print: Avaz-Roto Press (Dnevni avaz, Avaz.ba, Azra magazine, Avaz Sport, Expres, Alfa TV, azra.ba) Online: Intersoft (Klix.ba)</p> <p>All companies are from BiH, except United Media, which has the largest share, from Luxembourg (55%).</p> |
| <p>TREND in the past 3 years: Has the list of the top 3 media owners in the country has changed?. YES/NO</p> | <p>NO</p> |
| <p>Media ownership concentration is regulated in the country. YES/NO/Partly</p> | <p>NO</p> |
| <p>Is transparency of media ownership regulated by law? YES/NO/Partly</p> | <p>NO</p> |
| <p>Media ownership is transparent in the country (credible information about who owns media is published). YES/NO/PARTLY</p> | <p>NO</p> |

Source: BIRN (2023)

4.4. MEDIA FINANCING

Even though the value of the advertising market, based on the estimates of advertising agencies, has grown in recent years, it is still smaller compared to a decade ago. In 2023, according to Direct Media in BiH,¹¹ the total value of the advertising market, including all media types and outdoor advertising, amounted to EUR 41–47 million, while in 2012 the value was estimated at EUR 50 million (Media Observatory, 2014). The value of the advertising market is small for the large number of media outlets, especially taking into consideration the growing prices of services and the impact of digital marketing.

Television still has the largest share in the national advertising market (64%), while the shares for radio (5%) and print are rather small (3%), with the latter declining. The share of online media, has been growing, amounting to 18% in

¹¹ Data was obtained from the marketing company Direct Media in BiH, which is part of the regional network Direct Media United Solutions that operates in the following countries: Serbia, BiH, Montenegro, Slovenia, Albania, and Macedonia, with affiliates in Croatia, Bulgaria, and Hungary. Data is not public and is available only for clients and for purchase.

2023. There are no estimates for the share of social media in digital marketing, but research studies from neighboring countries show that such percentages can be significant (Bilić Arar, 2022).

The marketing sector has been facing many obstacles, including the lack of exact data on the advertising market and independent measurement tools. Other challenges include high competition, lack of professional associations, the influence of regional media, and the lag behind global trends, including adapting to new technologies. Digital advertising is expected to take a dominant role in the coming years due to lower costs and broader reach (Internews and Velicon, 2024).

The marketing sector has been facing many obstacles, including the lack of exact data on the advertising market and independent measurement tools.

The total income of the public service broadcaster BHRT has been shrinking and its income from marketing is rather small compared to the amount received from licence fees. The Law on Public Television and Radio System of Bosnia and Herzegovina, according to which income from marketing and licence fees should be shared among the three public service broadcasters (BHRT, FTV and RTRS: 50%, 25% and 25%), is not respected.¹² BHRT has been suffering a grave financial crisis, which significantly deteriorated in 2023, leading to protests by its employees. All the three public service broadcasters (BHRT, FTV, and RTRS) received donations from the state in 2024, but direct state funding without proper safeguards and in the circumstances of strong political influence could further jeopardize editorial independence. The number of journalists working at BHRT has decreased, which can lead to additional workloads and less quality content.¹³

The media in BiH, especially public broadcasters, receive large sums of public money through regular subsidies and grants, but their allocation and transparency are not specifically regulated. No data is available regarding the total amounts allocated to the media from various public budget sources, and for years there have not been any comprehensive studies on the subject. Some information can be obtained through publicly available budgets, public procurement procedures, and requests for information (Hodžić and Sokol, 2018). Depending on the local government and public body, available information in some cases is not easily searchable and/or is difficult to attain. Non-transparent and arbitrary media financing from public budgets could lead to influences on editorial independence.

Donor support remains a significant source of funding especially for independent media but can bring risks of dependency on limited sources of funding and lack of long term sustainability. According to Global Forum for Media Development in the period 2020-2024, almost 26 million USD were

12 See, for example: Tomić (2024a).

13 There are 27 journalists working at BHRT, of which 13 are women. In 2012, it was estimated that there were around 200 journalists (Media Observatory, 2014).

allocated for the media sector, including trainings, advocacies and grants, but data is not exhaustive and some types of funding could overlap (Global Forum for Media Development, 2024).

Table 6: **DATA ON MEDIA FINANCING**

| | |
|---|---|
| Total value of the national advertising market (including all types of media) in 2023, in EUR | EUR 42–47 million (est.) |
| TREND in the past 3 years: Is the total value of the national advertising market growing, declining, or remaining the same? | Growing |
| Share of TV in the value of the national advertising market in 2023 | 64% |
| TREND in the past 3 years: Is the share of TV in the value of the national advertising market growing, declining or remaining the same? | Remaning the same |
| Total budget of the national public service broadcaster in 2023, in EUR | EUR 19 million |
| TREND in the past 3 years: Is the total budget of the public service broadcaster growing, declining, or remaining the same? | Declining 2022: EUR 19.9 million euro (BAM 38,976,452) 2021: EUR 21 million euro (BAM 41,191,227) |
| Share of the total budget of the national public service broadcaster in 2023 received from the state budget | 2023: None 2024: EUR 2 million (BAM 4 million) |
| Total amount of public funding (grants and subsidies) from the national government and local governments to media in the country in 2023 | N/D |
| TREND in the past 3 years: Is the total amount of public funding (grants and subsidies) to the media in the country growing, declining, or remaining the same? | N/D |
| Obligations of public bodies, institutions, and companies to publish data on funding to media are regulated by law? YES/NO/Partly | Partly |
| Data on allocated amounts of public funding to media outlets are published. YES/NO//Partly | NO |

| | |
|---|---|
| Total amount of state advertising (advertising of state bodies, institutions and state-owned companies) in the media in the country in 2023 | N/D |
| TREND in the past 3 years: Is the total amount of state advertising in the media in the country growing, declining, or remaining the same? | N/D |
| Total amount of international donor funding to the media in the country in 2023 | USD 25.8 million (2020–May 2024) (including different civil society projects) |
| TREND in the past 3 years: Is the total amount of international donor funding to the media in the country growing, declining, or remaining the same? | N/D |

Sources: Direct Media BiH; BHRT (2023); Global Forum for Media Development (2024)

4.5. MEDIA REPRESENTATION

Data on the overall number of female journalists is unavailable, but it is generally assumed that women make up a larger proportion of journalists compared to men, while men more frequently tend to occupy managerial positions. According to information provided by the CRA, out of the 266 radio stations and television broadcasters in the country in 2023, 30.8% of directors and 41.7% of editors-in-chief were women. Among the top five TV channels, only one manager is a woman, while there are more female managers among the top five online media (60%) and daily newspapers (40%). Four out of five editors of the top five daily newspapers and three out of seven editors of online media are women.

The number of minority media outlets in BiH is quite limited, with examples such as the online media *Newipe* for the Roma population, and magazines *Jevrejski Glasnik* for the Jewish community and *Uj Dobos* for the Hungarian community. Minorities are largely excluded from decision-making bodies and leadership roles in mainstream media limiting media pluralism. These outlets primarily serve the interests of the three main ethnic groups—Bosniaks, Serbs, and Croats—and there are no programmes available in minority languages.

Regulations require public service broadcasters to include one member from the “others” category on their management boards, in addition to the three members representing the three constituent peoples. Public media are also mandated to air one hour of programming per week dedicated to national minorities and, on a weekly basis, all television stations are required to provide accessible content for people with disabilities. However, it is unclear to what

extent these requirements are implemented in practice. While analyses of media coverage on issues such as gender-based violence and female political candidates are occasionally conducted, there is a lack of research studies focusing on the representation of minorities in the media. One research study showed that content related to human rights is not significantly present in the media (Turčilo, 2024).

Table 7: **DATA ON MEDIA REPRESENTATION**

| | |
|--|--|
| Share of female journalists in the country in 2023 | N/D |
| Share of journalists with an ethnic minority background in the country in 2023 | N/D |
| Share of women among news programme editors-in-chief and managers of the top 5 TV channels with news content in the country in 2023 | 20% |
| Share of persons under the age of 40 among news programme editors-in chief and managers of the top 5 TV channels with news content in the country in 2023 | 0 |
| Share of persons with an ethnic minority background among news programme editors-in-chief and managers of the top 5 TV channels with news content in the country in 2023 | N/D |
| Share of women on the board of the national regulatory authority for media in 2023 | 25%, BHRT |
| Share of persons with an ethnic minority background on the board of the national regulatory authority for media in 2023. | 25%, BHRT |
| TREND in the past 3 years: Is the number of minority media in the country growing, declining, or remaining the same? | N/D |
| Minority media were supported by public funding in 2023. YES/NO/Partly | N/D |
| Which minority communities are not served by own media or minority programming in national public service broadcasting? | Albanians, Montenegrins, Czechs, Italians, Jews, Hungarians, Macedonians, Germans, Poles, Roma, Romanians, Russians, Ruthenians, Slovaks, Slovenes, Turks, and Ukrainians. |

Source: Information obtained through desk research online and from data provided by the media online

4.6. MEDIA PARTICIPATION

Audiences usually share their opinions in comments sections of online media or on social media accounts of media outlets. Some online media invite citizens to send information to their editorial teams, while others occasionally conduct public surveys, especially during elections. According to the CRA, most TV broadcasters and radio stations offer contact programmes in their broadcasting. They often provide specific contact details for individual programmes to facilitate communication between editors and the audience. Interaction with audiences is mostly conducted online, but there are still instances where citizens sent letters to media outlets, such as to the public service broadcaster BHRT. Media outlets, however, rarely conduct research on their audience needs, while comments sections often lack constructive dialogue and some, despite the efforts of some online media to moderate and filter them, contain insults and hate (IREX, 2024). Media monitoring during the period of the Local Elections 2024, for example, showed that voices of citizens are largely excluded in election coverage (Džihana and Sokol, 2024).

Table 8: **DATA ON MEDIA PARTICIPATION**

| | |
|--|--|
| <p>The majority of the media in the country commonly provide mechanisms for participation and interaction with citizens/ readers, listeners, viewers (comment sections, letters to the editor, forums, blogs, readers' editor, ombudsman, other type of complaint mechanism, membership, internship, focus groups,...). YES/NO/Partly</p> | <p>YES</p> |
| <p>TREND in the past 3 years: Is the number of mechanisms for participation in the media in the country growing, declining, or remaining the same (e.g. comment sections closing down or opening, ombudsman established or shut down etc.)?</p> | <p>N/D</p> |
| <p>3 most common mechanisms of (citizen) participation in media in the country</p> | <p>Comments sections, contact programmes</p> |

V.

THE FUTURE OF MEDIA USE AND TRUST

5.1. MEDIA USE

Despite the prevalence of television as the main source of information, the daily reach of online media and social networks has been significantly growing. Television was the most used source of information in the country in 2021, followed by social networks and online media (Hasanagić, Papović and Lević, 2021; Sokol, 2021). For younger generations (18–29), however, social networks were the main source of information in 2021, and they more often obtained information following social networks and online media compared to those in older age groups. In 2023, according to the TGI data for BiH, television still had the largest audience reach (85.50%), but the daily reach of online media and social networks has grown in recent years.¹⁴ In 2023, online media had a daily reach that was nearly on a par with television at 84%, while the daily reach of social networks was 74%. Facebook remains the most popular social network in BiH, followed by Instagram and YouTube. This trend holds true even among younger generations, highlighting the strong influence and market dominance of Meta's platforms. The two most watched TV news shows in the country in 2023 were news shows of popular commercial broadcasters, NOVA BH and BNTV, while the public broadcaster of the Federation of BiH (FTV) secured third place with its news programming, reflecting the preference for commercial news sources among viewers. According to the Media Literacy Index, Bosnia and Herzegovina is at the bottom regarding the level of media literacy, and in 2023 held 37th place among 41 countries (Open Society Institute, 2023). Civil society organizations provide occasional workshops on media and information literacy, which, however, has not been integrated in different grades in primary and secondary education. Lack of media literacy skills make citizens vulnerable to misinformation, online scams, and propaganda.

According to the Media Literacy Index, Bosnia and Herzegovina is at the bottom regarding the level of media literacy.

¹⁴ TGI (Target Group Index) on audiences in BiH, conducted by the international market research company Kantar, was provided by Direct Media in BiH.

Table 9: **DATA ON MEDIA USE**

| | |
|---|---|
| Media type that is the most often used source of news and information for citizens in the country in 2023 | Television (2021) |
| TREND in the past 3 years: The media type which is the most often used source of news and information for citizens in the country changed. YES/NO If yes, from which type to which type? | N/D |
| Which media type was the most often used source of news and information for youth (age between 15 and 29) in the country in 2023? | Social networks |
| Audience reach of the media type "Television" in the country in 2023 | 85.50% |
| Top 3 most popular (most used, visited) social media in the country in 2023 | Facebook: 68.70% Instagram: 44.70% YouTube: 41.10% |
| Top 3 most popular (most used, visited) social media among youth (age between 15 and 29) in the country in 2023 | Facebook: 80.80% Instagram: 75.80% YouTube: 56.89% |
| Top 3 most popular (most watched) TV news shows in the country in 2023 | Dnevnik (Nova BH) Dnevnik 2 (BN TV) Dnevnik 2 (FTV) |
| Media Literacy Index for the country in 2023. | Score 24/100 Rank: 37/41 |
| TREND in the past 3 years: Is the Media Literacy Index growing, declining, or remaining the same? | N/D |
| Media literacy is a separate subject in elementary or secondary schools. YES/NO/Partly | NO |

Sources: Hasanagić, Papović and Lević (2021); Sokol (2021); TGI data; Open Society Institute (2023)

5.2. MEDIA TRUST

Media trust is highly polarized, with a growing number of citizens expressing distrust. According to TGI data for 2023, only 4% of citizens definitively trust the media, and 11% tend to trust it, while a significantly larger proportion either disagree (28.9%) or strongly disagree (28.9%) with the statement that they trust the media. Citizens generally place more trust in traditional media compared to online platforms and social networks, with polarization further heightened by ethnic and political affiliations (Sokol, 2021). According to a 2021 research study, the primary reasons for media distrust are political influences and the spread of disinformation. The study also revealed that no single media outlet stood out as having an exceptionally high level of trust or distrust (Sokol, 2021). However, BN TV and the public service broadcaster of the Federation of BiH were identified as the most trusted outlets, followed by the public service broadcaster from RS (RTRS) and N1. Notably, RTRS's inclusion as a trusted media source raises concerns, as it is known for propagandistic reporting that favours the leading political party in RS.

Citizens generally place more trust in traditional media compared to online platforms and social networks.

While trust in the media is low, it remains higher compared to other institutions. According to annual surveys conducted by the Association of BH Journalists and the Friedrich-Ebert-Stiftung (2023), in 2023 67% of citizens trusted the media, followed by religious organizations (53%), and the non-governmental sector (43%). However, trust in all institutions, including the media, has been declining in recent years, pointing to a critical challenge for the future of the media.

Table 10: DATA ON MEDIA TRUST

| | |
|---|---|
| <p>Level of overall trust in media in the country in 2023 (in percentage)</p> | <p>“I trust the media” Definitely agree (4%) Tend to agree (11%) Neither agree or disagree (27%) Tend to disagree (28.9%) Definitely disagree (28.9%)</p> |
| <p>TREND in the past 3 years: Is the level of overall trust in media in the country growing, declining, or remaining the same?</p> | <p>Declining Statement: “I trust media” Definitely agree: 3.7% (2021), 3.5% (2022), 3.8% (2023) Tend to agree: 12.1% (2021), 10.0% (2022), 10.4% (2023) Neither agree nor disagree: 31.1% (2021), 28.6% (2022), 25.5% (2023) Tend to disagree: 24.9% (2021), 25.8% (2022), 27.1% (2023) Definitely disagree: 22.4% (2021), 28.5% (2022), 27.2% (2023)</p> |
| <p>Top 3 most trusted media types in the country in 2023</p> | <p>Television, Radio, Press</p> |
| <p>TREND in the past 3 years: The order of the top 3 most trusted media types in the country has changed. YES/NO. Which media types have changed places among the top 3?</p> | <p>N/D</p> |
| <p>In which place do the media stand in the ranking of the most trusted institutions in the country in 2023?</p> | <p>1st place (media): 67%</p> |
| <p>TREND in the past 3 years: Is the ranking (place) of the media among the most trusted institutions in the country growing, declining, or remaining the same?</p> | <p>The first place is remaining the same but the level of trust is declining 2022: 80% 2021: 76%</p> |

Sources: TGI, Association of BH Journalists, and Friedrich-Ebert-Stiftung (2023)

VI.

THE FUTURE OF DEMOCRACY

BiH is a partially democratic country, described as a hybrid or transitional regime according to the 2023 Freedom House Index (Freedom House, 2023). Countries with this score are electoral democracies with fragile democratic institutions and challenges to the protection of political rights and civil liberties. BiH operates under a highly decentralized consociational system, characterized by power-sharing among the three primary ethno-national groups: Bosniaks, Serbs, and Croats. According to the Freedom House Index, decision-making at the state level is frequently paralysed by disagreements among the leaders of these groups, compounded by regular boycotts of state institutions and decisions issued by the High Representative. The High Representative, appointed by the international community, oversees the implementation of the Dayton Peace Agreement but often faces resistance, particularly from political leaders in Republika Srpska (Freedom House, 2023). In 2023, officials in Republika Srpska even passed laws with the aim to block the implementation of the High Representative's decisions and the BH Constitutional Court decisions. EU candidate status was granted to BiH in 2023, despite the lack of progress in democratic and economic reforms, including in safeguarding freedom of expression.

Voter turnout in recent elections cycles has been slightly decreasing, but overall is very small and amounts to around 50%.

The Democracy Index, Rule of Law Index (World Justice Project) and Media Freedom Index (Reporters Without Borders) have been declining in recent years, pointing to worrying trends. Corruption remains a serious problem in the country and the EU Commission's progress report from 2023 stresses the need for urgent measures to strengthen integrity and restore public confidence in the judiciary. Voter turnout in recent elections cycles has been slightly decreasing, but overall is very small and amounts to around 50%. According to the coalition "Pod lupom", during the General Elections 2022, the key electoral irregularities were prohibited campaigning, illegal trading of mandates in electoral committees, and pressure on voters (Koalicija "Pod lupom", 2022). Media freedoms have significantly deteriorated in 2023, especially after the recriminalization of libel in RS in 2023. The implementation of laws ensuring freedom to access information remains limited. The newly introduced Law on Freedom of Access to Information at the state level has faced criticism from civil society organizations due to its numerous exemptions. Additionally, the Complaints Council is a body within the Council of Ministers, which is

regarded as politicized (Šečerović, 2024). Protests against recriminalization of libel in RS were organized in 2023 but were attended by only a small number of journalists, which shows that citizens are not concerned with limits to freedom of expression.

Table 11: **DATA ON DEMOCRACY**

| | |
|--|--|
| Democracy Index of the country in 2023 | Partially free Score: 52/100 (Global Freedom) Score: 37/100 (Nations in Transit) |
| TREND in the past 3 years: Is the Democracy Index of the country growing, declining, or remaining the same? | Declining 2022: 53/100, 2021: 53/100 (Global Freedom) 2022: 38/100, 2021 39/100 (Nations in Transit) |
| Rule of Law Index of the country in 2023 (according to the World Justice Project) | 75/142 |
| TREND in the past 3 years: Is the Rule of Law Index of the country growing, declining, or remaining the same? | Declining 2023: 75/142 2022: 70/140 2021: 72/139 |
| Corruption Perceptions Index for the country in 2023 | Score: 35 Ranking: 108/180 |
| TREND in the past 3 years: Is the Corruption Perceptions Index for the country growing, declining, or remaining the same? | Remaining the same 2023: 35 2022: 34/100 2021: 35/100 |
| Media Freedom Index in the country in 2023 | 65,43 |
| TREND in the past 3 years: Is the Media Freedom Index in the country growing, declining, or remaining the same? | Declining 2022: 65,63 2021: 71,66 |
| Is there is transparency and open public access to data about the spending of public funds? YES/NO/Partly | Partly |
| Legislation on access to public information follows international standards. YES/NO/Partly | YES |

| | |
|---|------------|
| <p>There is a functional and credible independent institution supervising the implementation of the legislation on access to public information, including the administration of complaints regarding denied access. YES/NO/Partly</p> | <p>NO</p> |
| <p>Were there government or parliament members under prosecution for charges of corruption or other criminal charges in 2023? YES/NO</p> | <p>YES</p> |
| <p>Does legislation allow political party ownership in the media in the country? YES/NO/Partly</p> | <p>YES</p> |

Source: Freedom House (2023); World Justice Project (2023); Reporters Without Borders (2023); media reports

VII.

CONCLUSIONS

The report highlights key trends in the media sector in BiH, emphasizing the profound impact of digitalization on media production, distribution and audience consumption habits, and the lack of corresponding policy responses. It shows how state capture has contributed to the erosion of public trust in the media, with political influence and disinformation identified as key factors.

Digitalization has contributed to an increase in the number of media outlets, including television channels, despite the struggles of the advertising market. Although the value of the advertising market has slightly increased in recent years, it remains insufficient to support the growing number of media outlets. This imbalance poses challenges to financial sustainability, exacerbated by a lack of independent audience measurement tools, professional associations, and the failure of many media outlets to adapt to global trends and technologies. Adapting to global trends and incorporating new technologies, such as the transparent and ethical use of AI, can help smaller newsrooms enhance their audience reach, as well as improving content production and distribution.

As audience shares of online media and social networks continue to grow, it is evident that television is likely to lose its position as the most widely used information source. Social media is already the primary news source for younger audiences, with its reach continuing to expand. Marketing agencies have observed that the internet now has the greatest influence on purchasing decisions, signalling that digital marketing will become increasingly dominant in the coming years due to its cost-effectiveness and broad reach. In contrast, the print media's daily reach and market share in national advertising have deteriorated, suggesting that without strategic interventions, print media operations will face significant challenges in the future.

The growing number of media outlets does not necessarily lead to improved media pluralism. On a poor and oversaturated media market, unprotected labour rights of journalists and a declining number of journalism students, it can lead to smaller newsrooms, greater workloads for journalists, and a decline in the overall quality of media content. The interest among students to study journalism has declined, with financial instability, poor wages and working conditions, and political influence being some of the main reasons why journalism is a less attractive and respected profession.

Political influence over the media continues to be a major issue, and media freedoms have steadily declined, reflecting broader erosion of democracy and the rule of law. Ethical journalism has relied on a group of highly skilled editors and reporters committed to delivering quality news. Some smaller local newsrooms, along with donor-supported investigative and niche media outlets, have remained steadfastly professional and resilient against various external pressures.

Trust in the media has been declining and is highly polarized along ethnic and political lines, while low levels of media and information literacy skills make citizens vulnerable to manipulation and polarization. The findings point to a critical challenge for the future of media: rebuilding trust in an environment dominated by political influence and corruption and low levels of media literacy. While the media still holds relatively higher trust compared to other institutions, the general decline in trust across all sectors indicates a broader crisis of confidence that must be addressed.

In a partially free democracy, where political and economic elites dominate, and corruption remains pervasive, safeguarding journalism is an increasingly difficult task. Without legal and policy reforms, journalism in BiH risks becoming even more unstable, despite its essential role in a functioning democracy.

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Agency of Statistics of BiH
Association of BH Journalists
Communications Regulatory Agency (CRA)
Direct Media BiH
Employment Office of the Bosnian Podrinje Canton
Employment Office of the Brčko District
Employment Office of the Canton 10, Livno office & Tomislavgrad office
Employment Office of the Canton Sarajevo
Employment Office of the Central Bosnia Canton
Employment Office of the Herzegovina-Neretva Canton
Employment Office of the Posavina Canton (Orašje)
Employment Office of the Republic of Srpska
Employment Office of the Tuzla Canton
Employment Office of the Una-Sana Canton
Employment Office of the West Herzegovina Canton
Employment Office of the Zenica-Doboj Canton
Faculty of Humanities, Džemal Bijedić Mostar
Faculty of Political Sciences, University of Banja Luka
Faculty of Political Sciences, University of Sarajevo
Journalism and Multimedia, Banja Luka College
Infobiro, Mediacentar Sarajevo
Press Council BiH
Radio-television of Bosnia and Herzegovina
Tax Administration of the Federation of BiH

Data on market assessment and on media usage and audience measurement TGI (Target Group Index) for BiH was obtained from the Agency Direct Media in BiH.

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Anida Sokol is an editor and researcher at Mediacentar Sarajevo. She has a master's degree in English language and literature from the Faculty of Philosophy in Sarajevo, and she earned a PhD in History of Europe as a Basileus scholar at the Faculty of Political Science of the University Sapienza in Rome, where she worked as a researcher. She has published a number of works on the topic of media, memory and politics in BiH, among other things, in the magazine *Politička misao*, for Palgrave Macmillan and Mediacentar Sarajevo. She taught politics and media and political communication at the International Burch University in Sarajevo and the Sarajevo School of Science and Technology.

ERODING MEDIA FREEDOMS, ERODING DEMOCRACY

The Future of the Media in Bosnia and Herzegovina – Facts and Trends

This publication is the result of research undertaken as part of the project **“Our Media: A civil society action to generate media literacy and activism, counter polarisation and promote dialogue”**. The second research series was conducted in the thematic framework titled **“The Future of the Media in the Western Balkans and Turkey”**, focusing, in 2024, on collecting and analysing the facts and trends on media and democracy in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia, and Turkey.

The project **“Our Media: A civil society action to generate media literacy and activism, counter polarisation and promote dialogue”** is jointly implemented by nine media development organisations from the Western Balkans and Turkey with the financial support of the European Union. The coordinator of the three-year project is the Foundation Mediacentar Sarajevo. Partners in the project are the Albanian Media Institute in Tirana; Bianet in Istanbul; the Macedonian Institute for Media in Skopje; the Montenegro Media Institute in Podgorica; the Novi Sad School of Journalism; the Peace Institute in Ljubljana; the Press Council of Kosovo in Pristina; and the South East European Network for Professionalization of Media (SEENPM).



South East European Network
for Professionalization of Media