

MEDIA

SUSTAINABILITY

INDEX

2004



IREX

“THE PROBLEM IS WITH THEIR ENFORCEMENT. THE WAY THE REGULATIONS ARE APPLIED DEPENDS ON HOW THE GENERAL PUBLIC REGARDS FREEDOM OF SPEECH, WHICH IS STILL NOT HELD IN GREAT RESPECT,” STATED YASSEN BOYADJIEV.



In 2004, Bulgaria made rapid progress toward achieving its chief policy goals: democratic reform, economic restructuring, and integration with the institutional structures of the West. Bulgaria became a NATO member, and even though it missed the first wave of European Union (EU) expansion, it continued to catch up rapidly with the eight Central and East European countries that joined the EU in May 2004. By the end of the year, Bulgaria had successfully completed accession negotiations with the EU and is expected to become a full member in 2007. On the international scene, Bulgaria continued as a strong member of the antiterrorism coalition and contributed troops in both Iraq and Afghanistan. Casualties inflicted by Iraqi insurgents on the Bulgarian contingent and the executions of Bulgarian hostages in 2004 did not lead to withdrawal of support.

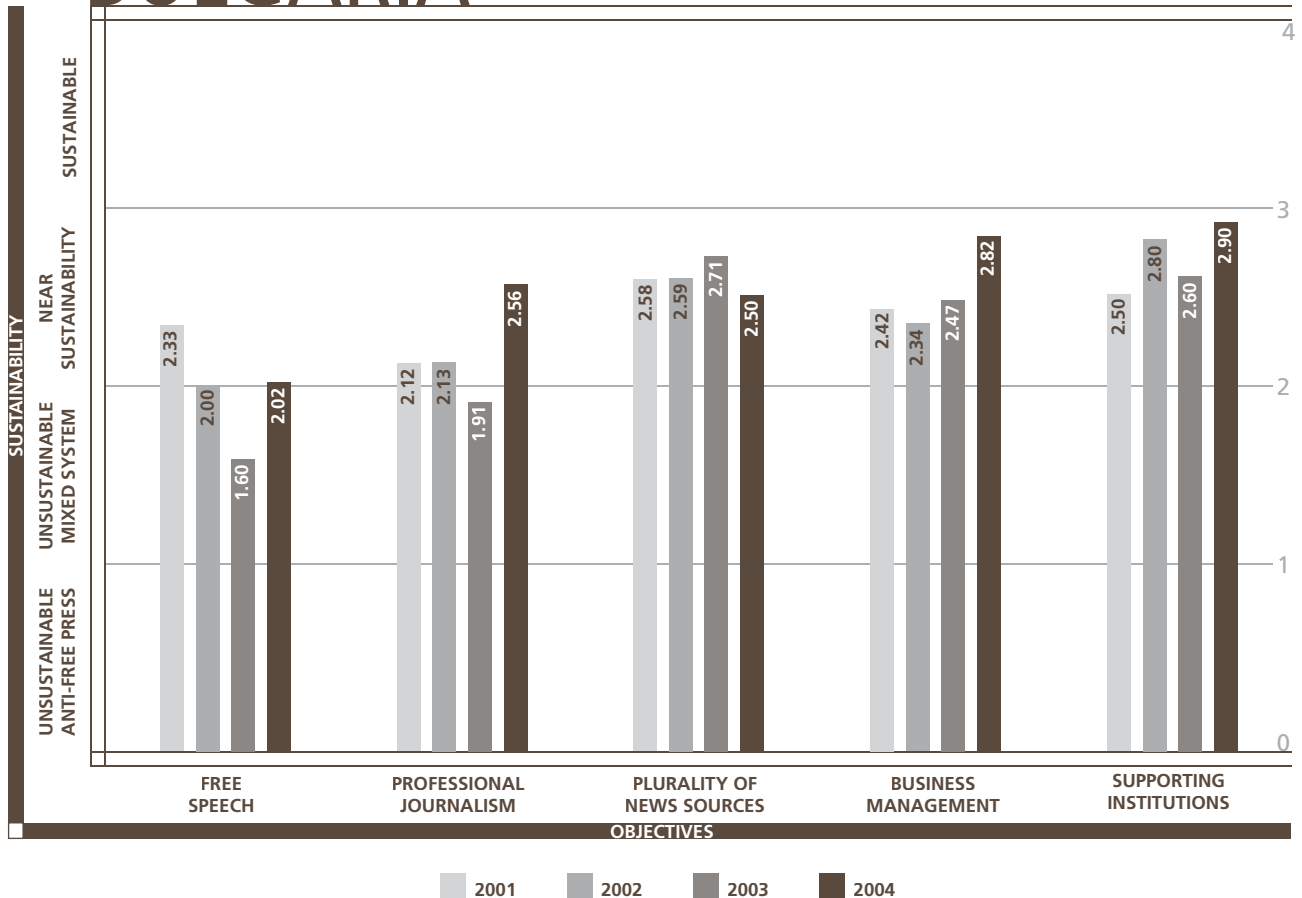
The Bulgarian economy is in its best condition since the end of communism in 1989. Growth is steady, the national currency (pegged to the euro) is stable, unemployment is at its lowest level in the past 12 years, privatization is reaching its final phase, and international investment has grown significantly. At the same time, Bulgaria remains among the poorest European countries. Reforms in the social services have not been successfully completed, and critical issues such as fighting corruption, establishing the rule of law, and reforming the judiciary remain unresolved. Social divisions in the country have deepened, with ethnic minorities, rural communities, young children, and the elderly among those suffering the most.

The Bulgarian media sector has generally benefited from the positive economic and political developments in the country. From a business perspective, the television and print advertising markets grew in 2004, and the radio industry continued rapid, if not entirely transparent, consolidation. For professional journalism, however, the developments in 2004 were not very encouraging. State-owned television and radio stations did not progress toward becoming public broadcasters. Professional standards in many outlets, including media with national reach and significant impact on public opinion, fell victim to political and business interests. Nevertheless, despite these limitations, Bulgarian media remained among the most active



MEDIA SUSTAINABILITY INDEX

BULGARIA



Unsustainable, Anti-Free Press (0-1): Country does not meet or only minimally meets objectives. Government and laws actively hinder free media development, professionalism is low, and media-industry activity is minimal.

Unsustainable Mixed System (1-2): Country minimally meets objectives, with segments of the legal system and government opposed to a free media system. Evident progress in free-press advocacy, increased professionalism, and new media businesses may be too recent to judge sustainability.

Near Sustainability (2-3): Country has progressed in meeting multiple objectives, with legal norms, professionalism, and the business environment supportive of independent media. Advances have survived changes in government and have been codified in law and practice. However, more time may be needed to ensure that change is enduring and that increased professionalism and the media business environment are sustainable.

Sustainable (3-4): Country has media that are considered generally professional, free, and sustainable, or to be approaching these objectives. Systems supporting independent media have survived multiple governments, economic fluctuations, and changes in public opinion or social conventions.

agents of reform, especially in fighting corruption and organized crime—although investigative journalists faced serious problems as state prosecutors launched probes against journalists who used hidden cameras in their reporting.

Overall, the Media Sustainability Index (MSI) panel concluded that Bulgaria’s course toward media sustainability was confident during 2004. Although there is no guarantee against political developments slowing progress in the future, the improved MSI evaluations indicated that media are becoming less vulnerable to economic and partisan pressures.

OBJECTIVE 1: FREE SPEECH
Bulgaria Objective Score: 2.02 / 4.00

All indicators under this objective have scored higher than last year, indicating steady progress and a lack of major encroachments on freedom of speech in 2004. The only deteriorating indicator relates to the effectiveness of the measures for legal and public

Legal and social norms protect and promote free speech and access to public information.

- FREE-SPEECH INDICATORS:**
- > Legal/social protections of free speech exist and are enforced.
 - > Licensing of broadcast media is fair, competitive, and apolitical.
 - > Market entry and tax structure for media are fair and comparable to other industries.
 - > Crimes against journalists or media outlets are prosecuted vigorously, but occurrences of such crimes are rare.
 - > State or public media do not receive preferential legal treatment, and law guarantees editorial independence.
 - > Libel is a civil law issue; public officials are held to higher standards, and the offended party must prove falsity and malice.
 - > Public information is easily accessible; right of access to information is equally enforced for all media and journalists.
 - > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
 - > Entry into the journalism profession is free, and government imposes no licensing, restrictions, or special rights for journalists.

protection of the freedom of speech. The MSI panelists described a general stagnation, with the general public still insensitive to free speech as a basic value and not particularly responsive to violations. “From the legal point of view, constitutional and legislative guarantees are in place,” said Yassen Boyadjiev, Free Speech Forum secretary and program director of Info Radio. “The problem is with their enforcement. The way the regulations are applied depends on how the general public regards freedom of speech, which is still not held in great respect.” Added Ivo Draganov, a media expert and former media regulatory council member: “Years ago the society was ready and willing to react with vigor to any encroachment on free speech. These days it’s not a big deal, and people do not feel they’re being deprived of a basic right.”

“We lack a set of rules on how public radio and television need to be run. We have deep political and economic dependence. Political connections can secure one a job at the national Radio and TV. And they can get one fired,” noted Boyko Stankushev.

Entry into the journalism profession and the media’s access to international information sources continued unrestricted during 2004. There was notable improvement regarding the journalists’ access to public information. The panelists pointed to a number of cases in which journalists won favorable court rulings in challenges filed after they were denied access to information. The panelists agreed that most instances of refused access to information resulted from the public officials’ incompetence, rather than from a determined intent to deny them information.

The panelists described the unchanged status of the Bulgarian national radio and television stations as a major concern. The broadcasters had long been declared public but continued to receive government subsidies as well as compete with commercial broadcasters for advertising revenue. Although the election of the broadcaster’s director general is entrusted to a regulatory body that is formally apolitical, the panel said there was still reason to question the independence of some members from corporate and political affiliations. In addition, the directors of both the radio and television sectors, allowed to appoint management boards subject to the approval of the Council for Electronic Media, have chosen members closely politically affiliated with the ruling majority. Meanwhile, the outlets continue

to struggle against direct political and commercial meddling with their management, and panelists predicted that eventually the managers would fail to remain free from outside influence. Television journalist Boyko Stankushev explained: “We lack a set of rules on how public radio and television need to be run. We have deep political and economic dependence. Political connections can secure one a job at the national Radio and TV. And they can get one fired.”

Licensing continues to be poorly rated because of the complete failure to award new broadcast licenses in 2004. Parliament has been at odds since 2002 with the Council for Electronic Media, which it helped to create. Dissatisfied with the Council’s choice for the television director general, it passed amendments in the Radio and Television Law aimed at preventing the council from issuing new licenses. One of these amendments required a National Strategy for Media Development to be passed by parliament before any new licenses are issued. The Council has developed and submitted such a strategy, but parliament deliberately has not acted on the document. Instead, it has encouraged work on a new media law that would allow changes in the regulatory body, but that law has not passed either. With no working licensing procedure in place, the radio market has moved into a phase of semi-legal consolidation. Unable to get new licenses and not permitted by law to buy existing ones, Sofia-based national radio networks have bought the companies owning regional licenses in different markets or bypassed the law by signing re-broadcasting contracts with local stations. As a result, several national networks already control large numbers of frequencies in the country. While this process is based on sound business factors, a side effect is the near disappearance of local independent radio programming. These significant changes are taking place with the silent approval of the regulatory authorities.

OBJECTIVE 2: PROFESSIONAL JOURNALISM
Bulgaria Objective Score: 2.56 / 4.00

The professional level of Bulgarian journalism features notable growth from the previous year. The high degree of compliance with internationally recognized standards was a positive sign, the MSI panelists said, and the 2004 evaluation showed show an overall trend toward potential sustainability, despite the lingering dependency on political and government processes.

Panelists noted the generally even balance between informational and entertainment programming. Even

Journalism meets professional standards of quality.

- PROFESSIONAL JOURNALISM INDICATORS:**
- > Reporting is fair, objective, and well sourced.
 - > Journalists follow recognized and accepted ethical standards.
 - > Journalists and editors do not practice self-censorship.
 - > Journalists cover key events and issues.
 - > Pay levels for journalists and other media professionals are sufficiently high to discourage corruption.
 - > Entertainment programming does not eclipse news and information programming.
 - > Technical facilities and equipment for gathering, producing, and distributing news are modern and efficient.
 - > Quality niche reporting and programming exists (investigative, economics/business, local, political).

the smallest regional outlets have developed their own news programs. This is partly a response to Bulgarian audience interest in news and current affairs, meaning that news programs do well commercially. Another reason is that concentration in the newspaper and radio industries has left local cable television stations, largely supported by subscription fees, as the only providers of local news. These stations and independent television producers, including TV Recording in Haskovo, Arena TV in Russe, and SKAT TV in Burgas, have become important sources of local information. However, panelists said that BNT is undermining its public-television status by pursuing higher ratings through entertainment programming and by reducing its current affairs and commentary programs. A survey carried out in 2004 indicated that both bTV and Nova TV, the two commercial television stations with national broadcast licenses, have a higher percentage of news and current affairs in their schedules than BNT.

Bulgarian media generally succeed in providing coverage of key events and issues of public importance. There have been no obstacles—not even security-related—to journalists reporting on major domestic or international events. Reporters from all major Bulgarian media traveled to Iraq during 2004 to report first-hand on the country’s contingent there.

Bulgarian media improved their technical capacity during 2004. Panelists indicated nearly sustainable

development in this area, although few Bulgarian outlets can afford the latest high-tech professional television equipment and even fewer can obtain minicams for journalistic investigations. However, panelists said the use of technology in investigative reporting is more hindered by legislation than affordability. Filming with hidden cameras remains a crime under Bulgarian law, with a British Broadcasting Corporation crew coming under investigation in August 2004 for using a hidden camera to expose the local Olympic Committee chief in a corruption scandal. The BBC crew posed as businessmen trying to buy votes for London's bid to host the 2012 Olympics and used a hidden camera to document the Bulgarian International Olympic Committee member's allegedly positive response to the offer. Prosecutors took no action against the official but launched a case against the British reporters. A few weeks later a similar scandal erupted, when state prosecution ordered an investigation of Romanian journalist George Buhnici, who was arrested and prosecuted for the possession of a hidden camera. In both cases, prosecutors referenced penal code statutes banning the use of hidden technical means for recording that initially had been intended to prevent former Communist secret-police agents from using such devices in racketeering. The panel viewed the investigations against the journalists as extremely serious threats to the media's ability to investigate corruption.

Bulgarian outlets still lag in the quality of beat reporting. An unfavorable market and the failure of media owners and producers to train their staff in niche reporting still undermine the quality coverage of some events and issues. This situation is particularly relevant for local and small outlets. Zoya Dimitrova, deputy editor-in-chief of the *Politika* weekly and head of the Investigative Journalism Foundation, said, "The owners of small outlets would rather save on paychecks than have their staff trained in beat reporting." Panelists, however, noted consistent overall progress in this area. "Journalism is consistently becoming more professional; a variety of viewpoints is represented," said Yassen Boyadjiev, Free Speech Forum Secretary and program director of Info Radio.

The enforcement of ethical self-regulation improved markedly during 2004, largely due to the adoption of an ethical code by most Bulgarian outlets, MSI panelists said. With significant assistance from the BBC under an EU-funded project, Bulgarian media organizations put together their various existing provisions and developed, discussed, and formally passed a unified Code of Ethics. The Association of Bulgarian Broadcasters (ABBRO), the Association of

Bulgarian Publishers, the Bulgarian Media Coalition, the journalist unions, and some leading outlets endorsed the code. By year's end, most media outlets had not started applying the code, the body that will oversee its enforcement had not been elected, and media outlets were debating whether this panel should be split into print and broadcast divisions.

However, the fact that key media outlets and nongovernmental organizations (NGOs) worked jointly on the issue was seen as an important guarantee of its success.

The salary level for journalists remained inconsistent with wages in other professions. Pay scales are disproportionate at public versus commercial outlets, and in national versus regional media. While national commercial media have reached levels that manage to attract and keep the best journalists in the country, public and especially regional media pay far less and suffer from a constantly changing and inexperienced staff. Generally, journalists' wages are not sufficient to fully prevent corruption.

Panel members pointed out lingering self-censorship, primarily when reporters and editors refrain from any coverage that might reflect negatively on the business activities or personal behavior of media outlet owners or major advertisers. Self-censorship is usually masked as being compliance with the editorial policy of the outlet

and is considered largely a result of the weak status of the journalism profession. The labor rights of journalists are not sufficiently protected, leaving them vulnerable to losing their jobs. This is particularly true for journalists at regional outlets, who often work without a labor contract.

Panelists pointed out that investigative journalists are in the most danger of being corrupted due to their exposure to corrupt individuals or business interests. In such cases, money is offered to journalists or outlets to stop negative reporting or ensure favorable coverage.

"The owners of small outlets would rather save on paychecks than have their staff trained in beat reporting," Zoya Dimitrova declared.

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Luba Rizova, news director at bTV, explained: “Regional wrongdoing can only be exposed by a national network. Local reporters are easily stopped by

the local lords—government officials, the rich, and local crime rings.” The methods of corrupting journalists have changed. Bribes are rarely delivered through direct financial payments but may come in the form of bestowing journalism awards for the wrong reasons.

OBJECTIVE 3: PLURALITY OF NEWS SOURCES

Bulgaria Objective Score: 2.50 / 4.00

Bulgarians have access to a wide variety of sources of reliable and objective news and information, and the MSI panel said there has been consistent improvement each year despite some relatively minor setbacks. The implication is that the country is open to the world and that this is irreversible and not to be affected by political and economic shifts.

One negative noted by the panel is the manner in which state media cover a variety of views and opinions but still cannot avoid partiality by producing programs

that support the government. At the same time, an increasing number of commercial outlets are investing in programs on issues of public importance. When Radio Free Europe/ Radio Liberty stopped funding its Bulgarian-language service in February 2004, it helped

“The radio market is undergoing a serious consolidation. A lot of loopholes in the law are being found in this massive change of ownership, as the sale of licenses is practically illegal. We are witnessing a process which has nothing to do with fair competition,” said Petko Georgiev.

establish the independent Bulgarian Radio New Europe, the country’s first all-news/all-talk radio station. Since its launch, the station has tripled its ratings and has developed a series of programs on corruption, reforming the judiciary, political reform, social issues,

Multiple news sources provide citizens with reliable and objective news.

PLURALITY OF NEWS SOURCES INDICATORS:

- > A plurality of affordable public and private news sources (e.g., print, broadcast, Internet) exists.
- > Citizens’ access to domestic or international media is not restricted.
- > State or public media reflect the views of the entire political spectrum, are nonpartisan, and serve the public interest.
- > Independent news agencies gather and distribute news for print and broadcast media.
- > Independent broadcast media produce their own news programs.
- > Transparency of media ownership allows consumers to judge objectivity of news; media ownership is not concentrated in a few conglomerates.
- > A broad spectrum of social interests are reflected and represented in the media, including minority-language information sources.

and culture. New talk-show programs on social and political issues also were launched by bTV, Nova TV, Evropa TV, Channel 3, BBT Television, and others. Such outlets are providing a larger share of informational programming, compared with the public radio and television stations.

Panelists highlighted the insufficient level of transparency of media ownership. Bulgaria’s newspaper industry has a history of off-shore ownership, often hiding Bulgarian or Russian crime-connected money. Consolidation of the radio market during 2004 increased the degree of nontransparency in media ownership. Petko Georgiev said: “The radio market is undergoing a serious consolidation. A lot of loopholes in the law are being found in this massive change of ownership, as the sale of licenses is practically illegal. We are witnessing a process which has nothing to do with fair competition.”

The unclear status of media ownership makes outlets vulnerable to the interests of business, advertising, and political groups. In the print sector, the Westdeutsche Allgemeine Zeitung (WAZ) consortium retains its relative monopoly by controlling the two largest dailies in the country and a number of weekly and monthly publications. Its dominance has expanded from

publishing to the distribution of print advertising. Zoya Dimitrova, deputy editor-in-chief of *Politika* and head of the Investigative Journalism Foundation, said: "There are regulations to ensure a free-market environment for the media, but they are not properly applied. One example is WAZ and the failure of the Anti-trust Commission to impose any restrictions. The outlets outside of the WAZ group are in an unfavorable position."

Citizens' access to domestic and international sources of information is not restricted by the government, nor is it likely to be. A 2004 study conducted by the Alpha Research polling agency showed an increase in the number of Internet users to 21 percent. TNS/TV plan data for 2004 indicate that 67 percent of households subscribe to cable television. Both stand as positive trends. However, the low levels of computer literacy and language proficiency limit the general public's access to otherwise available sources of information.

There was no change in the development of the minority-language media. Such media products are available, but their distribution is limited due to fragmentary demographics and language constraints. The Turkish-language news bulletins of BNT, though not generally welcomed at the beginning, enjoyed a more tolerant environment during 2004.

OBJECTIVE 4: BUSINESS MANAGEMENT

Bulgaria Objective Score: 2.82 / 4.00

Bulgarian media continue to develop as effectively managed businesses while providing guarantees for editorial independence. Advancement appears stable, and, over the course of recent years and under different governments, the Bulgarian media have developed as well-run business structures.

During 2004, the advertising market grew and improved its structure. According to polling-agency estimates, Bulgaria's total advertising market in 2004 reached €250 million, with 75 percent going to broadcast and 25 percent to print outlets. Advertising provided a sound source of revenue, but agencies were more active in working with television than radio. The radio advertising market is relatively weak due to the large number of stations in each market and the competition of cable television stations, which sell advertising at rates similar to those of radio. Meanwhile, print outlets sell most of their advertising directly. Legislation regarding advertising is generally observed. "The advertising agencies work well, but mostly with the mainstream nationals. They overlook the regional outlets, which are deprived of a share

Independent media are well-managed businesses, allowing editorial independence.

BUSINESS MANAGEMENT INDICATORS:

- > Media outlets and supporting firms operate as efficient, professional, and profit-generating businesses.
- > Media receive revenue from a multitude of sources.
- > Advertising agencies and related industries support an advertising market.
- > Advertising revenue as a percentage of total revenue is in line with accepted standards at commercial outlets.
- > Independent media do not receive government subsidies.
- > Market research is used to formulate strategic plans, enhance advertising revenue, and tailor products to the needs and interests of audiences.
- > Broadcast ratings and circulation figures are reliably and independently produced.

of the advertising budgets even in massive national campaigns," explained bTV news director Luba Rizova.

While the major Bulgarian media have a variety of revenue sources, including programming sales and advertising, regional and local outlets faced more serious problems during 2004. Many had trouble attracting advertisers, and the lack of revenue undermined their editorial independence.

The three television stations with national coverage—bTV, Nova, and BNT—share more than 98 percent of the

"The advertising agencies work well, but mostly with the mainstream nationals. They overlook the regional outlets, which are deprived of a share of the advertising budgets even in massive national campaigns," said Luba Rizova.

total television advertising revenues, leaving 2 percent to the more than 150 licensed national, regional, and local cable, broadcast, and satellite channels. The radio market, much smaller in size, is more evenly distributed but is dominated by national broadcaster Darik Radio, BNR, and several national networks.

The development of the advertising market has led to more effective and professional approaches to audience measurement. Pollsters and audience meters offer more reliable products to both the media and the advertising agencies. The domestic people-meter system improved but still was not fully reliable and lacked competition during 2004. Some panelists questioned the accuracy of the data, as well as its objectivity because of an alleged connection with agency and media owners. This link is a direct result of the inadequate transparency of media ownership.

“Generally, publishers are quite secretive about circulation figures. Even with only one state printing house in the past, circulations were kept in secret. With the facilities in private hands now, circulation figures are quite arbitrary. WAZ, for example, has never officially disclosed circulation,” explained Zoya Dimitrova.

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now, circulation figures are quite arbitrary. WAZ, for example, has never officially disclosed circulation.”

The Bureau for Independent Audit of Circulation exists, but it is not fully functional. Some major print media are not members, and the information provided by the bureau is not seen as always representative or accurate.

Independent media do not receive state subsidies and are sustainable based on their own revenue streams. Several regional media are owned by their municipalities or receive partial support from the municipal budget.

The media distribution channels are well developed and efficient. The major print distribution firms are owned by the biggest publishers. Regardless, the nationwide distribution of any publication is quite efficient. Distribution problems result more from poor planning by the outlets than from obstacles set by the distribution companies. All newspapers are in private hands, and the state cannot interfere with content or distribution. Printing facilities are continually modernized.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Bulgaria Objective Score: 2.90 / 4.00

Supporting institutions have a solid foundation in the Bulgarian media sector. In 2004, as in past years, panelists indicated continuing improvement and a reasonable level of sustainability for supporting institutions. This improvement has remained unaffected by a number of changes in government.

A range of efficient Bulgarian NGOs support freedom of speech and independent media. Most of these institutions are united under the Bulgarian Media Coalition (BMC), an active champion of journalists’ rights and freedom of speech. They include ABBRO, the Access to Information Program, the Center for Independent Journalism, the Association of Cable TV, the Free Speech Forum, and the Union of Bulgarian Journalists. In recent years, the Union of Bulgarian Publishers has brought together most of the owners of big print media and played an important role in developing the media market. Gergana Jouleva, head of the Access to Information Program, said the key organizations “maintain dialogue with the government and press for more European behavior.” The groups worked during 2004 on drafting an amended broadcast law that would revamp the licensing process and resolve the lack of reforms in state-owned media.

Supporting institutions function in the professional interests of independent media.

SUPPORTING INSTITUTIONS INDICATORS:

- > Trade associations represent the interests of private media owners and provide member services.
- > Professional associations work to protect journalists’ rights.
- > NGOs support free speech and independent media.
- > Quality journalism degree programs that provide substantial practical experience exist.
- > Short-term training and in-service training programs allow journalists to upgrade skills or acquire new skills.
- > Sources of newsprint and printing facilities are private, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

Institutions protecting the interests of media owners and private publishers began to emerge on the media scene in 2004. They expanded to adopt new members and reached out to smaller regional outlets. The Union of Daily Publishers was transformed into the Union of Print Publishers to encompass weekly newspapers and magazine publishers. Yovo Nikolov, an investigative journalist, contended that “protection of the interests of the industry and individual journalists remains relatively low. The industry is dominated by the media owners, and the level of editorial or individual independence is up to them. This is particularly true in the print industry.” Following the adoption of the Ethical Code of Bulgarian Media, the Union of National Media was established as a new organization designed to support the emerging ethics self-regulation bodies.

The media trade-unions remain the least developed support organizations. One of the older unions, the Union of Journalists of Bulgaria, ceased to operate entirely, while the Union of Bulgarian Journalists deteriorated further toward uselessness, held hostage to the political affiliations of some members. Panelists also pointed out that media professionals remain vulnerable to the lax labor law that offers them little protection.

Well-developed and efficient training programs are available industry-wide. Such programs use both domestic and international consultants. Two specialized facilities

offer high-quality training courses: the ProMedia Broadcast Training Center and the Media Development Center. These short-term and on-the-job training opportunities were more highly regarded than the academic journalism programs available in Bulgaria. The

quality of journalism education is mainly compromised by the lack of up-to-date and practical instruction.

In 2004, many private owners controlled printing facilities and media distribution channels. From this perspective, there are no formal restrictions on the free distribution and penetration of the media. The privatization of the Bulgarian Telecom Company in 2004 put an end to the state’s monopoly on telecommunications in general.

According to Yovo Nikolov, “Protection of the interests of the industry and individual journalists remains relatively low. The industry is dominated by the media owners, and the level of editorial or individual independence is up to them. This is particularly true in the print industry.”

Panel Participants

Rumiana Bachvarova, sociologist, director of Media Links Polling Agency

Boiko Stankushev, television reporter, talk-show host

Yovo Nikolov, Kapital weekly special correspondent, cofounder/board member of the Bulgarian Association of Investigative Journalists, cofounder of Transparency International, Bulgaria

Dimitar Sotirov, journalist, executive director of the Bulgarian Media Coalition (BMC)

Yassen Boyadjiev, Inforadio program director, cofounder/chair of the Board of Free Speech Civic Forum

Vessela Tabakova, professor at the Faculty of Journalism and Mass Communications at Sofia University, head of the Center of Independent Journalism (CIJ)

Petko Georgiev, executive director of BTC ProMedia, journalist and political analyst at Radio New Europe

Zoya Dimitrova, investigative journalist, board member of the Bulgarian Association of Investigative Journalists

Luba Rizova, director, bTV News Department

Ivo Draganov, documentarist, media expert, former media regulatory council member, professor at the Mass Communications Faculty, New Bulgarian University, Sofia

Gergana Jouleva, executive director, Access to Information Program

Moderator

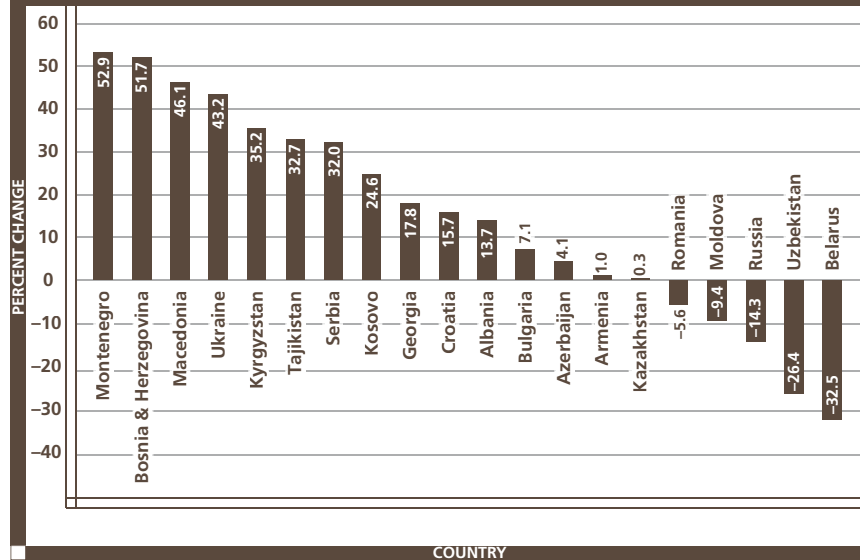
Rumiana Bachvarova, director, Media Links Polling Agency

BULGARIA AT A GLANCE

GENERAL

- **Population:** 7,761,049 *National Statistics Institute, 2004*
- **Capital city:** Sofia
- **Ethnic groups (% of population):** Bulgarians 84%, Turks 9.4%, Romas 4.7%, others 1.9% *National Statistics Institute, 2004*
- **Religions (% of population):** Eastern Orthodox 83%, Muslim 12%, none 3%, other 2% *National Statistics Institute, 2004*
- **Languages (% of population):** Bulgarian 84%, Turkish 9.6%, Roma 4.1% *National Statistics Institute, 2004*
- **GDP:** US\$61 billion at PPP; GDP per capita: \$8,200 at PPP *National Statistics Institute, 2004*
- **Literacy rate (% of population):** 99.1% *National Statistics Institute, 2004*
- **President or top authority:** President Georgi Parvanov, Prime Minister Simeon Saxe-Cobourg-Gotha
- **Next scheduled elections:** June 25, 2005 (general)

MSI AVERAGE SCORES—PERCENT CHANGE 2001–2004



MEDIA-SPECIFIC

- **Newspaper circulation statistics (total circulation and largest paper):** The total circulation of dailies is 668,000. *National Statistics Institute, 2004.* The circulation of *Trud* is 250,000. *GfK Bulgaria, 2004*
- **Broadcast ratings (top three ranked stations):** Television: bTV 38%, Nova TV 14%, BNT (state) 19% *TNS/TV Plan people meters, 2005*
- **Number of print outlets, radio stations, television stations:** There are 386 newspapers. *National Statistics Institute, 2004.* There are 250 radio stations and 187 television stations. *Council for Electronic Media*
- **Annual advertising revenue in media sector:** US\$52 million *TNS/TV Plan people meters, 2005*
- **Number of Internet users:** 900,000 *GfK Bulgaria, 2004*
- **Names of news agencies:** BTA (state), FocusNews, BGNes

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