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BULGARIA

The Bulgaria MSI score indicates sufficiently sustainable development in a number of aspects, but the negative tendencies are quite prominent, too. The 2010 scores decreased significantly—more than a third of a point from last-year’s score—to settle at the lowest level in the last six years. Bulgaria is meeting some of the key aspects of media sustainability, but signs are obvious of political and economic dependency. Problems have deepened in a number of areas.

On a positive note, sufficiently high sustainability levels were achieved regarding legal guarantees for the freedom of speech (Objective 1), supporting institutions in the media field (Objective 5), and availability of multiple news sources of reliable and objective news and information (Objective 3). Bulgaria had enough high-scoring indicators to suggest that it is consistently meeting some aspects of media sustainability. The indicators have registered a certain drop from the previous year’s scores, but overall development is believed to be irreversible and stable in these areas. For example, the media’s unrestricted access to international news and sources, the open and market-driven access to printing facilities, the liberal entry into the journalism profession, and the apolitical and unrestricted channels of distribution are among the undisputable achievements of Bulgaria’s development in the media sphere. The variety of news sources, the political pluralism in coverage, and the level of development of trade associations are sufficiently sustainable indicators as well.

But alongside the success stories, a number of aspects continue to be causes for concern. For these areas, not only is there no stable forward movement—they are deteriorating notably. Panelists still are especially critical of the way crimes against journalists are prosecuted, and they noted an increase in self-censorship. Inadequate pay levels for journalists, all too often attributed to the economic crisis, fail to discourage corruption. The performance of professional journalist associations, the transparency of media ownership, and fairness in broadcast licensing all registered below sustainable levels as well. Other problematic areas are the proportion of entertainment in programming and the quality of reporting.

The majority of low-scoring indicators are rated between 1 and 1.5, suggesting a step towards sustainability. However, the decrease (albeit minimal) in scores of those consistent underachievers corroborates the negative tendency.

Other notable developments raised by the Bulgaria MSI panelists include the role of online media and blogs in broadening the scope of free speech, the exposure of journalists from state media as former state security contributors, and roadblocks in broadcast licensing and digitalization.

The general conclusion about the state of the Bulgarian media environment is that it keeps within reach of sustainable levels and partially meets the key objectives. However, long-term and irreversible sustainability

BULGARIA AT A GLANCE

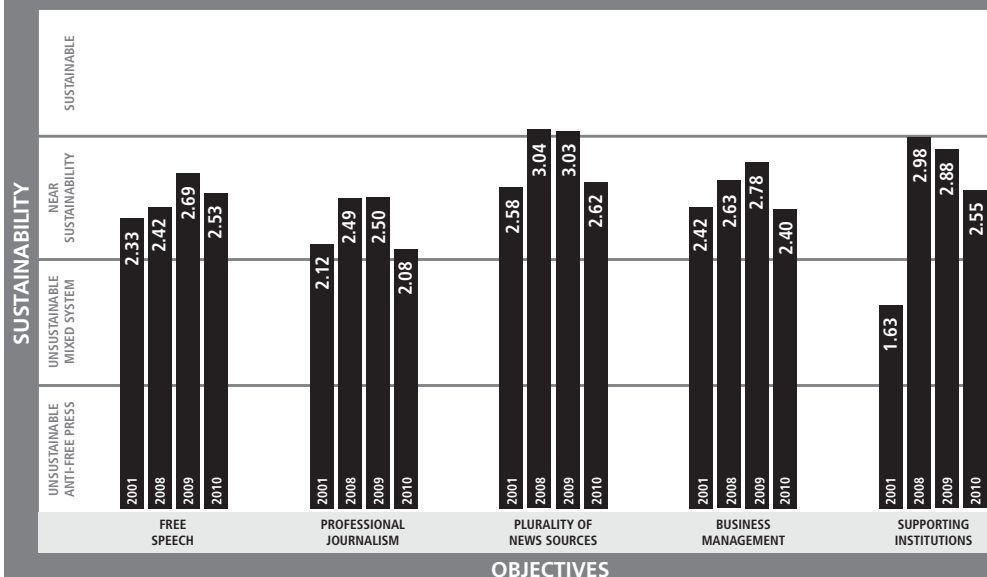
GENERAL

- > **Population:** 7,204,687 (July 2009 est., *CIA World Factbook*)
- > **Capital City:** Sofia
- > **Ethnic Groups (% of population):** Bulgarian 83.9%, Turk 9.4%, Roma 4.7%, other 2% (including Macedonian, Armenian, Tatar, Circassian) (2001 census, *CIA World Factbook*)
- > **Religions (% of population):** Bulgarian Orthodox 82.6%, Muslim 12.2%, other Christian 1.2%, other 4% (2001 census, *CIA World Factbook*)
- > **GNI (2008-Atlas):** \$41.83 billion (World Bank Development Indicators, 2009)
- > **GNI per capita (2008-PPP):** \$11,950 (World Bank Development Indicators, 2009)
- > **Languages (% of population):** Bulgarian 84.5%, Turkish 9.6%, Roma 4.1%, other and unspecified 1.8% (2001 census)
- > **President:** Georgi Parvanov (since January 22, 2002)

MEDIA-SPECIFIC

- > **Number of active print outlets, radio stations, television stations:** Print: 446 newspapers; Radio stations: 97; Television stations: more than 189 (National Statistics of 2006, Peiro97)
- > **Newspaper circulation statistics:** Total circulation: 400,000+, with the largest being *Dneven Trud* (circulation 70,000-100,000 daily) (Market LINKS)
- > **Broadcast ratings:** Top three television stations: bTV, NOVA, BNT, Channel One
- > **News agencies:** Bulgarian Telegraph Agency (public), BGNES (private), Focus Information Agency (private)
- > **Annual advertising revenue in media sector:** \$647 million (TVPlan/TNS)
- > **Internet usage:** 2,647,000 million (2008 est., *CIA World Factbook*)

MEDIA SUSTAINABILITY INDEX: BULGARIA



Annual scores for 2002 through 2006/2007 are available online at http://www.irex.org/programs/MSI_EUR/archive.asp

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.

is yet to be achieved in all critical areas. One of the most consistent symptoms is the undue influence on media of current political and economic developments, as seen in a number of indicators.

OBJECTIVE 1: FREEDOM OF SPEECH

Bulgaria Objective Score: 2.53

Under the first objective, related to the freedom of speech and access to information, some of the positive trends observed in previous MSI studies have reversed. The overall objective score decreased slightly, and most of the decrease is attributed to the persistent problems with broadcast licensing and the pressure on journalists and other members of the media. The positive notes here are the unrestricted media access to international news and sources, the liberal entry into the journalism profession, and the overall better access to public information.

With this objective falling only slightly, the general conclusion is that the country has the necessary legal framework in place to guarantee freedom of speech. However, the panelists expressed their concern that crimes against journalists do not spark a strong reaction from the public—negatively impacting the general media environment. The media and journalists are slowly but surely losing their roles as leaders of public opinion and champions of democratic reforms. As tabloids become more popular, journalism standards are declining, and some leading journalists working for big national television stations have been discredited as politically biased, corrupt, or connected to the secret communist police. As a result, public trust in the media has declined, and according to the panelists, many Bulgarians think that some journalists may well have provoked and deserved the attacks against them.

Bulgaria has solid legal codes, so the threats to freedom of speech center more on code implementation and an unsupportive environment. Noted Konstantin Markov, honorary chair of Association of Bulgarian Broadcasters (ABBRO), “The problem is not passing the legislation, but enforcing it. Up-to-date media legislation is needed. The new government is giving positive signs, but it will take a year to actually see the results.” Assya Kavrakova, director of the European Policies Program of the Open Society Institute – Sofia, added, “The legal and constitutional safeguards for the freedom of speech are in place, but the environment in which to exercise those rights is deteriorating.” For example, she said, “The Public Broadcasting Act [the BNT and BNR digital multiplexes] was passed in the dark, without consultation with professional organizations or citizens. It involves massive

public spending—taxpayer’s money. It unduly favors the national radio and television, on top of the state subsidies they’re getting.”

Ivo Draganov, a media management and regulatory expert, noted, “We have a broadcast law and—formally, at least—a regulator exists. However, the political majority can, at any time, pass amendments to the legislation, or replace the members of the regulator if they are politically inconvenient. The judiciary is not independent and was utterly discredited in recent months, when exposing illegitimate ties between magistrates and suspicious persons. High-ranking members of the judiciary initiated this exposure, which the mainstream media covered extensively.”

Draganov also noted that the government does not impose license restrictions on Internet and satellite programming, but the new communications act provides for heavy government control over digitalization.

The licensing of electronic media continues to be a major cause of concern. Accordingly, the indicator assessing the fairness of broadcast licensing dropped almost a half a point from last year’s score. Amendments to the communications act passed this spring raised many questions about licensing transparency, fairness, and the level of protection against political and business meddling. Observers fear that the government is going to be involved increasingly in the process, now that the licensing authority has been transferred from the regulator CEM (Council on Electronic Media) to the state CRC (Communications Regulation Commission). By definition, CEM is an independent body and its decisions are based on clear-cut criteria. CRC, on the other hand, is part of the public administration, which raises concerns about its political bias and lack of transparency. Many panelists said that they believe that this sets serious obstacles to digitalization. “The direct involvement of government in licensing is growing through the more prominent position of the CRC and the means for manipulating legislation in favor of certain media structures,” said Petko Georgiev, executive director of BTC ProMedia Foundation.

Draganov concurred, saying, “The situation is not improving. Members of the regulator are appointed by the president and elected by parliament. By default, their political affiliation is unavoidable. There is enough circumstantial evidence that the licensing procedure is not open and unbiased. Licenses are granted to media whose owners are well-connected politically, and not ashamed to show it off. The law sees to it that awarded licenses can be appealed, and there were even some positive examples of that. But as a whole, the general environment is one of political affiliations and dependency.”

The tax structure and market conditions for the media did not change remarkably in 2009. In a highly consolidated market, though, the effective legislative framework is in doubt—especially regarding competition and anti-monopoly issues. The general belief is that the law is more liberal than ever, paving the way to abuse of a dominant position. The consolidated market calls for a dedicated legal regulation. In addition, Draganov noted, “The acquisitions of media are solely regulated by the market. In fact, there are requirements in the Radio and Television Act [RTA] to prove the origin of funds, but there are ways around it.” Stoyana Georgieva, editor-in-chief of MediaPool.bg, added, “The legislation needs to be amended to favor a competitive and fair media market. For example, there are no obligations to disclose ownership, and the competition commission [an anti-monopoly body] is making biased decisions.”

Although 2009 saw no instances of physical violence against journalists, the judiciary continued to fail in properly addressing some previous cases. Other forms of harassment happen regularly, but are not reported—media owners and editors rarely take them public. Draganov brought up several examples. “Journalists are being threatened and assaulted. Journalist Ognyan Stephanov was severely beaten up [in 2008], and the investigation continues, to no avail; there are rumors of political motives behind the assault. The attack was professionally executed and Stephanov’s coverage was clearly critical of the president. Also, reporter Mira Benatova was knocked down by a raging businessman while investigating his illegal activities. A long, drawn-out lawsuit ended with

a light sentence in the first instance court, which was eventually appealed and overturned—just a few days ago. Investigative journalism is an ever-rare commodity, especially in broadcast media.” Draganov also shared a case regarding the State Agency of National Security and its alleged spying on journalists critical of the former government. He remarked that although the illicit investigations were exposed, the public was not outraged; only the journalism guild reacted.

Additionally, in Varna, there was a case of alleged corporate pressure on outlets. Local journalists and local correspondents of national media publicly refused to report the side of a local NGO that confronted a big business willing to invest in the city’s public park. Events like this, and stories continuing to break about governmental spying on journalists, add to the negative trend in 2009 and explain the decreased scores under this objective.

The indicator measuring the public media’s editorial independence remained the same as in last year’s MSI. The Bulgarian national radio and television are believed to not have pushed through any political or business agenda in their program. The guaranteed state funding has shielded the public operators from the negative consequences of the economic crises and given them the means to carry out their public function. Still, Draganov said, “I am absolutely certain that Bulgarian National Television [BNT] has no editorial independence. It’s common knowledge that the BNT general director is close to the president, and he is getting air time with and without reason.” Draganov added, “We must note: The RTA acknowledges that the program obligations of public broadcasters involve higher production costs, and they’re still entitled to half the advertising revenue of commercial broadcasters—six minutes per hour, against 12 for commercial broadcasters.”

The indicator score for libel decreased significantly in 2009. The government continues to charge journalists with libel—especially in regional media, which are critical of the municipal and local authorities. The law allows claimants to push for and obtain a penalty fee; the procedure is very liberal and involves no litigation fees. As a result, lawsuits against journalists are frequent, and the government can misuse the law as means of pressure against media and journalists. Draganov commented, “The offended party must prove falsity, of course, and there are cases of conscious slander. Corruption is unverifiable—everyone knows corruption exists, and no one has been convicted.” He also provided the example that police are keen recently to investigate Internet providers. The authorities pressure Internet providers to reveal information, including IP addresses and content.

LEGAL AND SOCIAL NORMS PROTECT AND PROMOTE FREE SPEECH AND ACCESS TO PUBLIC INFORMATION.

FREE-SPEECH INDICATORS:

- > Legal and 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 offended parties 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.

The law guarantees access to public information, and the panelists noted that media outlets are growing more proficient at exercising their right to request and obtain the information they need. Government institutions are still not responsive enough, though, and try to obstruct access to information without formally breaking the law. The panel noted the government's online publication of the transcripts of cabinet meetings as a positive move that heralds a new standard of government conduct. Draganov said, "Overall, institutions hate publicity and transparency, but whether it takes patience or legal action, they are slowly learning to respect the rights of journalists and citizens."

The last two indicators of this objective consistently score high, suggesting a sustainable level of development. The media's access to international news and sources, and the free entry into the journalism profession, have always contributed positively to the Bulgarian media sector. This is true even in rural areas; most media outlets are able to use free international news available on the Internet and the numerous free Bulgarian online news sites.

Entry into the profession continues to be free. Draganov commented, though, that "the former government used to favor certain journalists and media—the national radio and television, for example, for being most cooperative. As a whole, the government has no say on journalism training and recruitment. Still, the presidency and [former] government can influence the staffing policies at the national radio and television, and even some commercial media where they are well connected."

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Bulgaria Objective Score: 2.08

The objective on quality, fair, and objective coverage sustained a considerable decrease—nearly half a point. Panelists observed a general drop in journalism quality in Bulgaria. Journalists do not always respect standards such as checking facts and presenting a variety of viewpoints, and their subjectivity taints reporting on some topics. According to the panel, the journalism community is well aware of journalistic standards, but often editorial policy bypasses them. The media seem to be influenced by the public mood regarding certain public figures and fail to keep the necessary distance and neutral view; media outlets are struggling to be popular, not necessarily objective. In politically active 2009, two nationwide election campaigns were held, and political groups made a number of attempts to influence the media. Georgieva commented, "Standards of quality are lowering. The media are misused and manipulated by corporate and

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political forces to push a certain agenda. Even state security services are getting actively involved."

As one of the few positive aspects within this objective, the leading television stations invested considerably in improving their newscasts and current affairs programming, which resulted in higher production quality, panelists noted. Several channels have launched new newscasts and current affairs programs. "Quality journalism is mostly pursued in the big television channels," Draganov said. "They try to be objective, but in 90 percent of the cases, they don't get enough editorial support—hence the lack of quality commentary and analysis." All leading television stations upgraded their equipment, while simultaneously investing in training and technology.

Several reasons factored into the significant drop in score for the indicator assessing how well journalists follow ethical standards. According to the panel, the lack of active citizen participation in monitoring the work of the media obstructs the work of the ethics committee, to an extent. Self-regulation mechanisms are often used as leverage in

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 media does not resist the rising trend of ethnic intolerance and discrimination against difference,” Georgiev noted.

squabbles between competitors. The panelists said that they believe that journalists commonly accept gifts, compromising the credibility and quality of journalism, and panelists suspected that some media corporations’ favorable treatment through questionable contracts reaches to the highest levels of government. Practically all big media outlets, both print and broadcast, have been given government contracts to cover specific policy areas under the former government’s “communication strategy.” These contracts resulted in more extensive and favorable coverage of the work of ministries and government agencies. However, the new government, elected in the summer of 2009, discontinued this practice.

Bulgarian journalists have a set of ethical guidelines to follow. “Formally, the Code of Ethics of Bulgarian Media was adopted four years ago, based on the BBC values,” Draganov noted. Despite the fact that all mainstream media outlets participated in the development of the code and adopted it, he said, “I can’t really say the print media observe it at all; while the broadcasters make mistakes out of ignorance. I sat on the first Ethics Committee for three years and saw the cases and issues firsthand. It’s all based on hearsay, but the personal wealth of some journalists, their rapid enrichment is perhaps the motivation.” Draganov said that most television stations have adopted the code, but “...in general, the cases examined by the Ethics Committee reveal a lack of awareness of key journalism standards.”

Ivan Mihalev, a journalist from *Capital Weekly*, said, “The quality of journalism is in decline—due to the economic crisis, but also as a result of neglected ethical standards and poor media practices. The media are hostage to political (to some extent) and business (to a greater extent) interests. There’s always someone’s agenda to push and serve the audience under the guise of news.” He noted that the misuse of the media in this respect is creeping into primetime, playing a more prominent role in political morning shows and high-profile current affairs programs.

Draganov brought up ethics in blogging, and noted that with blogs, the responsibility is personal and thus the extent to which they adhere to ethical standards is hard to judge. Mihalev, however, remarked that the growing reach and authority of Internet blogs is good news for Bulgaria’s media scene. “This kind of journalism is setting an alternative agenda,” he said.

Self-censorship increased markedly in the past year, as reflected in the MSI score for the related indicator. Several factors drove this decrease. The economic crisis undoubtedly played a negative role; financial pressure steered editorial policies in a bid to avoid confrontation with certain political and corporate interests. Media are thus at risk of becoming mouthpieces for hidden agendas, and the watchdog role of the press is undermined. “The economic crisis affects the media and their business performance,” Kavrakova said. “As a result, their editorial independence is weakened, and the media are potentially vulnerable to political and economic influence. This favors a manipulated ‘unreal’ agenda, which excludes coverage of some topics. The lack of funding also limits ‘serious’ journalism (investigative, current affairs, and commentary) and ushers in the domination of objectless entertainment.”

Draganov agreed, saying, “Editors are expected to conform to the wishes of the owners. Not all of them, of course, but those who have an opinion and stand by it are usually out of a job. The list of unemployed journalists reveals that some of the most prominent professionals are not welcome in any television channel. Some of them run their own blogs, so they still have a say on current affairs.”

The notorious spying scandals also added fuel to the fire this past year. “Journalists and public figures have the sense that they are being spied upon, and that instills fear and boosts self-censorship,” said Assya Kavrakova.

Panelists criticized media coverage of key events and issues as well. They generally agreed that the rising political and economic pressure affect the scope and depth of coverage. This is particularly problematic in small regional markets. Outlets that criticize local governments are bullied and risk losing advertisers. The same mechanism promotes self-censorship—political and corporate forces are in a position to distort the public agenda by “filtering” certain events and topics or by pushing marginal issues to the fore. Security services are believed to play an active role in this respect as well. Attempts to distort coverage are alleviated to an extent by independent blogs, which continue to report and comment on key events and topics.

Draganov saw connections between the economic and political influence in this regard. “As a whole, coverage is comprehensive enough. The problem is not with editors—it is the actual environment, the context. Media owners are solely driven by their economic interest. And in Bulgaria, the economy is a function of politics and convoluted political ties and dependencies. This inevitably affects the media too, with minor exceptions. Blogs, on the other hand, try to add some comment and analysis to the whole picture,” he said.

Ekaterina Aneva, a Nova TV producer, said that newsworthiness does not typically drive coverage in Bulgaria; the agenda is set by the powerful, and misleading reporting can result. She remarked, “Covering the world financial crisis is a good example. For the better part of the year, while the former government was in power, headlines used to claim Bulgaria was not to be seriously affected, because our economy was not developed enough to fear the consequences. Experts were out-voiced by political talk, forecasts were positive—no bankruptcies, no double-digit unemployment. Groundbreaking ceremonies were held for large-scale, expensive projects, like the second nuclear power plant in Belene.”

Dilyana Kirkovska, senior expert of the Council for Electronic Media Monitoring, agreed. “The media agenda doesn’t always match the society’s agenda. Investigative journalism is less prominent in television programs (Nova TV is good example in the passing year). Quality journalism is more and more confined; positive examples are mostly in the print media,” she said. Mihalev added that Internet media outlets are beginning to earn more respect and have more of a voice in shaping the society’s agenda.

Pay levels are very inconsistent across the media landscape—the big commercial and public outlets cannot be compared to small, regional media. Employees of large television channels and national dailies are considered very well paid compared to the overall labor market. However, few journalism graduates actually pursue a career in media; they are frequently keen to move to better paying jobs—in PR, for example. Overall, Bulgaria has a deficit of quality professionals, and in the view of the panelists, higher pay in bigger outlets has not made journalists there less susceptible to corruption. These reasons all contributed to this year’s drop of more than a half a point for the indicator addressing salaries and corruption. Regarding the impact of the economic crisis on salaries, Alexander Kashamov, a lawyer with the Access to Information Program, observed, “Pay levels are dropping due to the crisis, but perhaps it’s the crisis that has prevented a massive outflow from the journalism profession.”

Panelists noted that the trend toward entertainment programming and away from news continues to rise. The television channels with the largest audiences continue to push entertainment formats, along with increasingly popular Turkish telenovelas, to their primetime slots. Even serious issues and topics of public significance are often approached from an entertainment angle, placing the focus on the private life of the newsmakers. Furthermore, it is increasingly common to find PR disguised as news coverage “with publicity stunts filling most of the weekend newspapers,” according to one panelist. Draganov commented, “The audience wants to be entertained, and the battle for ratings

is fierce. The problem is the refusal to think—only two to five viewers are interested in current affairs comment and analysis. On the other hand, analysts and presenters fail to offer quality and in-depth content.”

The panelists rated production and newsgathering equipment relatively well. However, they pointed out the inadequate SNG and live capabilities of Bulgarian television channels and the affect on quality and quantity of live coverage. According to one panelist, “Even specialized all-news channels do not have the necessary means to report live.” Digitalization is also posing new equipment challenges.

Panelists’ evaluation of niche reporting did not change significantly in 2009. The prevailing opinion is that the negative trends have inevitably affected the quality of specialized reporting, too, including investigative journalism. “Most television channels are not willing to invest time and money into investigative journalism. Some smaller channels don’t even have enough editors—one for the day at most; one responsible for all current affairs,” commented Draganov.

Big outlets can afford to support and develop beat reporting, while small regional media are limited in both their scope and workforce. “Those who can afford it have better reporting. Reporters, especially those specialized in a certain subject, are actually the most respected and recognized media professionals,” Draganov said. Aneva had a slightly different opinion. “Beat reporting is developed enough in news: this is essential for objective and quality coverage. The problem is perhaps that the majority of beat reporters are trained journalists, with no additional qualifications and expertise in the subject they’re covering,” she said.

OBJECTIVE 3: PLURALITY OF NEWS

Bulgaria Objective Score: 2.62

The lower scores for this objective reflect the diminishing diversity of sources of news and information. One of the negative consequences of consolidation is the inability of the audience to discover and compare a variety of viewpoints. In the radio market, the growth of national networks leads to broader programs that overlook local issues. On the other hand, often local governments and corporate forces pressure the remaining regional outlets—another factor that works against a diverse and pluralistic media environment. At the end of the year, one of Bulgaria’s few exclusively news and information channels, which was deemed as an active opinion maker, ceased operations.

Georgieva cautioned, “The variety of sources does not imply a more reliable and objective information, and the number

According to Aneva, "Public television is obsolete and the last thing to say about it is it serves the public interest. The commercial media, in turn, are keen to meet the government litmus test and will push the issues and viewpoints that serve the ones in power. And pressure is not necessarily involved."

of sources does not effectively mean pluralism of opinion. The deteriorating quality of commercial media helps the public outlets stand out as 'islands' of more normal and balanced coverage." In addition, Georgiev noted, "The variety of sources is an actual advantage to very few active information seekers. People are driven by habit and rely on the few national television channels and daily papers, which are not always covering all the big issues and events." According to Aneva, "Online media try to challenge the media status quo. But they were quickly 'disciplined' by way of physical threats."

Access to domestic and international media is free and unrestricted. The expanding reach of Internet and cable television brings an ever-greater number of media sources to the public. The emergence of new Internet information portals and growing blogging activity have widened the scope of free speech and enriched the Bulgarian media landscape. Panelists said that they consider the trend to be

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.

sufficiently sustainable, and the indicator scores reflect that sense. While income affects the ability to access purchased information sources, Draganov said, "They are generally affordable and cost is not a limiting factor. There are no restrictions of any kind. The problem is the public opinion is not important for politicians and even a well-informed society fails in its watchdog function."

Panelists gave mixed scores to the level of editorial independence and the pluralistic media landscape. Two trends stand out regarding the functioning of public media. Some experts believe that politics do interfere occasionally in the work of the state radio and television. Others noted that BNT successfully maintained balanced and pluralistic coverage in the politically dynamic 2009. Another positive tendency is the increased share of current affairs programming and coverage of publicly significant issues and national policies. The scope of the BNT coverage has partly made up for the shortage of similar content in commercial outlets. "Sadly, the regulator does not require any kind of public service programming from commercial outlets," Draganov noted. "As a result, one particular television channel is brainwashing the audience into stupidity for the sake of catching up and beating a competitor."

Several panelists said that public media are too subject to shifts in political leadership to be considered independent. According to Aneva, "Public television is obsolete and the last thing to say about it is it serves the public interest. The commercial media, in turn, are keen to meet the government litmus test and will push the issues and viewpoints that serve the ones in power. And pressure is not necessarily involved. Sometimes media owners will do what they think best serves their economic interest."

Draganov agreed. "Public media are not independent; people who work there serve the politicians in power. In the last 20 years, there have been five major clean-ups by rotating governments. Essentially, whoever comes in power tries to place loyal people in the BNT and BNR. Public media are not influential and do not have credibility. Maybe they do only for the people in small communities, who have less or no access to alternative media. Their current affairs, education, and culture programming is there but its quality is questionable. To some extent, the National Radio could be the positive exception," he said.

Independent news agencies, with their gathering and distribution of news, represent a near-sustainable aspect of the Bulgarian media. Although the smaller media rarely can afford the services of a wide selection of information agencies, free Internet resources provide a certain way around this obstacle. Tzveta Nenova a journalist with Arena Media, noted, "Local outlets use one or two agencies,

mostly domestic, and mostly their text wire service. Internet is largely viewed as a free source of information, both for text and images. Newspapers often publish photos, quoting the Internet as the source. Local outlets will rarely pay for information—they either do not have the habit or the funds.” Some panelists questioned the objectivity of private news agencies, due to owners’ alleged corporate and political dependency.

One sustainable characteristic of the Bulgarian media is that independent broadcast media produce their own news programming. Most national television channels and radio stations have newscasts with adequate production standards. The slight drop in the score of this indicator for the past year can be attributed mostly to the overall decline in media quality. Draganov commented, “As a rule, every outlet produces its own news programs; using or buying foreign news programs is not widespread. Local outlets cover local issues—all international news in television stations is based on agency video feeds, and there are no restrictions on the access to news sources.” Nenova noted another news broadcasting method: “Local cable channels with their own news programs copy Euronews and BBC video feeds, get them translated, and air them without paying.”

Lack of transparency in media ownership consistently challenges the sustainability of Bulgarian media. As Kavrakova commented, “There hasn’t been much change under this indicator. Vague ownership continues to be a problem, and editorial policies are inevitably affected.” Although the Radio and Television Act explicitly requires disclosure of ownership, extending as far as nominal share certificates, the actual owners of large broadcast and print outlets, as well as a number of online media, remain shrouded in secrecy. The most notable example is a conglomerate that has been buying media for the last two years. Panelists agree that the business interests and political affiliation of media owners shape their outlets’ editorial policies, thus the outlets behave like auxiliary businesses.

On a different note, foreign investment in Bulgarian media is increasing, which leads to improved production quality and relative editorial independence. The establishment of a register of ownership of print media is a positive step, too.

Panelists gave a notably lower score to the spectrum of social interests reflected in the media in 2009. The media is marginalizing a wide range of minority topics, along with gender and sexual orientation issues, and they continue to drop out of the public discourse. Meanwhile, extremist political talk, and an aggressive stance against minorities and diversity in general, seemed to prevail in the media. “The media does not resist the rising trend of

ethnic intolerance and discrimination against difference,” Georgiev noted.

Nenova pointed out that the Bulgarian constitution does not formally recognize national minorities, and noted that the Turkish language news on national television continues to give rise to heated, but altogether futile, arguments for and against. She continued, “In the blogosphere, minority rights (ethnic, social, sexual) trigger discussions, which degrade into inarticulate name-calling. There is little to no quality coverage of those issues in the smaller, local media. Ethnic diversity coverage boils down to the depiction of old customs and festivities. Perpetrators’ or suspects’ ethnic identity is often emphasized when reporting on crime.”

Draganov said that the media are not wholly responsible for the problems in minority coverage. “It’s a complicated issue that boils down to the audience demand. In general, [audiences] are not interested in minority topics. Minority language media are not forbidden, but they simply have little to no audience. The talented Roma TV in Vidin did not last long, for the lack of viewers and advertising revenue. There are no formal restrictions, but the audience is perhaps not mature enough—it has no sensitivity and responsiveness to such issues. Our paradigm is still largely oriental, condescending of women, intolerant of difference, disrespectful of the intellectual. The pop-folk culture reveals our narrow horizon; the limited demand for art and culture.”

OBJECTIVE 4: BUSINESS MANAGEMENT

Bulgaria Objective Score: 2.40

Bulgarian outlets, especially the foreign-owned media, are managed professionally and have a good business and management base. “There are many well-managed outlets, which succeed in recruiting and keeping quality journalists. But there are opposite examples too,” said Dobrina Cheshmedzhieva, a BNT journalist. The lowered scores under this objective reflect the overall deterioration of the business climate in the country, which inevitably affects the media; smaller outlets are especially vulnerable. Panelists continue to be critical of the way funds are being spent by the public media, and said that public outlets are ineffective from a business point of view.

Most commercial media have adequate management systems, including business planning, human resources, marketing, etc. “Media are well-managed businesses as far as I can tell, Aneva said. “Collisions between economic interests and objective coverage do occur, though (journalists’

Draganov noted, "BNT doesn't make the best of its budget and is spending irresponsibly. Alleged mishandling of earmarked funds was under review in the parliamentary anti-corruption committee."

remuneration included). As a result, the media agenda sometimes fails to meet the actual agenda of the people." Georgiev added that many media outlets are owned by huge international corporations, and have adopted their standards, thus achieving better management quality and efficiency. Draganov noted the difference between small outlets and the large, national television channels, which make massive profits and are run according to widely accepted standards of management. "bTV is perhaps the epitome of this. Small cable channels are too weak and vulnerable, though. The lower segment advertising is regrettably overlooked and underdeveloped," he said.

With regard to BNT and BNR, their double sources of financing—from the state budget and from advertising—lead to decreased efficiency. Panelists still consider them to be overstaffed and inefficient. Draganov noted, "BNT doesn't make the best of its budget and is spending irresponsibly. Alleged mishandling of earmarked funds was under review in the parliamentary anti-corruption committee."

The major sources of revenue for commercial outlets are advertising and sponsorship. Bulgarian law regulates state

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.

funding of public media, but panelists said that government support still compromises their political independence. Outlets continue to receive federal and local government funding disguised under "media partnership contracts" and public relations services. By virtue of such contracts, some outlets receive government and accession funds for coverage of projects implemented by government agencies and institutions. Panelists said that they fear that this indirect source of revenue makes outlets dependent on state funding. "Against the background of crisis, when revenues are shrinking, giving public funds to the media to cover success stories puts editorial independence at risk and potentially results in bureaucratic institutional programming," Kavrakova said.

Kashamov brought up the local media's particular problems around financing. "Local media don't have adequate revenue. They're funded by paid announcements and publications on behalf of municipal authorities, especially during election campaigns, and these funds are not fairly and transparently allocated," he said. Mihalev commented that tabloids and sensationalist press have fared better, as they have enough circulation to better withstand the plummeting advertising revenue.

According to the panelists, the advertising market continued its sustainable development in 2009. Budgets are inevitably shrinking, but the general opinion is that this is a temporary condition that will soon alleviate. The market is diverse enough, both with affiliates of international advertising chains and domestic companies. The panelists had high praise for the professional level of advertising agencies. Their recently adopted code of ethics for advertising professionals is a sign of evolution and maturity. Suspicions still linger, though, about undisclosed and conglomerated ownership. In addition, the advertising market outside the capital and in underdeveloped communities is still immature. This is a major threat to editorial independence and often the sheer survival of regional outlets.

Regarding diversity in income sources, Kashamov said, "Advertising is the major source of media revenue. Subscriptions are less and less prominent—a fact that's corroborated by the free newspapers circulating over the past year." Draganov added that donations and sponsorship provide some limited funding. The problem with the dependency on advertising is that the better part of advertising budgets is concentrated among Bulgaria's big national television channels. In line with worldwide tendencies, Internet advertising revenue exceeded radio in 2009. Advertising is the key source of revenue for the major national dailies, too, while the tabloid press relies mostly on

circulation. The role of subscriptions continues to lessen, as most dailies offer free online access.

The maximum advertising time in broadcast media is regulated by law—12 minutes per hour in commercial media and six minutes per hour for the public media. This market is not transparent, though, and one can only speculate by how much it has shrunk in 2009, but in general people believe it is 30 percent down from 2008. There are no legal advertising limitations in print media, but newspapers have been hit heavily by the crisis, both in advertising and in circulations.

All media try to sell out their allowed air time of 12 minutes per hour. The advertising market is probably not enough to support all of the existing outlets. About 70 percent of the advertising budgets go to television, of which nearly 80 percent goes to the leading terrestrial channels.”

Market research is used widely to help determine which products to offer to audiences. Media and advertising agencies work with leading polling and research agencies—the proven model of international corporations investing in the Bulgarian media market. Panelists pointed out, though, that smaller outlets can hardly afford audience research and are inevitably less competitive. Nenova noted, “Independent marketing research and ratings are virtually unavailable locally—most outlets can’t afford them.” In addition, Draganov said, “The whole range of marketing tools is used to research the audience, so programming is tailored to demand. Research says entertainment is wanted, so no wonder such formats are pushing serious content aside.”

Panelists critiqued the credibility of circulation and ratings figures. Two major People Meters continue to work concurrently, but trust in both remains relatively low—one is questioned because of alleged corporate ties, and the other has limited market presence. Draganov explained further: “The BBC model is to use research agencies with no political affiliations and no interest in the advertising business. It’s hard to draw the line in Bulgaria, but there are some independent and professional agencies, too. All who can afford it have access to People Meter and circulation data.”

The Bulgarian media have two alternatives available for measuring Internet audiences, raising the market’s professional standards and helping advertisers optimize their campaigns. Not all print publications submit circulation figures, however, and no one has reliable data about the actual print market. Kashamov said, “As far as I know, there are too few rating measuring agencies, and that allows political and other interference. Circulation figures are no secret to the professional community, but aren’t publicly available.”

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Bulgaria Objective Score: 2.55

In 2009, trade associations in the media field, including the Publisher’s Union, ABBRO, and BARM (Bulgarian Association of Regional Media) demonstrated a sufficiently high sustainability level, providing representation and defending the interests of media owners. In the past year, trade associations lobbied effectively for legislative amendments concerning advertising, cross-ownership, and sponsorship. Despite competition and arguments between members, trade associations are actively and successfully lobbying the government in favor of commercial outlets. Draganov noted, “The professional community is committed enough. ABBRO and ABCO are quite efficient at identifying the industry-wide issues and defending their members’ interests before the government and regulators.” Georgiev agreed, saying, “The collapse of BMC has seriously undermined the media’s ability to engage in dialogue and actively communicate with government. In the meantime, ABBRO is living up to its name as a strong supporter and lobbyist for the commercial broadcasters.”

Bulgarian associations for media professionals and journalists are not very active and show a lack of commitment, and this continues to raise problems for the media’s sustainable development. The long-standing official Union of Bulgarian Journalists (UBJ) still exists, but is failing to gain broad credibility as the trade union of journalists and media professionals, largely because its membership base is still dominated by retired journalists and journalists from state-owned media. Worse, key union figures were exposed in 2009 as agents of the former communist secret police.

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 in private hands, apolitical, and unrestricted.
- > Channels of media distribution (kiosks, transmitters, Internet) are private, apolitical, and unrestricted.

According to Mihalev, “The community of media professionals has no representation in the face of a trade union. The traditional UBJ fails in this role, and journalists generally refuse to acknowledge it as the entity to speak on behalf of the community.”

Journalists continue to be underrepresented on labor issues and they do not have a united public presence. According to Mihalev, “The community of media professionals has no representation in the face of a trade union. The traditional UBJ fails in this role, and journalists generally refuse to acknowledge it as the entity to speak on behalf of the community. Efforts to survive the crisis have deepened the backbiting and exposed the weaknesses within the journalistic community.” Kashamov noted that the lack of an active journalists’ association is a problem especially in libel litigations and labor law cases.

Bulgarian civil society groups contribute to media development at near-sustainable levels. A number of NGOs, such as the Bulgarian Helsinki Committee (BHC) and the Access to Information Program, are involved in providing legal support to journalists. ProMedia and the Media Development Center also contribute to this sector. Overall, however, their commitment does not manage to meet all the legal needs of the professional community. NGO assistance is most needed for support of investigative journalism, legal training and aid for journalists, training in television news production, and development of new media. Most NGOs are actively involved in international projects and networking in favor of free speech. According to Draganov, “A few among the numerous NGOs actually live up to the standards of citizen activity and try to meet the needs of the media professional community. They try to carry on with the fading debate between civil society and government. Some of them offer legal support and are active in human rights litigations.”

According to Cheshmedzhieva, “The NGO sector is a lot more active and supportive than the professional associations on freedom of speech and access to information issues.” Kashamov agreed, saying, “NGOs like Access to Information and BHC are quick to react to encroachments of the freedom of speech and provide legal support to journalists. What we do is not enough though—for example, defense in court in libel lawsuits.”

Two of the Objective 5 indicators, regarding the professional training of journalists, are quite consistent in their scores, but sustainability is still out of reach. Though the professional qualifications of young journalists are improving, academic programs still fall short, according to several panelists.

“Unfortunately, the level of academic journalism programs is inadequate,” Draganov said. “They’re obsolete in terms of both form and content. Visual media are dynamic and develop rapidly; academic training fails to keep up.” Aneva agreed, saying, “Academic journalism training is a lot more questionable...My experience is that the new generation of journalists are less cultured, with poor language skills. They have little to no hands-on knowledge of television routine—on-camera performance, picture editing. They seem to lack the background to properly cover their stories.”

Mid-career journalists are most in need of training in basic reporting, investigative reporting, and beat reporting in crime, business, and social issues. But short-term training options have dropped, as media are less keen to spare staff. Training programs were much more robust in the past, when foreign donor funding was available, though ProMedia and the Media Development Center still offer training programs. As Nenova noted, “Following the retreat of USAID, there is almost no supply of short-term professional training. Occasional skill-building projects are available with European funding, but the projects seem to be preoccupied with their own objectives and fail to address the actual needs of the professional community. Locally, a new generation of young, unskilled, and uncritical media professionals is emerging.” Cheshmedzhieva confirmed that BNT is taking advantage of its EU-wide partnerships to offer its staff some skill building opportunities.

Printing facilities in Bulgaria are privately owned, and the government has no levers to control access to them. Panelists expressed concern about the active expansion of one media corporation, which is believed to be politically driven and influenced. The conglomerate has recently acquired a number of publications, along with one of Bulgaria’s biggest print houses, which serves a number of competing print media. As Draganov explained, “It is allegedly affiliated with MRF [Movement for Rights and Freedoms, a Turkish ethnic party]. It is too early to tell what will come out of it, but the conglomerate’s owners’ behavior is worrying, and that was repeatedly commented upon in the press.”

The media group in question is openly engaged in trading with influence, clearly biased politically, using the current crisis to buy more and more media outlets, and opaque regarding its sources of financing. According to the panel, formerly “serious,” well-established media outlets bought by the group changed their formats and decreased their editorial standards.

List of Panel Participants

Ekaterina Aneva, journalist and producer, Nova TV, Sofia

Yassen Boyadzhiev, editor, MediaPool.gb, Sofia

Dobrina Cheshmedzhieva, journalist, Bulgarian National TV, Sofia

Ivo Draganov, media management and regulation expert, Sofia

Stoyana Georgieva, editor-in-chief, MediaPool.bg, Sofia

Petko Georgiev, journalist and producer, BTC ProMedia Foundation, Sofia

Alexander Kashamov, lawyer, Access to Information Program, Sofia

Assya Kavrakova, director of the European Policies Program, Open Society Institute, Sofia

Dilyana Kirkovska, senior expert, Council for Electronic Media Monitoring Directorate, Sofia

Dimitar Lipovanski, journalist and producer, Russe

Konstantin Markov, honorary chair, Association of Bulgarian Broadcasters, Sofia

Ivan Mihalev, journalist, *The Capital Weekly*, Sofia

Tzveta Nenova, journalist, Arena Media, Russe

Moderator and Author

Dobromir Zhivkov, analyst, Market Links Research and Consulting, Sofia

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