

**MEDIA**

**SUSTAINABILITY**

**INDEX**

**2005**



**IREX**

MEDIA DEVELOPMENTS IN 2005 WERE MARKED BY THE IMPACT MEDIA HAD ON THE GENERAL AND MUNICIPAL ELECTIONS AND BY THE INCREASED COMMERCIALIZATION OF THE MEDIA. THE STRONG SHOWING OF THE "ATAKA" MOVEMENT IS PARTIALLY BLAMED ON THE INFLUENTIAL PRESENCE OF ITS LEADER, JOURNALIST VOLEN SIDEROV OF STATE-OWNED NATIONAL TELEVISION, AND ON HIS OWN TELEVISION PROGRAM ON ONE OF THE NATIONAL CABLE CHANNELS.



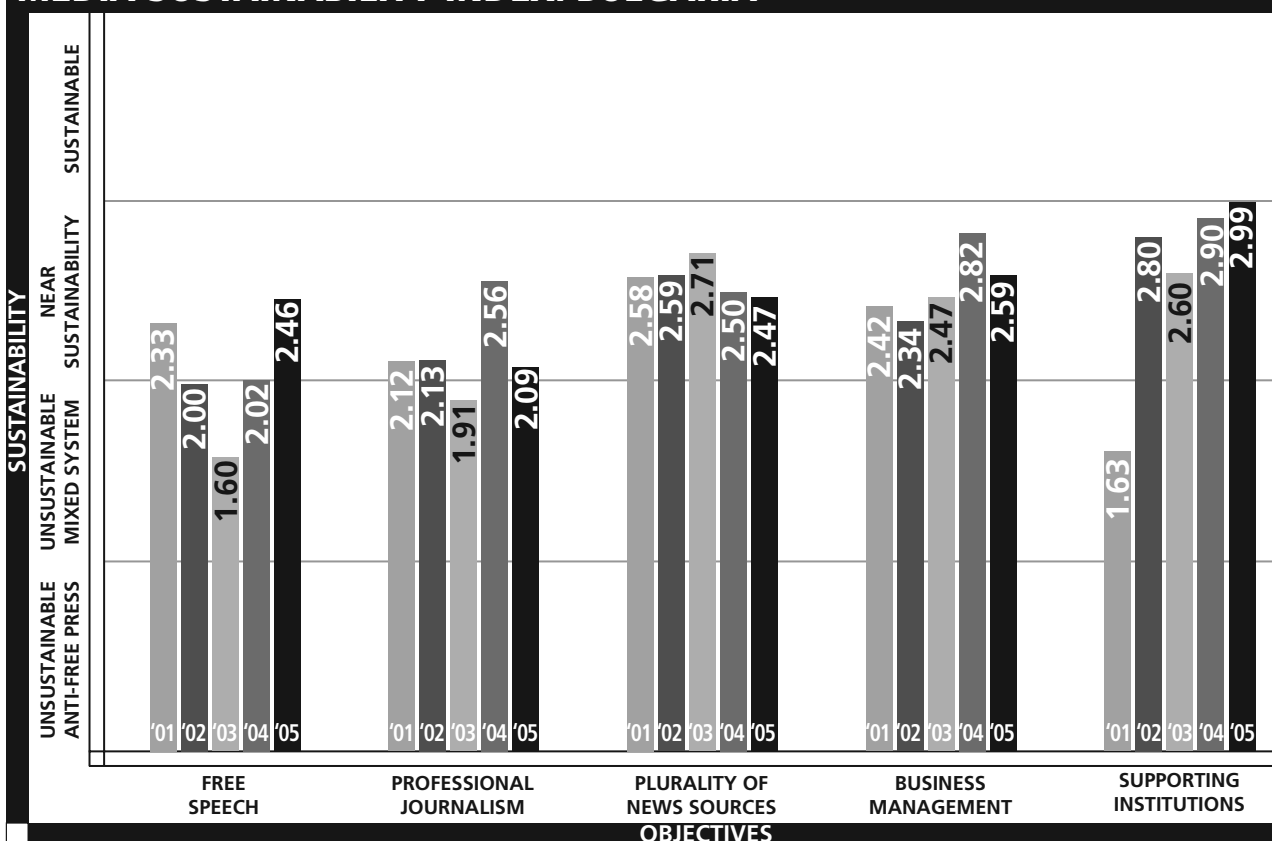
**B**ulgaria is in a final and decisive stage of its full integration into the community of democratic nations. In April 2005, the country signed an accession agreement with the European Union (EU) and is scheduled to become a regular member on January 1, 2007. Improved rule of law, judicial reforms, control of corruption, and the increased capacity of public administration are among the major areas in which Bulgaria needs to make rapid progress in order to avoid possible delays with EU membership. The EU and its individual member states will make a final decision on the date for Bulgaria's membership by the end of 2006.

After the general election of June 2005, Bulgaria is governed by a three-party coalition consisting of the Bulgarian Socialist Party (former Communists), the former king's party (National Movement Simeon the Second [NDSV]), and the Turkish minority party (Movement for Rights and Freedoms [MRF]). The government, led by Socialist leader Sergey Stanishev, has an unprecedented majority in parliament and is pledging full support for EU membership and the reforms needed to achieve it. On the other hand, the country has been slow in implementing reforms in several key areas (judicial reform, minority rights, anticorruption measures), which may slow its European accession.

A series of demonstrative mob-style killings, including the murder of one of the richest Bulgarian bankers, has underscored the threat organized crime poses to the rule of law in the country. In addition to the threat of slowing reforms, the strong showing of the far right nationalist movement "Ataka" (Attack) has stirred racist and xenophobic emotions that were virtually unknown in Bulgaria. The country's model of ethnic tolerance has been put to the test by the rise of anti-Roma feelings and ethnic-based violent attacks between ethnic Bulgarians and Roma across the country.

Media developments in 2005 were marked by the impact media had on the general and municipal elections and by the increased commercialization of the media. The strong showing of the "Ataka" movement is partially

## 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.

blamed on the influential presence of its leader, journalist Volen Siderov of state-owned National Television, and on his own television program on one of the national cable channels. Another populist, former police Chief Boiko Borisov, successfully used his media-generated popularity to win the mayoral elections for the city of Sofia. From the perspective of the media industry, 2005 was marked by further growth in the advertising market, an increase in commercial content dominated by “reality” shows like the first Bulgarian edition of “Big Brother,” and the increased concentration of media ownership.

Bulgaria maintained a consistent level of media sustainability, as 2005’s Media Sustainability Index (MSI) scoring suggests. Despite the increase in some objectives, such as legislative guarantees for the freedom of speech and access to information and the institutions supporting the independent media, unresolved issues continue to slow Bulgaria’s advance toward a higher level of sustainability. For example, the scores indicate that the media sector is still too dependent on current political and government processes.

Despite low scores, the problematic indicators in 2005 have gone up compared with previous MSI surveys. This indicates that despite the obstacles, a process is likely to have begun that could lead to a higher level of sustainability. Maintaining 2004’s values in 2005 shows that the country is set on a stable course. The development may not be sufficient to move the country into a higher level of sustainability, but it reflects the positive features of the process of media development in Bulgaria.

**OBJECTIVE 1: FREE SPEECH**

**Bulgaria Objective Score: 2.46 / 4.00**

In 2005, the level of legal and social norms protecting free speech indicates that Bulgaria has begun to move toward sustainability. However, this sustainability is not yet proof against interference from political and government forces. According to Rosita Popova, a board member of the Union of Bulgarian Journalists, “There’s a drive toward establishing legal norms for the media, but their implementation is inconsistent. We have a rule of economic compulsion, affecting the independence of the outlets.”

The country’s advancement in the legislative and social aspects of media development is mirrored by an almost half-point increase in objective scoring. Several factors determined the panelists’ favorable assessment:

the relatively undisturbed work of public media, the increasingly lively and diverse media market, and the absence of incidents undermining freedom of speech and media independence. All of the important indicators of

this objective have scored higher than in previous MSI surveys, registering a trend of positive development.

The access to international sources of information has remained unrestricted and problem-free. In fact, the highest—near maximum—rating in 2005 was again given to this indicator. The media in Bulgaria have practically unchecked access to international

***According to Rosita Popova, a board member of the Union of Bulgarian Journalists, “There’s a drive toward establishing legal norms for the media, but their implementation is inconsistent. We have a rule of economic compulsion, affecting the independence of the outlets.”***

**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.

***“Our society lacks the awareness and is not conscious of freedom of speech,” stated Vessela Tabakova.***

sources. This is a sustainable pattern over the course of recent years.

There are no particular impediments

to entry into the journalistic profession. However, the unimpeded entry into journalism is sometimes regarded as a setback, as it is believed to compromise the quality of journalistic output, especially at regional outlets. In such cases, these outlets are recruiting young and untrained new staff. Many of them are willing to make personal and professional compromises to keep their jobs.

Another positive development in 2005 is the more favorable market setting for the media, resulting from the general improvement in all business areas. The country’s economy has been growing steadily for the past eight years. In 2005, Bulgaria signed its accession agreement with the EU, further increasing investor confidence. The advertising market is also rapidly expanding, and tax structures are not restrictive on media.

Forward movement was also registered regarding the journalists’ access to public information. Journalists have improved their skills in seeking information from state institutions, which in turn are more and more aware of their responsibility to provide information. The increased awareness of the Access to Public Information Act by the public and the media has helped Bulgarian journalists more successfully request information from state institutions. Another positive result has come from the increased publicity generated by lawsuits against institutions that refuse to provide requested information.

Despite stable development in key areas, the licensing process is one aspect that is still lacking sufficient growth. The total absence of licensing over the past few years has placed the legitimate licensees at a disadvantage against outlets that broadcast without undergoing the official procedures. Station ownership can only change hands by acquiring already existing operators or by obtaining temporary broadcast permits. Most of the temporary permits have long since expired, but because no new licenses are being awarded, the permits are still considered valid. This results in a kind of licensing that circumvents legal provisions instead of adhering to them. As a result, the previously licensed outlets have a disadvantage against those transmitting without a license. “What we

lack is professionalism and clear-cut rules. Numerous outlets (radio and television) are operating with temporary permits, and many are the outspoken pirates. Deregulation was taken to extremes,” explained Juliana Toncheva, a member of the Council on Electronic Media.

Licensing had been stopped since 2001, when parliament passed amendments in the Radio and Television Law requiring the adoption of a strategy for the development of broadcasting before any new licenses were issued. In 2005, this strategy was finally adopted by the government and submitted to parliament, which opens the way for renewed licensing. While the formal removal of the moratorium on licensing is still not reality-tested, it is an encouraging sign going forward.

The punishability of crimes against journalists was also considered problematic. It would be fair to say that there are no drastic transgressions against journalists, but on the other hand, crimes against journalists fail to provoke public indignation. This is possibly because pressure against journalists—being mostly psychological and economic—is hidden from the people’s eyes. “Our society lacks the awareness and is not conscious of the freedom of speech,” stated Vessela Tabakova, a professor at Sofia University and head of the Center for Independent Journalism. Journalists at small and regional media appear to be most vulnerable to such pressure.

Slight improvement was registered in the equal treatment of commercial and public media and the provisions for former state outlets’ editorial independence. Although formally granted independent status, the public media have not yet been weaned away from the state. First, these outlets continue to receive subsidies from the state budget, and second, they are potentially prone to manipulation through the appointment of their general directors. For example, the public outlets’ directors are appointed by the Council on Electronic Media, which is composed of members elected by the political parties represented in parliament.

The means of settling libel disputes remains problematic. Libel is no longer a penal code matter, but according to the domestic legislation, defendants should prove the truth of their statements. Accountability of public figures is held in no great esteem. “For years we’ve seen no attempts to solve the problem of transferring libel and defamation from criminal into civil terms,” said Gergana Jouleva, executive director of the Access to Information Program.

## OBJECTIVE 2: PROFESSIONAL JOURNALISM

Bulgaria Objective Score: 2.09 / 4.00

The quality of journalism and compliance with professional standards scored lower in 2005 than in previous years. Panelists noted the difficulties some regional media are experiencing in gaining access to certain events. Yet, the decrease is to a greater extent explained by the continuing self-censorship practiced by both reporters and editors. MSI panelists have been addressing self-censorship in every survey to date. In 2005, the increasing self-censorship was attributed to economic, not political, drivers.

It cannot be understated that self-censorship by reporters and editors remains among the most serious problems Bulgarian media are facing. "Journalism is failing. There are symptoms of censorship. Self-censorship is omnipresent," stated Vessela Tabakova. Despite existing provisions for the freedom of speech, both journalists and managers continue to practice self-censorship. This practice arises because some outlets are either owned by certain business groups or the media owners have certain political or business affiliations. Therefore, editorial policies and sales plans take into consideration the need to protect those interests. As a result, critical coverage or investigations into business

partners are restrained, while the improprieties of the competition are widely publicized. Whereas national media practice

this less visibly, self-censorship is more apparent at smaller outlets, especially in cities with more developed business sectors. Self-censorship has proven to be an alarmingly persistent practice for years now, and seems impossible to overcome. "Professional standards are pursued by the nationals and undermined in the local media, because of unskilled or untrained staff and quite sustainable self-censorship," declared Rosita Popova.

The coverage of key events and issues takes place largely without discrimination for political or economic reasons. Every outlet strives to ensure coverage of the key events to enrich its information content and improve its competitiveness. This was proven during the pre-election campaign for the 2005 general elections.

The pay levels for journalists and other media professionals are relatively high and proportionate to other industries, but only at the large national media. Top professionals there may earn more than 10 times the national average. On the other hand, smaller local media often pay only the minimum wage for the country. Low pay for journalists at small or local outlets is often compounded by the lack of proper employment contracts. Journalists are frequently paid at the minimum state wage level. These wages can be supplemented, depending solely on the owner's whims. Thus, journalists become financially dependent on the owners, thereby leading to an unstable workplace, staff turnover, and the loss of a skilled force to other industries.

Overall, the quality of journalism in 2005 scored lower compared with previous MSI surveys. The decline does not reflect a deterioration of the professional coverage of events and work with sources. Instead, the regression is largely due to the tendency of enhancing entertainment programming at the expense of news and information. For the time being, programming is not overly unbalanced, but even the public media's output is beginning to be dominated by entertainment. Faced with extremely tough competition, the leading radio and television companies have increasingly begun to air quiz shows, raffles, and reality shows as a major part of their programming. Although not entirely subordinating news and current affairs, entertainment has visibly started to expand its reach.

***"Journalism is failing. There are symptoms of censorship. Self-censorship is omnipresent," stated Vessela Tabakova.***

### 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).

***“To me, we’ve moved forward compared to last year. The Code of Ethics was adopted after last year’s panel. A number of outlets have adopted it, albeit its enforcement is still a problem,” explained Dimitar Sotirov, executive director of the Bulgarian Media Coalition.***

A success in 2005 is the continued effort by the media community to invest in ethical self-regulation. After the adoption of a common Code of Ethics, the focus is now on establishing an Ethics Committee to enforce the code. Its membership is still taking shape,

but within the media community there is mutual consent and understanding regarding its structure. “To me, we’ve moved forward compared to last year. The Code of Ethics was adopted after the last year’s panel. A number of outlets have adopted it, albeit its enforcement is still a problem,” explained Dimitar Sotirov, executive director of the Bulgarian Media Coalition.

Corrupt practices among journalists are limited; there are hardly any attempts to directly influence journalists. And such practices are almost never manifested through direct payments. However, there are other incentives available at the news desks. Such incentives include covering travel expenses for the journalists or offering certain privileges (e.g., hiring the relatives or friends of a journalist). That said, the national media have aired no major investigation into corruption during 2005.

Technical facilities for gathering and distributing news are up-to-date, modern, and unrestricted.

Quality beat reporting is still underdeveloped. There are outlets that pursue quality beat coverage (the newspapers of the Westdeutsche Allgemeine Zeitung (WAZ) group and the national television channels), but they are an exception. There are examples of specialized reporting by many outlets, but they are occasional and mostly driven by individual reporters, rather than resulting from overall editorial strategy. For example, some reporters gradually become specialized in covering law or business but continue with general coverage as well. The mainstream national media have specialized reporters in several “must-have” areas such as business, politics, and crime. Niche reporting is nearly absent in areas such as civil society and vulnerable groups or minorities. According to Gergana Jouleva, “One of the national media, it strikes me, does not cover the NGO sector. Like it doesn’t exist, even though there is much going

on there.” The lack of quality niche reporting is a particular drawback for small and local outlets.

### **OBJECTIVE 3: PLURALITY OF NEWS SOURCES**

**Bulgaria Objective Score: 2.47 / 4.00**

The plurality of Bulgaria’s media environment has not changed significantly in 2005. Citizens’ access to local and foreign sources of information is not openly or indirectly restricted by the government. Where there is limited access to media, the reasons are mostly economic, or with regard to local outlets, educational. Cost is the most common reason for not buying or subscribing to different publications. The online reach of print media is still insufficient due to the still small number of people with Internet access.

International media have little penetration because of the language barrier. A meager 16 percent of the population speaks a foreign language with the proficiency that could allow access to foreign sources of information.

Panelists indicated near sustainability regarding the degree of independence news agencies have in distributing news to print and broadcast outlets.

#### **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.



Along with former state agency BTA, electronic news agencies like BGnes and Focus News as well as Internet news portals like SEEnews and novinite.com are active. They are available through standard subscriptions and, increasingly, through value-added services via websites and mobile telephony providers.

The level of transparency of media ownership remains unchanged. Formally, the majority of media outlets have well-known owners, but there is public doubt about behind-the-scenes ownership. Doubt remains due to some ownership claims cloaked in offshore transactions, figurehead stakeholders, and bearer bonds. "There's no transparency of ownership of private media," declared Vessela Tabakova. Meanwhile, all formally legal means of ownership for media are those that apply to businesses in general; there are no media-specific prerequisites.

Independent broadcast media produce their own news programs. "The production and the quality of the outlets' own programming strongly depend on economic factors. There are many which still try to pass quantity for diversity," stated Rosita Popova. Some outlets specialize in a particular format of current affairs and commentary programs. Most notable are two cable channels: Sofia-based 7 Dni and the SKAT cable network. They have almost nationwide reach through cable networks but relatively low production quality. Their programming is dominated by talkshows, and the hosts of these shows frequently run for office in local elections. In 2005, one of them was elected to parliament by gaining more electoral support than the entire audience share of the channel. The two channels are closely tied to the economic and partisan circles of members of the former Communist Party. The two channels manage to attract viewers and supporters by using an overtly oppositionist and nationalistic tone.

Vessela Vatzeva, chair of the Association of Regional Media, argued: "Regional media are more objective than the national media, which resort to simply marking off the events. The media still seem to be fascinated by the selling power of yellow journalism." Regional outlets cover local events more extensively and accurately than the nationals do through their correspondents. The national media seem to devote less time and attention to regional issues, and coverage of local events is sketchy. National media often overlook a wide variety of perspectives in trying to sort through the local events of national importance.

The diverse supply of products on the media market can satisfy a variety of public needs and interests. There is a certain imbalance in conveying the social purpose of programming, which presumably should be the priority

of public media. Judging by the relative number of such programs, commercial outlets do not seem to have

conceded that function entirely to public media. For example, private radio and television stations with national coverage—like Darik, bTV, and Nova—despite their commercial status, offer educational programming and coverage of issues of social significance (children/youth rights, vulnerable group issues). They also provide investigations into priority areas of public importance (corruption and judicial reform). Thus, despite operating without state funding, commercial media contribute to the needed coverage of socially significant topics.

Without experiencing political or legal restrictions, minority-language media have failed to develop and increase their reach. Their potential coverage is generally low because of the market conditions and the desire of minority groups to be integrated into society. Furthermore, minority populations are relatively small in number and are diffused throughout the country, which makes specialized outlets less effective and impedes their distribution. The existing Turkish-language newscasts on National TV are not universally welcomed and even receive the political disapproval of one of the parliamentary factions, which introduced a bill to stop them.

***"There's no transparency of ownership of private media," declared Vessela Tabakova.***

#### OBJECTIVE 4: BUSINESS MANAGEMENT

**Bulgaria Objective Score: 2.59 / 4.00**

In recent years, the media in Bulgaria have been unfailingly judged as well-run businesses. The national bTV Channel, for example, was announced as the fastest growing News Corp. station in the world. The business development of media can be described as consistent. However, sustainability is not totally irreversible, and, in some aspects, outlets are still vulnerable to political currents. The 2005 election campaigns, for example, have shown that many media outlets, including some of the largest ones, are participating willingly in the political PR campaigns of the best-paying candidates.

Nothing has changed regarding the independence of outlets from state subsidies. There are no financial levers by which the state or its institutions can manipulate the content and management of commercial media. The existence and financial viability

***“There are means of concealing funding (state and municipal) of private outlets, regardless of their circulation,” said Rumiana Emanouilidou.***

of independent printing and distribution companies is another sign of stability.

The Bulgarian media are able to generate revenue

from a variety of sources: advertising, sponsorship, and sales. The annual advertising revenue in the media sector has grown by one-third compared with 2004, according to rough estimates. The actual breakdown is difficult to calculate because not all outlets report them officially. However, according to journalist Rumiana Emanouilidou, “There are multiple sources of revenue. It is a free market, but none of those sources seem to contribute enough to the media development.” The majority of the outlets are not funded by the state, with the exception of public radio and television. Some regional media receive funding from municipal budgets. “There are means of concealing funding (state and municipal) of private outlets, regardless of their circulation,” continued Rumiana Emanouilidou.

Despite alternatives, the source that continues to provide the most revenue remains advertising. Thus, some outlets cannot cast off their dependence on advertisers, in both the economic and political aspects

of their relationships. The smaller the outlet, the more dependent it is on its advertisers, some of which carry specific political agendas. This political bias can be observed in the distribution of revenue from the general election media campaign in 2005. Small outlets received nearly all of their annual income during the general election campaign, simply by airing candidates’ spots. At national outlets, revenue from political advertisements amounted to 10 percent of the total, whereas at smaller channels advertising revenue consisted of 30 to 50 percent of their annual total. These outlets managed to sell almost 50 percent of their time for the duration of the campaign.

Most advertising agencies are very professional and operate by observing free-market rules in distributing media accounts. Advertising agencies are generally well-staffed and efficient. However, the market is still partly monopolized, and overly close ties between advertising and media structures tend to favor some media at the expense of others. Regional outlets are the most vulnerable in such a situation, as they can rarely get a share of advertising profits. Vessela Tabakova said, “The advertising business is somewhat monopolized. Ratings cause conflict and suspicion. Advertising is channeled to selected outlets.”

Advertising conglomerates have a set of affiliated outlets with appropriate formats to secure the widest coverage of major target groups. The distribution of ad money follows professional criteria and standards but is limited to the circle of media—such as bTV—that are affiliated with the agencies. Meanwhile, the professional staff at agencies and at outlets as well as the developed media market as a whole ensures that commercials are aired in compliance with corresponding norms and regulations. Subscription fees represent a minor source of revenue for outlets.

The large national broadcasters like bTV and Nova TV and national radio networks like Darik and BG Radio use market and audience research to shape content. This is not a well-established and sustainable practice, however. Smaller outlets do not use research and rarely employ audience measuring to strategize on their development. Vessela Vatzeva stated: “There is total neglect for the number and makeup of the audience. Enough advertising goes to smaller outlets that have good programming. However, budgets are not spread according to professional criteria but are driven by owner’s interest. To me, 45 percent of advertising is commission-driven. Nobody cares about the audience. Advertising agencies work with old data and do not take into account changing audiences and target groups. The media market is not researched.”

**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.

The efficient market-driven operation of the Bulgarian media is compromised by the lack of reliable ratings and circulation figures. The only people-meter group—TNS in partnership with a local business—producing television viewership figures does not provide information from its sample even to the consumer committee that was set up by the firm’s owners. The objectivity of the people-meter system is widely questioned also because its owners have stakes in media outlets and advertising agencies. The same people-meters that produce viewership data also provide circulation figures and radio-audience measures. A new company, the consortium GFK–Austria, has announced intentions to run a people-meter system, but it is still in the planning stages.

A Bureau for the Independent Audit of Circulation exists, but it is not fully functional or reliable. Not all print media are members, and the information submitted is not representative. As a result, the figures are not even used by advertising agencies in planning their print media ad campaigns.

**OBJECTIVE 5: SUPPORTING INSTITUTIONS**

**Bulgaria Objective Score: 2.99 / 4.00**

In developing the media in Bulgaria, the supporting institutions in the sector have consistently achieved success. Organizations supporting the independent media not only exist but are efficient, authoritative, and consistently improving. In 2005, as well as in previous years, the supporting institutions in the media sector were the most highly developed objective. Moreover, the growth in supporting institutions will be most unlikely to be overturned by a change in the political environment. Supporting institutions have continued to grow and positively affect the general media setting in the country. The high scores awarded to this objective reflect the agreement of the media community to adopt a common Code of Ethics, establish an Ethics Committee, and invest joint efforts in drafting the new media law.

The highest level of sustainability relates to the free and apolitical access to sources of newsprint and printing facilities. These facilities are entirely private owing to direct capital investment by WAZ, or through the privatization of the former state printing houses. They are well-run, independently funded, and independent from the state. Channels of media distribution (e.g., kiosks, transmitters, and the Internet) are in private hands, apolitical, and unrestricted. Though some of these channels have insufficient reach in particular regions, they are rapidly expanding. The distribution channels for the print media and the

reach of the electronic media have been expanding throughout 2005 and have almost covered the whole country. They remain underdeveloped in regions of low population density. Overall, they provide a solid foundation for the sustainable development and independence of media in Bulgaria.

Trade associations representing the interests of media owners are among the strongest supporting institutions in the media sector. In 2005, the Union of National Media emerged by bringing together the associations of media owners in print and broadcasting. It was actively involved in addressing the problems of the media community by discussing and presenting statements on current media issues and consulting with institutions on matters of media legislation.

The nongovernmental organizations (NGOs) supporting free speech and independent media—the Access to Information Program, the Free Speech Forum, the Center of Independent Journalism, and the Association of Investigative Journalists, among many others—have maintained their solid presence and active public-advocacy roles. Their joint body—the Bulgarian Media Coalition—has for years maintained its high public authority, good record of media assistance, and effective relationship with the state and the legislature. It has alerted the public when attempts to violate the freedoms of national and local media take place, thereby emerging as an advocate of free speech.

**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.

The state of the professional associations in protecting the rights of working journalists is not secure. These groups are ineffective and fail to include journalists from commercial outlets. Media owners are not supportive of such organizations and in practice attempt to undermine the protection of journalists' rights. For example, membership in organizations for the protection of journalists' professional and labor interests is tacitly forbidden. The relations between journalists and employers are settled face-to-face. "Every owner is firmly against journalists uniting," said Rumiana Emanouilidou. Together with the low wage levels at local outlets, this opposition from media owners leaves journalists strongly dependent on the owners and confined by editorial policies, compromising the freedom of speech. Membership in the two main professional associations, the Union of Bulgarian Journalists and the Podkrepa Union of Journalists in Bulgaria, is very limited and their ability to effectively support journalists' rights is poor. Vessela Tabakova explained that "there is considerable division among professional associations in the media. There's no professional community in public media. Journalists in private media have no protection of their interests." Vessela Vatzeva added: "Journalism is not a free profession as it is in other countries. Journalists themselves are unwilling to unite. They depend on contracts and employers. If they were strictly freelancers, they would have united and become more active. Just like in any other business, they cannot be brought together. They are refraining from such attempts for fear of getting hurt, or getting fired. "

Journalism degree programs at older universities are still not considered satisfactory. The newly established journalism programs at regional higher-education centers are also of questionable quality. They focus on theoretical training, and practical skills are largely overlooked. These programs need to be updated; practical training is still the weakest part of journalism education. It is still very common for journalism students to start working at media outlets before graduation in order to get some practical experience.

Organizations offering short-term journalism training contribute to the improved quality of reporting in Bulgaria. Organizations like BTC-ProMedia and the Media Development Center are well-established and have gained the respect of the media community. These organizations cater not only to national outlets, but also to small and local ones. The owners of small regional outlets cannot afford to send their staff to every available training program, as it undermines their capacity to provide daily coverage. Owners are also unmotivated to train their workforce because of the considerable staff turnover at small media outlets.

## Panel Participants

**Jasen Boyadjiev**, Program Director, Info Radio; Cofounder/Chair, Free Speech Civic Forum

**Rumiana Emanouilidou**, Journalist

**Petko Georgiev**, Executive Director, BTC ProMedia; Political Analyst, Radio New Europe

**Gergana Jouleva**, Executive Director, Access to Information Program

**Georgi Losanov**, Professor, Faculty of Journalism and Mass Communications, Sofia University

**Rosita Popova**, Board Member, Union of Bulgarian Journalists

**Dimitar Sotirov**, Executive Director, Bulgarian Media Coalition

**Peter Stefanov**, Manager/Owner, Roma TV

**Vessela Tabakova**, Professor, Faculty of Journalism and Mass Communications, Sofia University; Head, Center for Independent Journalism

**Juliana Toncheva**, Member, Council on Electronic Media

**Vessela Vatzeva**, Chair, Association of Regional Media

## Moderator

**Rumiana Bachvarova**, Sociologist, Managing Director, LINKS Market, Media & Public Opinion Research Agency

# BULGARIA AT A GLANCE

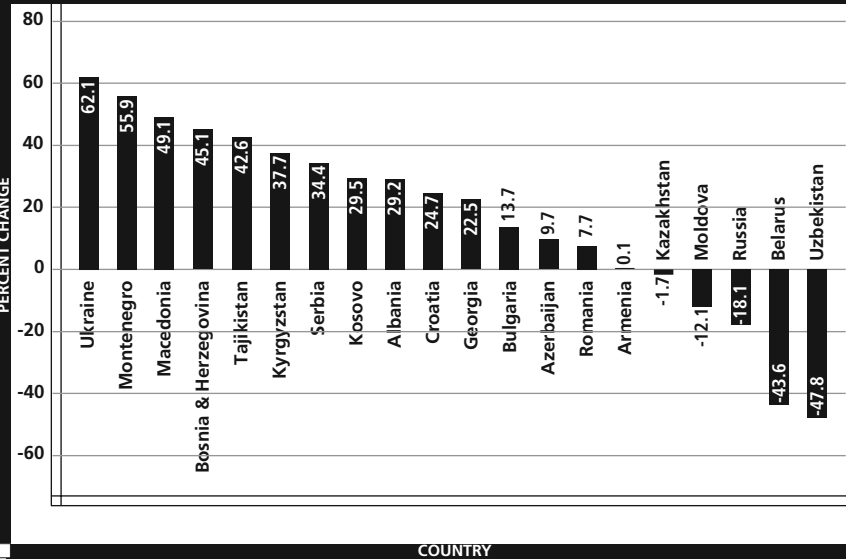
## GENERAL

- **Population:** 7,761,049 *National Statistics Institute*
- **Capital city:** Sofia
- **Ethnic groups (% of population):** Bulgarian 84%, Turk 9%, Roma 5%, other 2% *National Statistics Institute (2001 Census)*
- **Religions (% of population):** Eastern Orthodox 83%, Muslim 12%, Catholic 1%, other 1%, NA 3% *National Statistics Institute (2001 Census)*
- **Languages (% of population):** Bulgarian 85%, Turkish 10%, Roma 4%, other 2% *National Statistics Institute (2001 Census)*
- **GDP:** \$24.1 billion *National Statistics Institute (2005)*
- **President or top authority:** President Georgi Parvanov, Prime Minister Sergej Stanishev
- **Next scheduled elections:** November 2006, presidential

## MEDIA-SPECIFIC

- **Newspaper circulation statistics (total circulation and largest paper):** 318,069 (*National Statistics website*). TRUD is the best-circulated daily, but the exact figure is unavailable. 424 total publications in 2004.
- **Broadcast Ratings (top three ranked stations):** bTV, NOVA, BNT Channel One (public operator)

MSI AVERAGE SCORES—PERCENT CHANGE 2001–2005



- **Number of print outlets, radio stations, television stations:** 24 dailies, over 900 other print media, 424 newspapers, 111 radio stations (*Council of Electronic Media Register of Licensed Radio Operators*), 187 television stations
- **Annual advertising revenue in media sector:** Approximately \$125 million *MM Links*
- **Number of Internet users:** 1.3 million *MM Links*

MEDIA SUSTAINABILITY INDEX: BULGARIA

