

MEDIA SUSTAINABILITY INDEX

2006/2007

**The Development
of Sustainable
Independent Media
in Europe and Eurasia**



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The Development of Sustainable Independent Media in Europe and Eurasia

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IREX

2121 K Street, NW, Suite 700

Washington, DC 20037

E-mail: msi@irex.org

Phone: (202) 628-8188

Fax: (202) 628-8189

www.irex.org

Project managers: Mark Whitehouse and Drusilla Menaker

IREX Project and Editorial Support: Blake Saville, Drusilla Menaker, Mark Whitehouse, Michael Clarke, Leon Morse

Copyeditor: Kelly Kramer, WORDtoWORD Editorial Services

Design and layout: OmniStudio

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The 2006 MSI results reflect the panelists' conclusion that the Bulgarian media have progressed toward greater independence and sustainability and that despite some persistent areas of relative weakness, this development is irreversible and sustainable.



BULGARIA

The strengthening of Bulgaria's media sector is closely linked to the overall and ongoing economic and social development of the country. Improvement comes as part of the larger process of harmonizing domestic laws and the social environment with European norms, as well as the country's preparations for European Union membership. Global processes, such as changes in broadcast technology and expansion of the Internet, also play roles.

Especially influencing Bulgaria's media sector in 2006 was the resumed licensing of new media outlets. Although the process had a rocky start, there are now a few newly licensed regional outlets. Parallel to that, consolidation and foreign investment gained momentum as global investors such as SBS Broadcasting Group, Balkan News Corporation, and Communicorp entered the market, with the most activity in the radio sector. The advertising market continued to expand, showing not only general increase in revenue, but growth in new platforms such as outdoor networks and online media.

The development of Bulgarian media as independent professional and business entities continued in 2006. The annual Media Sustainability Index (MSI) records an overall increase from 2.3 for 2002 to 2.98 for 2006. The summary ranking of 2.98 for all indicators suggests that Bulgaria has made a significant advance on sustainability levels and that this improvement is manifested under different administrations and regardless of government changes.

For the first time in Bulgaria, multiple indicators and objectives received scores over 3.0 in 2006. With a value of 3.27, the highest-scoring objective is the existence of multiple news sources that provide the public with reliable and objective news. It is also the objective where improvement from previous years is most notable, rising nearly a full point from 2005. The key reason for this positive shift is the way consumers use the media, MSI panelists said. The major change is the growing reach of the Internet to diverse age groups and regions. Coupled with a greater online availability of the main print and broadcast outlets, this expansion moves Bulgaria toward virtually unobstructed access to media.

Also steadily growing are ratings for the existence and performance of supporting institutions. This reflects the evolution of the associations representing and protecting the interests of media owners and journalists, and in particular the de facto implementation of the Code of Ethics of Bulgarian Media. Another objective where sustainability significantly improved is the ability of the media to operate as well-managed businesses, allowing editorial independence.

BULGARIA AT A GLANCE

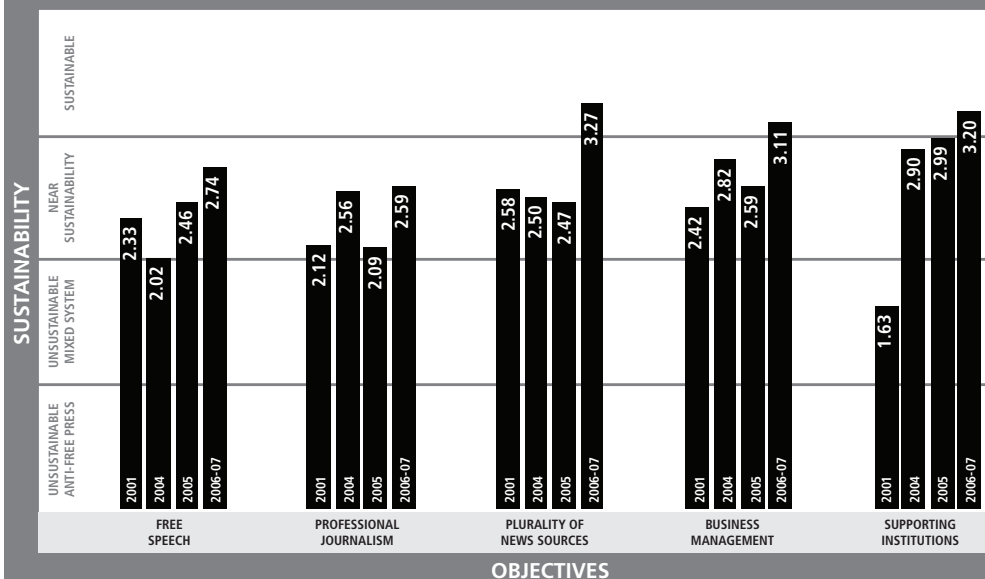
GENERAL

- > **Population:** 7,322,858 (July 2007 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*)
- > **Languages (% of population):** Bulgarian 84.5%, Turkish 9.6%, Roma 4.1%, other and unspecified 1.8% (2001 census, *CIA World Factbook*)
- > **GNI (2006-Atlas):** \$30.733 billion (World Bank Development Indicators, 2007)
- > **GNI per capita (2006-PPP):** \$10,140 (World Bank Development Indicators, 2007)
- > **Literacy rate:** 98.2% (98.7% male, 97.7% female) (2001 census, *CIA World Factbook*)
- > **President or top authority:** Prime Minister Sergei Stanishev (since August 16, 2005)

MEDIA-SPECIFIC

- > **Number of active 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
- > **Newspaper circulation statistics:** 318,069 (*National Statistics website*). TRUD is the best circulated daily, but the exact figure is unavailable.
- > **Broadcast ratings:** highest-rated television outlets: bTV, NOVA, BNT Channel One (public operator)
- > **News agencies:** Not available.
- > **Annual advertising revenue in media sector:** Approximately \$125 million (*MM Links*)
- > **Internet usage:** 2.2 million (2005 est., *CIA World Factbook*)

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.

However, although scoring higher than in the past, two objectives still lag. The lowest-scoring objective in 2006 reflects the general legal and enabling environment in which the Bulgarian media operate. Despite increasing from 2.46 to 2.74, the indicator reflected MSI panel criticisms about the way the licensing of new outlets is handled and the tenor of the regulatory environment. Among individual indicators, underachievement is evident in several areas: the economic interests of media owners can be inconsistent with the news function of the outlet; editors and reporters may respond to the environment through self-censorship; and the inadequate transparency of media ownership fails to fully guarantee economic or political independence.

However, the 2006 MSI results reflect the panelists' conclusion that the Bulgarian media have progressed toward greater independence and sustainability and that despite some persistent areas of relative weakness, this development is irreversible and sustainable.

OBJECTIVE 1: FREE SPEECH

Bulgaria Objective Score: 2.74/4.00

The legal environment for Bulgaria media has improved but still lags, with development hinging on economic and social factors. Although Bulgarian law provides enough guarantees for freedom of speech, isolated encroachments still occur. During 2006, for example, a leading journalist was dismissed from bTV, and SKAT TV transmissions were suspended.

The main area of concern for MSI panelists, however, was the licensing of new outlets. The long legal stalemate over licensing may have ended, but discussions continue about what course should be taken in view of pending digitalization and how to treat outlets with expired licenses or permits. MSI panelist Maria Stephanova, a member of the Council on Electronic Media (CEM), said, "The important thing is that CEM has finished work on the regulations: criteria, manuals, and the like. We're ready for the formal issuing of licenses to begin." The process has begun with the first six regional licenses awarded in 2006, and the next stages will be telling, panelists said. "There's rumor of bias in licensing," said panelist Evgeny Todorov, managing director of Plovdiv Public TV. "We'll know if they're true in (2007), when the first new regional TV licenses will be given."

The other challenging aspect is the degree of protection for journalists who are victims of crimes. Also, though rare, there are cases when journalists need to prove their innocence. These are mostly found in the regional media and result from exposing economic or administrative wrongdoing by

Free entry into the journalistic profession and access to international news and sources continued to grow. Bulgaria has achieved a level of unquestionable sustainability that cannot be challenged by economic and political upheaval.

local institutions or businesses. Panelist Dimitar Sotirov, executive director of the Bulgarian Media Coalition, noted a case involving the mayor of Tutrakan: "Instead of having to prove that journalist Kalina Grancharova was lying, he chose to sue her for slander. She went to court with all the documents proving her case and was still found guilty. There's no second-instance court to appeal at."

MSI panelists expressed disapproval about the effectiveness of legal proceedings in cases when journalists are exposed to threats as a result of their publications. Although assaults against journalists are not occurring, there have been separate attempts at intimidating investigative reporters, including the case of Vassil Vassilev of Nova TV, at whose residence a bomb was detonated. The investigation failed to reveal the perpetrators, contributing to creating an environment where journalists feel threatened. Young reporters starting their careers acknowledge that events such as these cause them to reconsider their commitment to journalism.

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.

Panelist Dimitar Sotirov, exective director of the Bulgarian Media Coalition, noted a case involving the mayor of Tutrakan: "Instead of having to prove that journalist Kalina Grancharova was lying, he chose to sue her for slander. She went to court with all the documents proving her case and was still found guilty. There's no second-instance court to appeal at."

The 2006 MSI saw slight decreases in panelists' assessments for two important indicators. The first one relates to the accessibility of public information. Journalists continue to be the active side in soliciting information and endeavour not to be discouraged when information is refused. Courts usually rule in favor of journalists in legal action against refusals of information, and the public is aware of this. State bodies, however, persist in refusing information and limit publicity to what is available on official websites of ministries, agencies, and municipalities. As a result, investigating topics of public importance is obstructed, and an environment of inadequate transparency is created. "As regards the access to public information, our legislation is fine, but we fail in putting it to practice. Information is refused even after the court has ruled that the institution in question must provide it," said Sotirov.

Another issue affects the plurality of the media scene. The fees (state-collected transmission fees) small regional outlets need to pay are disproportionate and inconsistent with the limited advertising revenue they can generate locally. Hence, MSI panelists continued to give low marks to the indicator of market and tax conditions in the media.

Free entry into the journalistic profession and access to international news and sources continued to grow. Bulgaria has achieved a level of unquestionable sustainability that cannot be challenged by economic and political upheaval.

OBJECTIVE 2: PROFESSIONAL JOURNALISM

Bulgaria Objective Score: 2.59/4.00

The observance of international standards and the professional level of Bulgarian journalism received significantly higher scores during the 2006 MSI assessment. The improvement was nearly a half point over the previous year's survey, to 2.59. Movement toward sustainability is steady, with all indicators showing increases from the prior

year. However, professionalism still is hampered by sometimes hidden dependencies on political and governmental forces and continues to lag relatively in the context of the overall forward movement of Bulgaria's media sector.

The most notable improvement was in the degree of implementation of self-regulation mechanisms. Following the adoption of the Code of Ethics in 2005, two ethical committees—in broadcast and print—became fully functional in late 2005 and began to address concrete industry issues. Both industry professionals and the general public accept and acknowledge the standards laid by the code.

Another aspect where Bulgarian media approach international journalism standards is in regard to the existence and development of quality niche reporting. Outlets with national coverage have experienced and capable journalists covering specific beats. Investigative journalism is developed as well, adding value to the services media organizations provide to their audiences. However, panelists said, specialized coverage is largely lacking in small-scale regional outlets. It is difficult for smaller media organizations, usually struggling with high turnover of skilled staff, to afford the resources necessary for the nurturing of their own specialized beat reporters.

The highest-scoring aspect of this objective is the degree of availability of up-to-date technology in news-gathering and production. Bulgarian media are sufficiently equipped to ensure timely and adequate coverage of events, panelists agreed. In general, Bulgarian outlets have all the needed

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.
- > Media outlets have unrestricted access to information; this is equally enforced for all media and journalists.
- > Quality niche reporting and programming exists (investigative, economics/business, local, political).

facilities to access local and international news sources and to put together a quality product.

Also strong is the degree to which main events and issues are being covered. "Journalists are doing everything, covering everything that's in their power," said Petko Georgiev, executive director of BTC ProMedia, a media-support organization. However, while no formal limitations are imposed, there still are topics that media fail to cover persistently or sufficiently thoroughly. "There are events which simply don't get covered," said Sotirov. "Stories about the police, lately. There's pressure against journalists revealing stories, which the interior ministry was trying to cover up."

Local outlets also are likely still to cover government administrations in their regions by simply mirroring official press releases. "PR journalism is everywhere in the local media," said Tzveta Nenova, a journalist from local radio station Arena media in Russe. "Take any radio station and their bulletin is all about press releases of the mayor, district governor, and the like. Same in print. All the local reporter needs to do is sign the story. The public gets used to this kind of product. And if a quality program should now and then be aired, the audience won't respond to it. They'll have lost their reflex to appreciate quality."

Nationwide, the fair, objective, and well-sourced coverage of key events is another aspect of positive development, according to panelists. The increase in the indicator's rating is consistent with efforts to offer the public a variety of perspectives on issues and events. There are still problems in presenting the official standpoint of an institution, however. A large portion of regional media, sometimes even major outlets, literally and indiscriminately convey the announcements made by press offices of official institutions.

No significant change was recorded in the relation between news and entertainment programming, although panelists noted that during 2006, the leading broadcast media increased the share of entertainment telecasts and reality formats in their programs. Moreover, they said, the new formats tended to dominate prime time and to cross over to other categories of programming, such as morning shows and night-time talk programs. Entertainment features also are grafted onto current-affairs and commentary formats. "I think that most of the big media, especially TV and radio, know perfectly well who their audience is and how to reach them," said Assya Kavrova, chair of the Commission of Ethics in the Electronic Media. "Now, if one topic leaves the traditional current-affairs show and moves to an entertainment program, it is addressed in a new way altogether and reaches a much wider audience."

"Take any radio station and their bulletin is all about press releases of the mayor, district governor, and the like. Same in print. All the local reporter needs to do is sign the story. The public gets used to this kind of product. And if a quality program should now and then be aired, the audience won't respond to it. They'll have lost their reflex to appreciate quality."

These developments were not seen as affecting the news content in such outlets. News programming retained, or even increased, in volume and quality, the panelists said. In local outlets however, interactive "SMS" shows are gaining ground over news and current affairs. SMS quizzes and interactive shows are the main revenue source for local outlets, and they dominate the programming. Even in the newscasts of national channels, which broadcast popular entertainment and reality programs, there are stories that cover the unfolding of the program. The goal is to retain the audience and cater to different targets. As a whole, news kept its weight within the overall programming, but quality commentary formats began to fall short, the panel concluded.

Pay levels for media professionals were an area showing little movement. Panelists regarded earnings as adequate in the big national outlets, but low in small and local media. The situation mirrored the overall state of wages nationwide—high in the capital city, low elsewhere—and the unbalanced development of the advertising market across different regions of the country. Panelists also noted that no matter how high, journalists' pay cannot be the sole barrier to interested parties attempting to pass on or stop a story. Nor could it prevent journalists from leaving the profession to earn better salaries or career prospects in other industries, panelists said.

Self-censorship among journalists and editors continued to be an area of concern for the MSI assessors. The industry's sensitivity to this topic is consistently high, so much so that isolated symptoms tend to be interpreted as usual. Panelists commented that straight and clear proof of self-censorship is hard to identify. Indirect evidence could be in the form of a journalist owning a latest-model cell phone or taking a complimentary trip or awards given by state institutions to those who report on them. "Oh, they do censor themselves, you bet," said Sotirov. "They follow their economic interest. Here's a true story from a respected regional newspaper. The editor-in-chief is welcoming a guest proudly showing stories in the latest issue: 'this is paid, that is paid, and this, and that...'"

A limited number of media outlets are owned by large business structures with big portfolios. They develop a general format and strive to provide objective information. It is still impossible to say that the ties between media and advertising interests, identified in previous surveys, have been resolved.

However, a growing number of outlets are introducing internal rules aimed at limiting the options for indirect repaying of favors: refusal of awards in cash or above certain value, employees declaring property, etc. "There are outlets where journalists cannot accept a journalism award if it comes with a check," said Georgiev. "A statuette or a certificate is OK, but not a check."

OBJECTIVE 3: PLURALITY OF NEWS SOURCES

Bulgaria Objective Score: 3.27/4.00

The plurality of the media environment is steadily evolving. More than a half-point growth has seen this objective move toward sustainability at 3.27, where Bulgarians' access to multiple news sources is less dependent on current factors and more durable and irreversible.

Achievement is most notable as regards access to local and international media. No formal restraints are imposed on use of the media by the public. The only objective setbacks are the degree of affordability of all available media and the foreign-language limitations.

Near maximum sustainability is achieved regarding the variety of public and private sources of news and information.

The indicator measuring the political plurality in the coverage of state and independent outlets has moved to a higher level. Both state and private outlets are working in the public interest, free of political affiliation, panelists said. The increased scores also reflect the mitigation of tensions at Bulgarian National Television and the increased professionalism of news coverage there.

Independent outlets producing their own news programs is another indicator where sufficient sustainability is achieved. All broadcasters, especially in television, are producing their own bulletins, whether or not equally high production values are observed, the MSI panel agreed.

The degree of representation in the media of various social groups and their interests also is solidly evolving. There are no formal barriers to their existence and development. Their reach is limited only by language, while the overall tolerant inter-ethnic environment in the country encourages the integration of minority groups, panelists said. Journalists coming from ethnic minorities stand good chances for professional development in different media. Despite resistance from opposition parties, the national television and radio are airing Turkish-language news.

The key indicator under this objective where progress is slow involves the transparency of media ownership, rated at only 1.82 and reflecting increased concentration of ownership and foreign investment, panelists said. "I think the monopolies we knew in print are starting to take shape in the broadcast media, too, given all the concentration," said Sotirov, executive director of the Bulgarian Media Coalition. However, Georgiev, BTC ProMedia executive director, said: "We have relatively high, compared to our neighboring countries, variety of media ownership: German, Swedish, Greek. You can't say one or two conglomerates control everything. There are conglomerates, but they haven't cornered the market and created an oligarchy."

Leading outlets with national coverage, like bTV, are officially owned by offshore entities. Some of the new applications for licenses also were submitted by offshore companies. Change of ownership and acquisitions usually lead to change of format, affecting the media plurality in the country, panel members noted.

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.

A limited number of media outlets are owned by large business structures with big portfolios. They develop a general format and strive to provide objective information. It is still impossible to say that the ties between media and advertising interests, identified in previous surveys, have been resolved.

Panelists said ownership directly affects content in two cable channels—SKAT TV and Channel 3. They have become a platform for a mixture of political and artistic views, striving to produce their own, original shows, which set them apart from the available uniform content and give them a niche of their own. “There are media which now offer a real alternative ... by targeting a very specific audience,” said Georgiev. “An alternative to having every last cable channel acting like a national broadcaster. These outlets are the first ones to realize that there’s no point in doing that. So they choose to specialize—be it nationalistic talk or sheer entertainment.” Noted as an example of an outlet giving tribute to a number of journalists who wouldn’t get access to the big mainstream media was SKAT TV, which offers prime-time access to the opposition Ataka party leader for a current-affairs program. This reflects a conscientious choice dictated not by economic motives but reflecting the political stance of the owners, panelists said.

OBJECTIVE 4: BUSINESS MANAGEMENT

Bulgaria Objective Score: 3.11/4.00

Bulgarian media continue to develop as well-run businesses with secure editorial independence. The higher level of sustainability, reaching 3.11 for the 2006 assessment, indicates the growing economic effectiveness of the country’s media outlets.

Consistent with previous years’ levels, the most sustainable indicator of this objective is the independence of private media from the state. Independent outlets do not receive any form of subsidies, which could place them under the influence of the state.

Sufficient levels of sustainability are registered in the functioning of the supporting firms, engaged in distribution and printing. They operate efficiently and are enough to support the work of the media outlets. In 2006, a printing facility owned by WAZ refused to print a newspaper to be circulated free of charge, and that was one reason for this indicator’s not reaching a higher rating. “This year there were attempts to launch new publications, but they failed because of the printing house. WAZ are well aware that a free newspaper will undermine their own circulation,” said Sotirov, Bulgarian Media Coalition executive director.

The biggest strengthening step is the role of market research in planning, revenue management, and programming. Audience research is increasingly used in shaping the program policies of outlets. “Audience research is becoming increasingly professional. No station would be willing to experiment with their prime time,” said Georgiev.

Some regional publications are still printed in distant locations. This, however, is a technical issue, as it does not harm distribution significantly, MSI panelists said.

The biggest strengthening step is the role of market research in planning, revenue management, and programming. Audience research is increasingly used in shaping the program policies of outlets. “Audience research is becoming increasingly professional. No station would be willing to experiment with their prime time,” said Georgiev, BTC ProMedia executive director. Reformatting in radio, new entertainment programs, and use of reality formats in television are firmly based on studying audience preferences and taste. However, this process still fails to include smaller regional markets.

Parallel to this, panelists praised introduction of an alternative PeopleMeter system to supply the media and advertising market with reliable information about national audiences. This also will help shed suspicions from the past

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 highest level of sustainability was yet again manifested by the indicator measuring the free, apolitical, and market-determined access to sources of newsprint and printing facilities. Governments have no means of influencing and controlling the activities of privately held printing facilities.

that PeopleMeters worked in favor of selected outlets, panelists said. The indicator still failed to move to a higher level of sustainability, which could be explained by the relatively recent launch of the second PeopleMeter system in October 2006. The situation is somewhat different in the print media. The Bureau for Independent Audit of Circulation exists but still is not providing public information about circulation and sales figures for publications. Reading audiences are not regularly and reliably researched.

Bulgarian media have a variety of sources of revenue. Advertising is the biggest source, with call-in and SMS interactive programs more widely used for generating additional income in the past year.

Panelists gave a positive appraisal of the processes in the Bulgarian advertising industry. The rapid growth is sustained over the years, and the advertising market continues to generate revenue for the outlets, commensurate with the widely accepted standards for commercial media. Advertising agencies and related businesses operate effectively and in line with international business standards for management and allocation of advertising budgets. Small and regional outlets, however, still fail to attract sufficient revenue and other benefit from the growing advertising market. Although too-close ownership ties still exist between media and advertising structures, the allocation of advertising budgets across media is largely professional and in line with the widely accepted standards of efficiency, MSI panelists said.

OBJECTIVE 5: SUPPORTING INSTITUTIONS

Bulgaria Objective Score: 3.20/4.00

Supporting institutions in Bulgaria have been evolving for years and have a solid record of performing in favor of the independent media. They continued to develop toward increased sustainability and independence from political and social influence during 2006, reaching a 3.20 rating.

The highest level of sustainability was yet again manifested by the indicator measuring the free, apolitical, and market-determined access to sources of newsprint and printing facilities. Governments have no means of influencing and controlling the activities of privately held printing facilities. Intervention by the ownership may affect market policies, however, with panelists citing as an example the refusal of one printing house to produce a competing publication that would have been distributed free of charge.

Sufficiently high levels of sustainability are manifested in the unrestricted and apolitical channels of media distribution.

Trade associations representing the interests of private media owners also are steadily evolving and developing. Organizations of owners in both print and broadcast sectors have been actively involved in the debates and events on the media scene in 2006.

Traditionally strong and influential, nongovernmental organizations (NGOs) have continued to perform as free-speech and media-freedom advocates. "There's now a whole family of advocacy organizations, and they cooperate on a number of occasions," said Georgiev, BTC ProMedia executive director. The criteria of sustainable development are met in this area, regardless of the fact that supporting NGOs did not have to intervene as frequently and vehemently as in the past. Panelists agreed that this should not be interpreted as a weakness but as an indicator of the generally calm media environment and that the well-established legislative framework and improving self-regulation are proving an effective barrier to violations of the freedom of speech.

Still falling somewhat behind the objective average ratings were both academic and short-term qualification programs for journalists. A new academic curriculum in journalism is in

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.

place, but practical training is still mostly unavailable, except for those in student jobs or internships. “Most students get to know about where the profession is going only because they work as journalists during their studies,” said Konstantin Markov, chair of the board of ABBRO.

The Media Development Center and the Professional Media Program are the two sources of training of active journalists. These two hubs have sustained a high demand in their service, but staff training is still hard to afford for many outlets, either financially or because they cannot have key members of their workforce taken away from the daily coverage. “If a journalist from a regional outlet is to attend a week’s training, there’s travel and other expenses on top of the training fee. It’s hardly affordable without support,” said Dimitar Lipovanski, independent producer with Arena media of Russe.

With the transition from donor-supported to paid qualification programs pending, the number of journalists receiving continuous on-the-job training is likely to fall. However, panelists suggested that the demand might rise as employers become more conscious of the skills of their staff and as journalists realize that personal improvement results in improved wages and better career prospects. “There will be more demand for quality (professional) education,” said Sotirov, Bulgarian Media Coalition executive director. “There’s need for specialized programs like business reporting, for instance. But such programs for the regional and small outlets will have to be subsidized for a long time to come.”

The lowest scores under this objective were again awarded to the indicator of professional associations working to protect journalists’ rights. The long-standing tradition of media owners and executives’ tacitly discouraging membership in such organizations has been ebbing, panel members said, and the Union of Bulgarian Journalists (UBJ) is becoming more active. “Membership in UBJ is growing. The whole staff of private outlets are enlisting, both print and broadcast,” said Rosita Popova, a union board member. “Even journalists at the *Trud* daily and the *24 Hours* daily are now allowed to be members.” Added Sotirov: “That’s a big step. Journalists used to be threatened to get fired, if they attended conventions of the UBJ.” However, panelists said that the union’s overall impact to date is relatively insignificant for both journalists and the broader media environment.

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Panel Members

Danail Danov, Media Development Center

Krassimir Dimitrov, Co-owner, Manager, Mixx Radio, Burgas

Petko Georgiev, Executive Director, BTC ProMedia; Journalist

Assya Kavrakova, Chair, Commission of Ethics in the Electronic Media

Dimitar Lipovanski, Independent Producer, Journalist, Arena media, Russe

Konstantin Markov, Chair of the Board, ABBRO

Tzveta Nenova, Journalist, Arena media, Russe

Rosita Popova, Board Member, Union of Bulgarian Journalists

Dimitar Sotirov, Executive Director, Journalist, Bulgarian Media Coalition

Galya Spassova, Editor-in-Chief, Horizont Program, Bulgarian National Radio

Maria Stephanova, Member, Council on Electronic Media

Evgeny Todorov, Managing Director, Co-owner, Plovdiv Public TV

Moderator

Rumiana Bachvarova, Market LINKS