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**EDITORIAL****EDITORIAL**

# Mass Media System in Bulgaria

**BY LILIA RAYCHEVA, TODOR PETEV** 

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**T**he articles in this volume reflect transformations that have taken place in the Bulgarian mass media landscape for a ten-year period. Since 1989 alongside with the basic political, economic and social changes in the country, profound shifts have taken place in print and electronic media.

Several main processes in the media system during the transition period in Bulgaria can be discerned:

1. In political terms, decentralization of the mass media system accompanied by the

emergence of a pluralistic press, radio and television system;

2. In legal terms, liberalization and deregulation of the mass media system, corresponding to the European patterns;

3. In economic terms, mass media market development in a highly competitive environment at local, national and global level with growing impact of advertising industry;

4. In social terms, demassification and fragmentation of the publics accompanied by higher selectivity stan-

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dards and social feedback;

5. In professional terms, departure from former corporate media standards and introduction of new formats, styles and liberal journalistic ethics;

6. In technological terms, revolutionary advent of new media incorporating national media to the global superhighways.

The newly established communication landscape demonstrates open challenges to the mass media developments in highly competitive environment.

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## ARTICLES

## ARTICLES

## The Transformations Processes in the Mass Media System in Bulgaria (1989-1999)

BY LILIA RAYCHEVA, TODOR PETEV

The mass media system in Bulgaria underwent dramatic changes along with the profound social, political and economic transformations. In a short time, without ideological control, the style and content of the broadcast and print media departed from the former standards. Political pluralism brought along the establishment of new party periodicals. In 1990, political campaigning boomed, bringing with it political advertising in the media. While campaigning in newspapers was not controlled, the Parliamentary Commission for Radio and Television set rigid guidelines for the electronic media.

The power of live television broadcasting was

demonstrated during the telecasts of the Romanian Revolution in December 1989. Then the Second Channel of the Bulgarian Television canceled its regular programming in order to extensively cover the dramatic events in Bucharest and Timisoara.

The Grand National Assembly adopted a new Constitution on July 12, 1991. It was the first democratic constitution in the former Eastern Bloc countries. It proclaimed that Bulgaria would be governed by the rule of law and set up the fundamental civil society. Zhelyu Zhelev, the leader of the Union of the Democratic Forces and a strong-minded dissident, was elected President by the

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National Assembly on August 1<sup>st</sup>, 1991. Political advertising and strong press and radio involvement influenced the final choice of the incumbents. The public opinion agency, SIGMA, conducted a survey in 1990 to determine how viewers assessed the televised political campaigning. Ten days prior to the first round and ten days after the second round of advertising, it asked, "Which political power did best on the TV screen? The answers were 39 percent and 33.5 percent for Bulgarian Socialist Party compared to 19.6 and 24.7 percent for UDF and 13.9 percent and 15.8 percent for the Bulgarian Agricultural People's Union.

SIGMA also attempted to assess the mass media credibility. National Television gained top ratings before and after the elections. The respective data were 59.6 and 38.5 percent for television, 44.7 and 36.3 percent for the BSP press, 31 and 33.8 percent for National Radio and 24.5 and 27.2 percent for the UDF press. The high credibility of television after the elections slid by about 20 percentage points. This dramatic drop followed the audience's rejection of the over-politicized programs.<sup>1</sup>

In the following election campaigns, the electronic media managed to be more balanced.

The fierce crossfire was flared in the print media, which continued to lose public credibility.

The mass media, among all the institutions in the country, promoted the transformation to democracy in the most profound way. In Sofia the spirit of the changes was felt at the open meetings and rallies. In the outlying areas the changes were felt chiefly because of television coverage. The organizers of protest rallies in support of change made sure they marched past TV headquarters. The media found themselves fulfilling the dual function of transmitters and catalysts of political change.

Journalists, just as politicians, were not ready to undertake their new functions and responsibilities. The emerging principles and styles of journalism were created ad hoc. Turbulent events forced journalists to learn and master their new roles by groping for free expression while balancing personal risk. They were on a quest for free and significant expression, public control over state institutions of authority. It turned to be an open challenge to the responsibilities of the Fourth Estate mission in a transforming society.

Prior to the dramatic changes in 1989, the Bulgarian mass

media system was centralized, state-owned and subordinated to the priorities of the Party-State system. The processes of decentralization, liberalization and privatization began spontaneously. Along with the overall economic and political crisis of the time, the mass media “revolution” developed on a practical, trial-and-error basis, rather than on a legal basis. The government was no longer able to strictly control the media: in the ensuing chaos, the press was the first to gain total deregulation. It initiated the beginnings of a free market.

Political pluralism fostered the emergence of a multi-party press. Different parties established their own periodicals giving rise to a new, politically affiliated, journalism.

The spirit of pluralism in the mass media and the understanding that the importance of each medium was bound to its contribution to social change became a pragmatic guideline for survival and development.

Audience expectations urged journalists to assume the role of heralds of political, economic, cultural, and social change. Striving to keep up with audience expectations and commitment to social change impelled the mass media to generate

examples and patterns of transformation.

### Print Media

The political, economic and ideological heralds of the various political parties engaged pretty soon in a newspaper war. Partisanship in pursuit of daily stories segmented audience reach. Thus, the process resulted in a steady shrinking of newspaper readership. The former political “gatekeeper” seemed to have been quietly replaced by new economic conductors trying to lay down the tempo and harmony for an orchestra of perplexed professionals.

The result of these collective control patterns was ambiguous. Inside, editorial board tensions at covering top-priority events exceeded the range of journalistic self-control; the broader public was often fed tailored information and biased interpretations. It breached the freedom of journalistic expression.

Another perplexing phenomenon was that people began to perceive and assess the processes of change via media models. Without being held politically or socially responsible, the mass media actually shaped the dynamics of public social and political space; its

nurtured pluralism occasionally resembled a labyrinth of one-way streets.

In the process of privatization, powerful economic forces structured the print media market. A new popular press emerged and declared itself politically independent. The tabloid periodicals quickly gained the largest audience share. Their content corresponded to the pragmatic needs and attitudes of the economically active part of the general public. Multiple sections were introduced and these newspapers took over the expanding volume of advertising.

Another group of publications found an audience niche by catering to specific interests and tastes. The most popular topics included leisure, health promotion, cultural events, lifestyles, sports, fashion, hobbies, games, eroticism and soft porn, crime, etc.

These were the main trends in the process of forming an independent, diversified and pluralistic press in Bulgaria. In a short period of time, the tight ideological control over the mass media switched to economic motives. Some pressing factors such as the soaring prices of newsprint, printing services and distribution expenses sped up the process of

catering to audience expectations and needs rather than narrow political interests.

### **Electronic Media**

In contrast to the turbulent, wrenching transformations in the print media, the changes in the electronic media were slower, incomplete and lacked general consistency. The once rigorous regulations at the state level framed the initiatives for decentralization and privatization. The executives in Bulgarian Radio and Television gained some professional freedoms in decision-making, programming and economic policies. However, for a long time the state-owned electronic media remained closely controlled since they were funded from the State budget. A restrictive legislature was another factor in their slow transformation. It aborted early attempts at a substantial and relevant change. The newly adopted Bulgarian Constitution became the first legislative act that abolished the party-state monopoly in the electronic media. The first commercial radio stations began operation at local level in 1992.

Thus, along with the other East European countries, Bulgaria moved to regulate the licensing of private radio and TV stations. A Parliamentary

Commission for Radio and Television and a Provisional Council for Radio and Television became the controlling bodies. The liberalized rules for licensing of local radio and television stations<sup>2</sup> stimulated a rapid development of private radio. The advent of private television occurred two years later.

Bulgarian radio and television stations now operate on two levels: state and private. Bulgarian National Radio and Bulgarian National Television are still the only two state-owned broadcasting organizations which programming covers the entire nation. They are controlled by the National Council for Radio and Television as well as by the State Commission for Telecommunications. In December 1999 Rupert Murdoch's Balkan News Corporation was the successful bidder to become the first private TV operator functioning on a national scale. It had been launched on June 1, 2000.

Fixed time status of the state-owned electronic media management was not introduced until 1997. Until then the executive boards were open to direct political pressure causing overall personnel instability and lack of continuity in programming policy. Continuing

turnover among executives moved by aggressive political pressures on the management of both National Television and National Radio led to general instability. Problems regarding freedom of expression, agenda-setting issues, and journalistic investigative reporting, gave rise to conflicts between professional managers and administrators.

The first licenses for private radio stations were issued to several foreign radio broadcasting companies: VOA, BBC-World Service, Free Europe, France International, and Deutsche Welle. They were appointed because of their sensitivity to the democratization processes in the country. The first domestic private radio station, FM+, went on air in October 1992. The new radio stations developed different formats and styles, targeting different audience niches. They quickly gained popularity. While the national radio channels stuck to information formats; the private stations diversified the program supply, providing the publics with a broader range of commentaries. In addition they felt themselves free to experiment with more flexible and attractive formats and styles. The necessary premises (financial, technological and personnel) for differentiation of the private broadcast-

ing on a national scale were at hand. Nevertheless, the state-owned and operated radio network still holds a commanding lead in audience share at national and local level. The first private television station, Nova Televizia (New Television) was launched in 1994. Because of limited financial, technological and personnel resources, the new television stations stuck to modest programming: movies, sports and imported popular entertainment programs. Later on the audience needs urged the local TV operators to introduce own programs: information, talk-shows, entertainment. The emergence of alternative television encouraged program diversification in the national TV landscape. The reception of satellite, trans-border and cable programs exerted additional impact on the domestic channels programming. Foreign audio-visual products had an equally strong influence on national broadcasting policies.<sup>3</sup> Since the early 1990s the electronic media have been allowed to earn extra financial income from advertising and co-production contracts.

### Radio and Television Guides

The growing diversity of TV programming stimulated innovative inter-media process-

es. Specialized publications on radio and television were initiated, providing the general public with information and commentaries on the menus of the national and local channels, as well as with a selection of foreign satellite offerings.

The most popular electronic media guide - the weekly Radio I Televizia (Radio and Television), enjoys a circulation of 70,000 copies. It offers schedules of radio and television programs supplemented with concise reviews of the offerings.

Another specialized magazine is TV+, launched in 1993. It is 64 pages, issued biweekly and has a circulation of 20,000 copies. The content is predominantly foreign in origin.

The Bulgarski Journalist (Bulgarian Journalist), a 30,000 circulation monthly publication, was the official guild journal that monitored media developments, professional standards, journalistic celebrities, and mass media ratings. However, it could not survive in the new mass media competition and ceased publication in 1995. Contributions to the public assessment of media production are also made by the weekly newspaper, Kultura (Culture) and Media & Reklama (Media&Advertising) magazine, a monthly that cov-

ers the dynamics of the advertising market - the top ten print media shares, the leading top ten advertisers, the top twenty advertised brands, etc.

### Development of Professional Standards

The development of professional standards greatly benefited from the various national nominations for professional accomplishments in the press, radio and television.

Inter-media integration developed through traditional professional contacts, patterns of media consumption and modern advertising and marketing strategies. These joint activities culminated in initiating national media nominations for excellence. Facing turbulent processes of overall deregulation, the professional guild attempted to formulate general rules of journalistic ethics. The vulnerability of the profession encouraged attempts at public discussion. However, the expected common agreement was postponed.

Deprofessionalization trends accompanied the transformation period, but development "demands a central system of control able also to evaluate and set priorities"<sup>4</sup>. Although a number of professional journal-

istic unions were established, they failed to defend basic professional rights and responsibilities. Finally, the professional journalists submitted their freedom of expression priorities for the establishment of an ethical code to the legislative body of the country.<sup>5</sup>

National Radio and National Television maintained the highest rate of audience credibility. According to sociological panel surveys, their ratings scored much higher than the polarized press, the Presidency, National Assembly, Government, and Police.<sup>6</sup>

The social push of mass media in political terms had been manifested at least in seven critical situations:

- The TV attack against President Petar Mladenov in 1990 that compelled him to resign;
- The resignation of the BSP Government headed by Andrey Loukanov in 1990;
- The mass media war launched by the UDF Government of Filip Dimitrov, which led to its toppling in 1992;
- The exit of the Government of Lyuben Berov (under the Movement for Rights and Freedom mandate) in 1994;
- The withdraw of the BSP government of Zhan Videnov in 1996;
- The siege of the House of the

National Assembly in the situation of a governmental crisis in 1997, which led to radical power shift;

- The forced restructuring of the UDF government of Ivan Kostov in 1999, based on corruption allegations.

The invitation extended to Bulgaria to negotiate the terms of joining the European Union (Helsinki, 1999) practically marked the end of the transition status. For the mass media this posed new challenges and priorities. Operating with new-found freedoms, they build up well-differentiated structures at local, national and international levels. This opened doors for integration into different European and global media structures and markets.

The mass media both reflect and instigate social processes and as a system itself, undergoes development changes. As Karol Jakubowicz put it, "change in society triggers media action to influence society or creates conditions in which media can influence society"<sup>7</sup>. The media gain in any transformation process because change means news.

Several main processes in the media system during the transition period in Bulgaria can be discerned:

1. In political terms, decentra-

lization of the mass media system accompanied by the emergence of a pluralistic press, radio and television system;

2. In legal terms, liberalization and deregulation of the mass media system, increasingly corresponding to the situation in Europe;

3. In economic terms, mass media market development in a highly competitive environment at local, national and global level;

4. In social terms, demassification and fragmentation of the publics accompanied by higher selectivity standards and social feedback;

5. In professional terms, departure from former corporate media standards and the introduction of new formats, styles and liberal journalistic ethics.

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# Transformations of the Bulgarian Press

BY TODOR PETEV

---

**I**t has been an uneasy period of Bulgarian press developments: for good forty years newspaper industry has been transformed along guidelines of Communist propaganda priorities. It has schooled the publics by New Speak experiments, public obedience, and strict information diet of wartime type.

Censorship muted most media people, encouraged conformist self-censorship, introduced total surveillance and suspicion in the professional guild. Distorted news bulletins, rumors, false warnings, misinformation, manipu-

lation of the news - that type of information diet had been constructed, followed, and controlled. In absence of an alternative press the publicity resulted in a constructed media world (Fotev, 1999: 232), a public spaces, fed on rumors and diffuse in constellations of controlled small-group networks.

Attempts at diversifying press landscape took place after glasnost and perestroika, launched by Mikhail Gorbachev in 1985. After Chernobyl disaster only reliable and credible sources of information were

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networks of informal contacts and foreign radio stations. The newspapers lost meek credibility they have enjoyed.

### Emergency transformations

**B**y early 1990's direct state control of newspapers and magazines was officially abandoned; first opposition daily newspapers, *Svoboden Narod* (Free People) and *Demokratia* (Democracy) appeared in February 1990. Many periodicals were closed, others changed their names, and new titles entered landscape. Prices of newspapers soared in step with general inflation rate. The prices of newspapers and magazines rose several times and many former readers could no longer afford to buy a second or third newspaper, as it had been common practice before.

Political pluralism followed by pollicentric moves (regionalization) in print industry; both brought about diversification of press at national, regional, and local levels: general output was transformation of political publicity into a matrix of contending fragments of global—local news content..

Many newborn magazines claimed to function as politically independent structures. Their political orientations,

although obvious by reading author's names, lost any clear-cut profile: marginalization became a winning strategy in pursuit of high circulation and advertising profit.

The political shifts were total: author's families had to be changed; newspaper sections, and language styles had been transformed into aggressive forms of "street language" (Znepolski, 1997: 75-88). Nevertheless, certain touch of political obedience, or conformity remained; it had been garnished by economic pressures and a stunning ethnic ostracism (hate language) in print news stories, journalism investigations (mainly crime or suicide stories) and disaster sensitive commentaries.

A perplexing diversity of parties, political factions, civil movements, foundations, business clubs, news organizations, and newspaper outlets emerged in opening public space. The print news media failed in promotion of democratic life and social stability. As Peter Gross observed similar mass media downfalls in Romania: "They failed because they showed intolerance, partisanship, lack of balance and a disrespect for The audience by assuming that it needed to be directed in its deliberations rather than informed. They did

not present readers or viewers with news but rather with views on events and issues of the day, and thus were only indirectly and incompletely informative.” (Gross, 1996: 136).

The aggressive, intolerant style of reporting was conceived as modern trait of professionalism; publishers in their early steps of emerging open press market did not pay due concern to financial matters or to Social Responsibility Journalism as a value-normative orientation towards modernization and developing modern consciousness (Kunczik, 1993: 120-122). Later with advent of commercialization, development of concentration, and true market competition, with growth regional economics - all that emerged as catalyst of a selective social transformation. The split between younger generation of journalists and older groups of media professionals was painfully obvious. The expected re-socialization processes among Bulgarian journalists turned out to be too complex and difficult in diverse media environments and communities (Petev, 1994a: 26).

### Structural Changes

**U**nder the auspices of privatization, innovation and

market self-regulation, aggressive press corporations, such as the German Westdeutsche Allgemeine Zeitung group, established control over two thirds of daily newspaper circulation in 1997; the biggest two print media groups scored the broadest audience reach in this country were bought up, developed, and transformed into a dynamic network of central and local editions.

Advertising took leap accordingly and prospered: profits from it became the main economic resource for print media. Originally the money shares of television and press advertising were in favor of the press. (At the turn of the 2000 their respective shares became almost equal: 53 : 47.) Most of the non-political newspapers raised the bulk of their revenues from advertising.

In the absence of mass media regulations the market opened doors to aggressive moves in the press developments; pornographic editions, virtually unknown before 1989, entered bluntly the opening public space. Institutional attempts to establish certain distribution rules and content restrictions failed. The publishers had found an attractive niche to exploit; they enjoyed unbelievable and never dreamed or anticipated freedoms of

expression.<sup>1</sup> The new titles neglected legislator's attempts to ban any, hard or soft, porn in the public communication space; it had happened not earlier than 2000 when the first legislative acts and the normative professional guide-lines against pornography were coined up and adopted by the National Assembly.

While the daily press was obviously diversified, the youth and children's periodicals shrunk in both number and circulation. According to the National Statistical Institute, 928 newspapers with a total circulation of 654,187,000 were issued in 1993 compared to 381 newspapers with a total annual circulation of 879,663,000 in 1988, before the collapse of the former system.<sup>2</sup> (Bulgarian National Institute of Statistics, 1995) - See table 1.

The number of new newspapers established in the years of the political change and social transformations merits closer elaboration. In 1990 there appeared 81 newspaper titles in the press market. In several years aftermath there took place an eruptive growth of newspaper titles: 103 (1991), 174 (1992) 434 (1993). By 1994, however, saturation trends and shrinking of the press market occurred: only 351 newspapers could be listed.

However, the death rate of newspapers during that time period took a remarkable leap: 303 newspapers ceased publication in 1994. Deregulation of the mass media system in general produced impressive, degrading impacts on the evolving press market.

In 1994, there appeared 781 magazines and bulletins with a total annual circulation of 16,4 million copies. The respective figures for 1999 were 631 titles and 13,5 million copies. (In 1988, before the changes, at the end of perestroika period, there appeared 878 magazines and bulletins having total annual circulation of 69,6 million copies). After 1989, there appeared less magazine titles that had less copy circulation: the magazine reach shrank a bit, the reading public did not change much its magazine consumption habits and patterns. - See table 2.

The early 1990s, opened the deregulation trends in the print media leading to tremendous shifts transforming the press industry. Competition got off to a flying start: it gained additional momentum with the frustrating polarization of the socio-political environment. Aggressive election campaigns in June 1990 and in October 1991 gave a strong push to public discourse and cross-fire

debates that were covered closely by the periodicals. Those were frustrating “golden times” of the contemporary Bulgarian press industry.

Restructuring of the print media market brought to life several types of periodicals. The politically affiliated press seemed to outnumber the others in number of titles (not in circulation, or readership). The strong weekly leader BTA Paraleli (40 pages, fine collar print) enjoyed the broadest audience of close to 100 thousand readers. Fragmentations of the audience in political terms was particularly strong. Deeply biased, the partisan press did not offer balanced information for safe political judgments. The diversity of voices forced readers politically affiliated/or not to read several newspapers in order to orient themselves in the dynamic environment. In general, readers experienced social frustration being manipulated; thus, only a few were able really to pick up the wheat from the chaff.

The public space was deeply contaminated and distorted by rumors, false-event reporting, and misinformation. As Mihai Coman and Peter Gross observed that mass media tend to “raise the false-event, the theoretical discourse, the irrel-

evant daily facts, offer barren interviews, and theoretical analysis. To all of this one can add the almost complete lack of utilitarian news—print and broadcast media seemed to be produced by journalists for journalists but not for people...” (Coman & Gross, 1994).

The bulk of contradictory political views, beliefs and suggested perspectives expressed in the print media badly damaged the press credibility in Bulgaria. A survey carried out by the Center for Democracy Studies on the eve of the parliamentary elections 1991 showed strong indications of lack of press credibility. Only 20.9 percent of the respondents answered “positively yes,” to the question, “Do you trust the information presented in the newspapers?” (Similar was the value of press non-readers). Nearly half (45.8 percent) answered “to a certain extent,” and 33.3 percent of the respondents answered in the negative. Another question asked respondents to voice their agreement or disagreement with the statement, “The television, radio and newspapers strengthen the tension in this country.” Thirty-seven percent (36.9) agreed with the statement and 36.9 percent disagreed. Another 24.1 percent admitted they were uncertain.<sup>3</sup> Urgent need for a social dialogue was strongly felt and

not properly understood by the guild: the partisan periodicals did not provide their readers with unbiased news and opinionating analyses. Perhaps the most telling example of the need for balanced information was shown by the overlap in readership of Democratize (Democracy) and Douma (Word), the political organs of the Union of Democratic Forces and the Bulgarian Socialist Party. A 1993 field survey showed that about 40 percent of the daily readers of Demokratzia read Douma as a complementary information source and about the same number of Douma readers also read Demokratzia. This readership pattern of double checking was considered to generate effects of indirect public dialogue in a gradually politically restructuring society (Petev, 1994:110).

The circulation of the partisan press declined over time: in 1989 Douma sold a total of 198.5 million copies; by 1995 the annual number of copies sold dropped to 25 million. The respective figures for Demokratzia were 76 million (1989) and 15.5 million (1995).<sup>4</sup>

### Postponed Warnings

**T**hree main trends in the development of political life

in Bulgaria since 1993 could be traced in the press:

- deregulated political contention, maintained between and within the major political parties, led to series of splitting and restructuring until certain stability was reached in 1997;
- emergence of a public discourse, understanding and consensus on priority issues like: joining the European Union, NATO affiliation, national security priorities, large-scale privatization, nuclear energy strategy, minority issues, medical care and education standards;
- growing political apathy detached large fractions of intellectuals from the democratization processes; people in general felt tired of claimed democratization incentives (Minev & Kabakchieva, 1996), of the expected, and postponed understanding and appreciation.

The three major trends had been discussed and elaborated in the press. In late 1992, the UDF lost its parliamentary support. The ethnic Movement for Rights and Freedoms (MRF), in a radical move unexpectedly joint the socialist opposition. The democratic majority was toped; the MRF got mandate to form the Bulgarian government.) The partisan newspapers, however, did not uncritically follow the

policies of the political leaders; tensions between the affiliated periodicals and the political leadership emerged. Several editors-in-chief were bluntly dismissed on political reasons. As Ivan Nikolchev observed brilliantly:

“Journalists today do not and cannot have a clearly formed professional awareness as journalists. They rather have a political self-awareness, they see themselves not as creators of information but creators of politics. For this reason they cannot act as a homogeneous professional community, meant to be a comprehensive watchdog, and joint opposition to politicians and government” (Nikolchev, 1998:137).

Those newspapers and magazines that remained closer to the attitudes and tastes of their reading publics, those editors who followed the expectations and political assumptions of their readers, survived, and established brand new patterns for development of periodicals.

The tension between political power holders, and the media guild signaled strive of the print media journalists for an independent Fourth Estate status. The preoccupation of the press reading publics with political news remained a dominant trend. The political news

consumption by social and ethnic groups in Bulgaria became an important predictor for political involvement and participation in the election campaigns. - See table 3.

The most stable political news consumption was affected by the Bulgarian Orthodox readers while the other groups tended to be out of daily reach: the figures of non-readers were much higher for the Roma ethnic group. The press provided dialogue grounds for the contending political players; the assumed function for social integration of the print media in periods of crisis had not been substantiated: centrifugal trends prevailed (Petev, 1994: 105-6).

Irrespective of the economic difficulties in all spheres of public life, all ethnic minority groups (Turks, Roma, Armenians, Jews) issued their own periodicals, usually weeklies or monthlies. Some of them published BI-lingual stories, in Bulgarian in addition to the minority group language; it was considered to serve priorities of a linguistic policy planning which, nevertheless, was of inclusive, integrative type (Znepolski, 1997: 39).

Political confrontation within the Turkish minority organizations resulted in establishing

of two Religious (Mufti) Offices: one which followed patterns of institutional establishment, and the other - of a social movement type. Bough facilitated the change process; they published newspapers under one and the same title, graphic and lexical design, *Musulmanlar*. These periodicals helped mediating the two approaches.

Most popular periodicals elaborated social issues targeting the general public: unemployment and crime. Claiming to pursue consensus frameworks of reference they developed priority issues of the transition to civil society based on destabilization factors: economic insecurity, corporate dependence and personal vulnerability (interpreted as survival by pro-socialist sources).

### **Trends of innovation and concentration**

Several main press groups were founded by media professionals close to private banks, insurance companies, political and trade union establishments. The press landscape showed the following characteristics:

- The largest press group 168 Chassa (168 hours) did comprise a tabloid format daily 24

Chassa (24 hours) enjoying the highest circulation in the country (213,000 copies in 1996), and three more weeklies, one published in English.

- The Media Holding was an established press group which inherited the former trade union daily *Trud* (Labor), one of the most influential independent dailies having a circulation of 182,000 copies in 1996. Another publication of this press group is the *Noshten Trud* (Night's Labor) evening newspaper (73,000 copies). It was the first newspaper, which had been simultaneously printed in two different cities via electronic carriers. Media Holding publishes also the tabloid *Zult Trud* (Yellow Labor) weekly with the highest circulation in the country (238,000 copies in 1995, and about 280,000 in 1999). The periodicals of that press group cater to a wide range of needs, expectations and tastes.

In terms of content, both newspaper groups focussed on government criticism - economic issues, unemployment, crime, and the topic of social consensus.

- The emergence of the Standard News press group challenged the top position of the 168 Chassa group in the newspaper market, introducing color paper, impressive newspaper photography (Hadjzimishev,

1996) and fine print qualities.

These opinionating newspapers presented analyses, topical interviews and journalism investigations, sensitizing the publics for emerging vulnerability or challenges of the young democracy. They used two-sided arguments (in different articles) to foster social discourse attracting large readership. Both (even after the WAZ bought them out in 1998) newspaper groups feature watchdog reporting on state and government institutions - a sensitive role of civic journalism in times of radical political and economic transformations.

It was these two press groups that adopted a new, popular pattern of graphic design, news presentation and dynamic language articulation. They developed the tabloid newspaper format providing readers with matrix of brief information. They introduced modern news reporting, promoted an aggressive style of journalistic presentation, focussed on sensational items. They switched radically from the formal official prose to a more colloquial and narrative, story-telling style in news casting. The tabloids embraced that democratic innovation; it transformed the news sections of the popular weeklies. The emergence of a market-orient-

ed modern press was a productive move in the media landscape. The popular dailies faced off against the two major political party's organs - Douma (58,000 copies in 1996; 35,000 in 1999 ) and Demokratzia (37,000 copies in 1996; 45,000 in 1999). Rather than engaging in partisan political rhetoric, the new popular tabloids developed a broader audience reach exploring agenda-setting and agenda-building functions of their own (Hiebert & Gibbons, 2000: 132-133).

In 1992, immediately after their emergence, the independent newspapers declared economic war on the political press moguls: the objective was to get rid of the state-controlled structures of print paper supply, print services and distribution. Originally, the main target drive was to restructure the newspaper market. And it was done radically by the WAZ corporation. While the political press was preoccupied with power clashes, the independent papers focussed their attention on economic success. Along these lines they scored their first big hits. In just two seasons they managed to find their own sources of newsprint, to establish technologically modern printing house facilities, and to set up a network of distribu-

tors. Thus they gained control over the entire market-oriented cycle. It helped to attract a growing number of advertisers and sponsors. Their sweeping market success of popular press left little opportunities for the emerging quality periodicals.

### **Striving for a Bid Greater Than Mere Survival**

**N**ewspaper readers pretended to lack serious broadsheet; newspapers that present credible hard news, interpretive and opinion journalism. Nevertheless, the general public enjoyed the tabloids of WAZ. Originally the readers did not care for a 'serious press' which does not blur together the news and their interpretation. A creative mix of both opened doors to speculations and rumors: fuel and the outcome of the independent popular tabloids. That confusing mix of rumors and unconfirmed information generated sense of general social insecurity, even physical vulnerability, spotting and attacking any structure of social stability. The expectations became poorer than the plain reality.

There was no evident need for quality press; in financial terms it had been evaluated as

a high-risk strategy to invest money and efforts.<sup>5</sup> The common low credibility of the political and sensational tabloids did not disturb newspaper publics at all: they enjoyed the chance to exercise again reading between the lines. As they used to do in the blurring years of perestroika.

The first two quality dailies, Continent and Pari (Money), were established in 1992. Continent<sup>5</sup> was a more traditional black and white broadsheet newspaper while Pari was a tabloid printed on colored paper. These two dailies followed established West European newspaper journalistic standards. They featured contributions from many of the best columnists and commentators. Their target audience was similar, one more reason why both failed to attract large, stable readership. The general public enjoyed simple language used by the tabloids; it was schooled to consume hard news, flavored seductive ads, and sensational stories of the popular tabloids.

Initially these newcomers to the newspaper market were not considered to be competitive threats to the large-circulation papers. This "benevolent" posture opened an opportunity for two additional quality newspapers to enter the

market. The Cash and Capital, two weeklies funded by foreign investors joined the Bulgarian newspaper market in 1993.

High quality standards were demonstrated by special interest magazines, like Sega (Now), a political digest and Otechestvo (Fatherland) that had good readership, but did not attract enough revenues from advertisers and closed. High-quality newspapers and magazines were often used as alternative sources of information and opinion guidance by the reading public. Opinionating seemed and is a risky business unless you enjoy support by political or/and economic circles. It was, therefore, difficult for them to gain stable readership<sup>6</sup>, to attract advertisements and to survive.

### Challenges for a freedom press development

**E**conomic, political, and professional bottlenecks could be encountered in the processes of emergence of the new press:

- printing facilities and paper supply were distributed by a post-socialist bureaucracy, and operated by the former elite;
- structural changes in the journalism guild were felt, following especially the deprofessionalization process of employ-

ing qualified young journalists who were considered to be easily manipulated;

- foreign players established rules of their own in the media market irrespectively;
- move to press freedom and skipping political controls was blocked: the political pressures had been transformed into economic ones, and functioned simultaneously.

These issues, however, generated clearly positive effects. The issue of deprofessionalization of the journalistic guild (Kunczik, 1993: 122-123) stimulated a climate inviting innovations, mass media had been regarded as open agents of modern consciousness.

The scope of the popular press was broadened by newcomers like Novinar (1997), Sega (1998) and Monitor (1999). This group of dailies offered their readers pragmatic information, hot news, setting the agenda for their readers to cast their opinions and attitudes actualized by news consumption.

The decentralizing trend in the press market helped energize the local press. The new publications survived the economic recession and some titles demonstrated stable growth. They enjoyed the confidence, loyalty, and support of their audiences mainly because they

had dealt with, and focussed specifically at emerging local social and ethnic issues.

Another group of independent periodicals encompassed a broad diversity of specialized topically periodicals; leisure, culture, fashion, feminine issues, health care, religion, entertainment, sports, eroticism, hobbies and so on. Most of them had low circulation, some of them presented special professional design and original content.

The same held true for the periodicals aimed at age and gender audiences. It was among has group of publications that a new type of celebrity-oriented and erotic magazines could be encountered; a Bulgarian version of "infotainment."

A specific group of publications is targeting foreign information consumers via periodicals issued in English, German and Russian. They are distributed in Bulgaria and abroad, thus facilitating cross-boundary business networks of commercial exchanges.

Media & Reklama magazine publishes regularly data reports on media consumption. Balkan Media is the first Media magazine in the Balkans published in English.

## Emerging marketplace of ideas

The annual ratings of the top ten newspapers in Bulgaria became a telling indicator of public and professional evaluations, as well as a meaningful index for advertising industry. Who was the winner? Professional development was encouraged by national nominations for high journalistic and/or advertising accomplishments. It set up international professional standards and the national ethos of the print journalist community.

On the other hand, the ratings stimulated competition and innovative aspirations. The conquest of the press market developed a kind of a hybrid of the tabloid: a working combination of the popular tabloid format (which mixes fact and interpretation) and sections of "serious publications", ideological and financial in topics domain (Spasov, 1999: 120).

A number of demographic and sociological surveys (of MBMD or the National Center for Public Opinion Surveys) confirmed that readership of the national dailies varied strongly among different segments of the general audience. The sociocultural backgrounds for age cohorts of reading publics

was generally different. Traditionally, reading newspapers was an important part of the male subculture. Readership was also considered to be a strong indicator for more intensive participation in the political life.

By tradition "political will" was regarded as a male culture domain. The outcome of political moves-the anxieties of day-to-day survival- seemed to have been left to women who are treated as "second class" social subjects. No wonder they were much more distanced from reading the press. - See table 4.

Almost all-Bulgarian periodicals modernized their graphics and layout. The language and syntax by all publications became closer to the everyday speech of the readers.

Most of the newspapers now feature various themes such as corruption of civil servants, executives linked to shady economic groups, the looming Mafia presence, "white collar" crime, sexual quirks of public figures, piquant stories of life at the top. Newspaper space was dominated by an avalanche of news and commentaries that carried a message of the publicly shattered confidence in the state as an organizing institution. It was Douma, the BSP newspaper

flagship, that tried to uphold the social and political identity of the older generation; not to degrade its social biography. This explained the large share of older readers of the socialist daily. Any change in that closed community would have meaning of a painful revision of the past beliefs, with no chance for providing certain new perspective. While readers of Douma still did tend or seemed to be under the power of stereotypes created by the authoritarian propaganda during the regime, the young reading publics gravitated to modern news values, pragmatic styles of tabloid journalism. Essentially, it were the young readers who generate the nucleus of the reading public at the turn of the 21<sup>st</sup> century.

At election times newspaper audience functioned as a coercive or corrective factor of the incoming social changes. The same held true for the popular magazine readers, as well. That boosted the press market growth; it sprang up at really a unique pace. - See table 5.

The data in Table 5 show that even politically affiliated (biased) dailies serve as open "marketplace of ideas". The Kramer's correlation coefficient is very high; publics do share political points of views; thus, they contribute to social dia-

logue and slowly emerging agreement.

“The social reality is unthinkable without its immanent virtual dimensions, wrote Georgi Fotev, without social imagination as a constructive principle /.../ The responsibility of media goes further than (currently) available and prominent journalism catches “work” of memory and possibilities. In such a way it becomes involved in constructing and in the re-construction of the social world” (Fotev, 1999: 239).

The identity crisis experienced by newspaper audiences generated strong affiliation of supporters. The observed differentiation trends (toward greater individualization and localization) demonstrated identity crisis in press development.

Understanding differentiation processes seemed to be the basic point of departure which had been considered as a side-product of newspaper contentions.

Understanding the differentiation trends the press, as a whole, aimed at shared identity legitimization, mutual recognition (not appreciation!), and an agreeable consensus in this part of the Balkan region.

The growing competitive news-

paper market attracted strong British, Swiss, and Austrian investors. In 1997 the German Westdeutsche Allgemeine Zeitung (WAZ) bought controlling interest in the two leading newspaper groups in Bulgaria; 168 Chassa and Media Holding. These newspaper groups operated about two thirds of the circulation and the advertising revenues in the press market in 1997.

The WAZ combined their advertisement policies, publishing the same ads in all of their dailies down the country. This control of advertising and newspaper circulation violated the anti-monopolistic law. Two years later, in 1999, WAZ transferred part of its ownership to Swiss and Austrian companies as to avoid eventual prosecutions under the law.

The recent changes in the press industry did not encourage professional integrity, autonomy, professional standards and ethics.

Most of the Bulgarian journalists “were facing a difficult choice between working between working under political or commercial pressure. Sometimes they did not even have this choice but faced both” (Nikolchev, 1998: 198). Destabilization meant

money, erosion of social norms and professional standards.

### Conclusion

The evolution of the press system in Bulgaria in the 90's demonstrated the following trends:

- Booming polycentric and pluralist diversity of political, popular, quality and topical periodicals;
- Privatization leading to establishment of print media markets at national and local level;
- Concentration of ownership, emergence of international media corporations in national media landscape;
- Adoption of professional patterns (global and local) for regular news presentation;
- Introduction of new formats and standards, including sensationalist, entertainment, and business styles.

The segmentation of the reading audience diversified the press consumption patterns and encouraged pluralistic values aiding the process of social transformation. The press industry experienced general deregulation. It encouraged diverse change gaining shifts. Deregulation and destabilization turned out to be a winning strategy: it meant more money; it provided high press circula-

tion, stable news consumption, and restless readership.

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## NOTES

1 The first journalists working for soft porn press had been hired from former communist youth and children press. Those who have been trained to maintain political socialization in years of transformation undertook de-socialization attempts.

2 Bulgarian National Institute of Statistics, Sofia, 1995, p. 57.

3 Field Survey of Center for Studies of Democracy, Sofia, 1991.

4 Bulgarian Book Data (1995). Sofia: St.St. Cyril and Methodius National Library.

5 The author had been Chairman of Publishing House of The Continent, first quality daily newspaper in Bulgaria (1992). It had been published in 32 pages, broad sheet format, and using balanced news coverage. It failed to survive a premature trial to develop social dialogue.

6 Bulgarian National Institute of Statistics, Sofia, 2000, p. 40.

TABLE 1. DYNAMICS OF THE NEWSPAPERS' LANDSCAPE IN BULGARIA

YEAR	NEWS-PAPERS total	TOTAL CIR- CULATION thousands	DAILIES	TOTAL CIR- CULATION thousands	WEEK- LIES and OTHERS	TOTAL CIRCULATION thousands
1988	381	879,663	20	692,230	361	187,443
1989	301	895,265	17	687,638	284	207,627
1990	540	1098,632	24	804,964	516	293,668
1991	727	519,718	31	334,857	696	184,861
1992	917	616,030	46	393,284	871	222,746
1993	928	654,187	54	423,471	874	230,716
1994	1059	611,358	68	389,699	991	221,659
1996	920	470,814	51	339,016	869	131,797
1997	673	383,765	42	297,759	631	88,006

TABLE 2. DYNAMICS OF MAGAZINES' LANDSCAPE IN BULGARIA

YEAR	MAGAZINES AND BULLETINS	TOTAL CIR- CULATION in thousands	NEW MAGAZINES	NEW BULLETINS
1988	873	69,599	2	-
1989	827	57,849	1	4
1990	834	47,960	7	6
1991	728	18,674	31	32
1992	681	23,759	41	31
1993	777	31,901	72	60
1994	699	21,455	62	94

**TABLE 3: READERSHIP OF POLITICAL NEWS BY ETHNIC GROUPS  
IN THE PRESS AUDIENCE (1993) (%)**

Audience Activity	Ethnic self-identification				
	Bulgarian	BG Turk	BG Moslem	Roma	All
Every day	44,2	22,4	19,2	10,0	41,8
3-4 times	15,0	12,1	7,7	10,0	14,7
1-2 times	27,6	24,1	46,2	30,0	28,1
None	13,2	41,4	26,9	50,0	15,4
Total	100,0	100,0	100,0	100,0	100,0

**TABLE 4. ANSWERS TO THE QUESTION "WHICH IS YOUR NEWSPAPER?"  
ACCORDING TO THE AGE INDICATION OF THE RESPONDENTS (%)**

Dailies	Age Groups				
	18-29	30-39	40-49	50-59	60 and over
<i>24 Chassa</i>					
<i>Trud</i>	28.7	23.0	23.6	13.0	11.8
<i>Douma</i>	21.7	18.2	28.9	14.7	16.5
<i>Demo-</i>	3.5	3.9	3.4	30.0	59.2
<i>Kratzia</i>	13.8	23.7	20.3	19.1	23.2
<i>Standart</i>	28.6	26.5	27.7	4.6	12.6
Local Newspapers	14.7	21.9	20.1	21.3	22.1
No newspaper preference	18.5	14.2	13.8	12.0	41.5
Do not read newspapers	20.9	17.3	18.1	15.9	27.9

TABLE 5. READERSHIP OF "DEMOCRATZIA" AND "DUMA" DAILIES (1993) (%)

"Duma" readership	Readership of "Democratzia"				
	Every day	3-4 times	1-2 times	Less	All
<i>Every day</i>	41,1	10,0	0,0	21,9	21,2
<i>3-4 times</i>	10,7	70,0	6,6	6,7	13,3
<i>1-2 times</i>	8,9	10,0	46,7	7,6	15,9
<i>Less</i>	39,3	10,0	46,7	63,8	49,6
<i>Total</i>	100,0	100,0	100,0	100,0	100,0

Chi-Square 120,1 d.f. 9  $p < 0,000$  Cramer's V 0,421

# The Dynamics of the Electronic Mass Media System in Bulgaria (1989-1999)

BY LILIA RAYCHEVA

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## The Radio

Radio broadcasting in Bulgaria was a State monopoly right from the very beginning of its existence in 1932. Until 1991 there was only one, Sofia-based, central broadcasting station (operating four channels) and five regional stations. The liberalization of radio broadcasting was a much slower process than that of the print media.

In 1989 the State Committee for Postal Services and Telecommunications developed the technological and general framework for FM-range private radio broadcasting.

As early as 1991 two pirate stations began broadcasting, but they were banned from operating when the distribution of broadcast licenses was enforced. Licensing was subject to the Provisional Council for Radio Frequencies and TV Channels established at the beginning of 1992. The chairpersons of Bulgarian Radio and Bulgarian Television were nominated by the Parliamentary Commission for Radio and Television and approved by the National Assembly. The halfway policies of the state bodies however did not prove very productive.

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By a decision of the Grand National Assembly on March 6, 1991, Bulgarian National Radio and Bulgarian National Television were proclaimed to be "independent institutions" largely financed by the State budget. This set up the beginning of transforming the state-owned and controlled stations into public ones. By adopting the Radio and Television Act of 1996, a National Council for Radio and Television became the official body to deal with program licensing, program monitoring, sanctioning irregular advertising practices, and appointing the chairpersons of the state owned electronic media. According to this law, the National Council might also revoke licenses of stations already on the air. The Act also outlined the basics of transforming the electronic media from state-owned to public ownership.

In terms of ownership, there are three categories of radio broadcasting stations in Bulgaria: state, commercial and public (still less developed).

Private radio broadcasting in Bulgaria was launched after licensing of foreign radio networks such as The Voice of America, BBC-World Service, Free Europe, France International and Deutsche

Welle. The first home-owned private radio station, FM+, licensed in 1992, paved the way for strong competition on air.

The availability of highly qualified radio professionals, affordable FM radio equipment prices and the growing desire of local communities to enjoy their own radio channels, focused on local events and issues, contributed to an unprecedented boom in private radio. Audiences gained access to alternative sources of information. While state-owned radio stations gave priority to hard news coverage, the journalists working for private radio stations presented pluralistic views and commentaries. Furthermore, the introduction of specific audio styles close to everyday language patterns became an important factor for a closer grip on audiences. Private radio stations which concentrated on monitoring current issues of local communities successfully met listener's expectations.

Competition among the national channels and private radio stations unfolded in at least two dimensions. First, there was competition to attract and stabilize their audiences. Second, there was competition to locate and target advertising profits. In this

competitive environment, private radio stations developed their dynamic and distinguishable profiles, an advantage over state owned radio.

In the meantime, Bulgarian National Radio underwent significant changes in its own right. The four nation-wide channels shrunk to two 24-hour channels, including regular transmissions from regional stations. Consequently, the regional stations' share of audience increased and the structure of their programs was considerably diversified. At the same time, Bulgarian National Radio also had to change its program content and formats.<sup>1</sup> Several telling trends in radio program dynamics could be discerned during this period of transition. - See table 1.

The strongest trend was the enormous increase in radio broadcasting. In 1988 some 46,810 hours of programming were aired. In 1989 the number had increased to 48,498 hours; in 1992 there were 52,833 hours. In 1993 the inclusion of private radio bounced the total number of on-air hours to 161,278. By 1997 the public was enjoying 314,773 hours of programming, nearly seven times the number of hours broadcast in 1988.

Another trend denotes the growth in diversity of program supply. The structure and formats of the programs were changed. Within one year, the number of news programs increased dramatically - from 19,090 hours in 1988 to 26,154 hours in 1989 and 85,062 in 1997. The increase was particularly significant in commercials. From 1993 to 1994 there was a 44 percent increase, and by 37 percent from 1995 to 1996; a decrease of seven percent was shown in 1997. Entertainment programming for the period 1993-1994 increased by 31 percent and from 1995 to 1996 there was only a two-percent increase; the increase bounced up 27 percent in the period 1995-1996 and from 1996 to 1997 there was a modest increase in entertainment programming of five percent.<sup>2</sup>

A major shift in radio programming followed the introduction of new radio formats. Weekend programs on state owned radio channels developed extensively by giving much more time to entertainment, culture and leisure programming. The introduction of economic and business news programs, combined with topical radio shows, another novel element, vitalized radio consumption. Emphasis was put on pragmatic, instructive

information such as job announcements, business activities, entrepreneurship, health promotion and road safety. The radio programs, especially the late talk shows, developed a pleasant hedonistic streak, friendly language and discourse, different in content and style from the previous radio diet. Music selections followed along the same functional guidelines, aiming at relaxation, sharing, mutual understanding, increased social sensitiveness and amusement. The talk shows turned out to function as the most effective change. They served as a market place for identity demonstration, understanding and co-orientation. Leading professionals could easily weather circumvent bureaucratic delays in state radio by quickly switching over to private electronic media, followed by their fans.

Private radio broadcasting developed explosively in Bulgaria. According to Committee for Postal Services and Telecommunications data, licenses for 54 local FM stations and 60 cable radio operators were issued in 1995.<sup>3</sup>

Contrary to initial expectations, strong competition between the private Bulgarian and foreign FM stations did not materialize. The public

tended to use the stations for complementary sources of information and entertainment. It could be assumed as a pivoting trend that in the course of further fragmentation of the audiences, state-owned radio would suffer still greater audience losses.

Developing a clear-cut public profile is the current priority of local radio stations. Most of them did quite well, others had to reconsider their entire programming formats, time slots, targeted audiences and communication styles in order to survive. Reaching the audience (within a radius of eight kilometers, according to the new regulations) was the primary concern of the programmers. Another concern was to define the socio-economic demographic profiles of the radio listeners as an important factor in developing advertising strategies. Third, the managers of small radio stations chose to co-operate in their competition with state-owned radio in order to attract broader audiences. And finally, private radio stations introduced technological innovations such as computer-run radio programs.

For the purpose of successful competition with Bulgarian National Radio, the Union FRANK was established in the

fall of 1993. The Union included FM+ in Sofia, TNN in Plovdiv, Galatea in Varna, Glarus in Bourgas, Pristis in Rousse, AURA in Blagoevgrad and BIMAKO in Sliven among others. The goals of the Union focused on program exchanges, shared data from sociological surveys and simultaneous advertising. This cooperation shows how private radio stations can compete for advertising revenues with state-owned radio.<sup>4</sup> The tendency for cooperation developed further in establishing the Association of Bulgarian Broadcasting Radio Organization (ABBRO), combining 94 private radio stations.

After 1985 the programs of the local cable radio stations run by city, town and village councils underwent particularly significant changes. Their programming ideology was simple: keep down-to-earth and give high priority to local community issues. Their program strategies were not to target all the listening public, but every individual listener. This highly personalized approach consolidated the audiences of the local cable radio networks, so their audiences remained more loyal than did those of National Radio.

Early in the 1990s the emerging public radio sector inherit-

ed a well-developed cable network with thousands of subscribers including local post offices, hospitals, railway stations, banks, enterprises and various offices of local administrations. Most of the stations gained strong support from the local communities, developing in terms of programming and technological facilities. Student-run radio stations extended the public radio family, ALMA MATER at Sofia University and AURA at the American University in Blagoevgrad. Largely young professionals or graduate students from the School of Journalism and Mass Communication at Sofia University carried out the innovative movement in public as well as in private radio.

Parallel to the developing radio broadcasting dynamics in Bulgaria at state, private and public levels, a disturbing situation became apparent. Parts of Bulgaria's territory is covered by radio and television transborder flows<sup>5</sup>. An alarming circumstance was massive intrusion of Turkish broadcasting into Bulgarian frequencies in violation of the Stockholm (1961) and Geneva (1975 and 1984) Conventions. Furthermore, illegal relay stations operating on Bulgarian soil were airing Turkish programs.

Observation of the radio broadcasting business in Bulgaria revealed a diversity of trends and approaches in modernizing radio communication in the country. These trends and approaches among state, private and public radio broadcasting included multiple financial support, organization, program schedules, journalistic styles, personnel management, marketing policies and digitized technologies. In general, the flexibility of the small and dynamic radio stations and the audience's fascination with the youthful voices and styles allowed them to rapidly gain audience share from state-owned radio. Before 1989, listeners sought reliable information from foreign sources; now they relied on domestic private radio stations as alternative sources to state-owned Bulgaria National Radio. The sacking of independent journalists further weakened the credibility of state radio.<sup>1</sup>

The new radio stations developed a clear-cut media identity thanks to their support for democratization. The growing credibility of their transmissions considerably expanded their audience reach. Their zenith occurred during the January 10-12, 1997 political crisis. Darrik Radio seized the opportunity for greatness with

its extensive, live coverage of the ongoing dramatic clash outside the Parliament building. Darrik Radio's live reports of the clashes were officially blamed by the government for encouraging and coordinating the social protests.<sup>6</sup> - See table 2.

Private radio stations clearly worked to sustain the emerging civil society. They helped people weather the moments of crisis. If one has to decide which medium had "the most human face," private radio with its active listeners' feedback undoubtedly would be the winner. It is by no means accidental that all taxicabs and public transport vehicles were tuned to private radio stations during the 1997 crisis, which opened the eyes and ears of an otherwise isolated people.

Another important factor for the growing strength of private radio is advertising. The advantages of local radio are quite obvious in this respect and it quite naturally claims an increasing share of the advertising market.

Private radio is developing in a highly competitive media environment. It competes with national channels as well as with foreign radio stations. Competition and the resulting

diversity of radio broadcasts results in bringing radio broadcasts closer to the people during the difficult period of transition.

To sum up, several features can characterize the changing radio landscape in Bulgaria:

- An established set of legal regulations;
- A general restructuring of the national radio system in state, public and private broadcasting stations, operating at the national and local level;
- Segmentation of radio audiences, maintaining a high degree of credibility with the audience;
- Introduction of new styles, formats and standards.

The pluralistic approach to radio program supply and consumption catalyzed unique ties between the radio stations and their audiences, broadening social dialogue at different levels and thus vitalizing authentic democratization processes.

### The Television

**T**elecasts in Bulgaria first began in 1959 with three hours' programming twice a week. The number of registered TV sets then did not exceed 600. It took about 10

years before the whole country was covered by TV signals. Color telecasting was introduced in 1972 and in 1975 a second national channel was launched. For years Soviet Television was retranslated and run on Fridays in place of the First National Channel. A correspondent's bureau in Moscow selected, translated and dubbed Soviet TV programs. It also produced original programs in Bulgarian.

In the mid-1970s a network of four local TV stations was established. County correspondents provided films and videotapes with local news. The TV news service was backed by foreign correspondents working in Berlin, Paris, Warsaw, Prague, the Middle East and Japan. Most of the foreign news coverage was supplied by Intervision (the former international TV organization of socialist countries) and Eurovision.

Compared to the other media, changes in television came much more slowly. Some major reasons for the slow transformation included the state monopoly over national telecasting, political pressures resulting in frequent replacements of TV executives (in ten years, eleven General Directors in succession headed National Television), lack of

research and development concepts and strategies, inefficient management, economic constraints and obsolete equipment.

Despite the slowness of change, television did undergo significant transformations from 1989 to 1999. In 1992 the two national channels were separated into competing units. Channel One and Epher Two each established its own financial, structural and program policies. Many of the departments of the former system were closed or modified and new ones were established. In this process hundreds of qualified personnel lost their jobs, some of them owing to a political purge.

After seven years of unfruitful discussions of several bills, the National Assembly adopted the Radio and Television Act in 1996. The road of transition proved rather difficult with respect to legislative regulation of the electronic media. Many political reasons added to the delay in legislative reform. A Parliamentary Commission for Television and Radio was set up in 1990 to propose an Act for radio and television. The final part of the new Constitution of the Republic of Bulgaria contains text according to which the Parliamentary Commission is

to exercise control over the national mass media (radio, television and the telegraph agency) until the adoption of any legislative regulation. This was one of the basic reasons for the delay of the Radio and Television Act. The most important contribution of the Parliamentary Commission was the adoption of a Provisional Statute of the Radio and Television.

The Commission also approved coproduction principles and advertising norms. Currently Bulgarian National Television operates on a dual economic structure. Although state owned, it is not totally funded from the State budget. The principle of coproduction allows an inflow of private funds and an increase in advertising profits. Advertising has been the principal source of income in addition to budget allocations. Coproductions and sponsorship have also produced income.

The guidelines adopted for advertising set out the basic principles and formats of TV ads and specified their time slots. But, the inconsistent guidelines and the general economic crisis in the country were the main reasons for stagnation in the TV advertising market. Advertising prof-

its amounted to \$27 million USD in 1995. Coca-Cola, Unilever, Phillip Morris, Procter and Gamble, BAT and WS Teleshop were the largest foreign advertisers. The biggest domestic advertisers included banks, insurance companies, different enterprises, and the state lottery.

The two state channels received quite unequal shares of advertising profits. In 1995, Channel One, covering almost the entire country with an audience incomparable to the other state channel, received US \$22 million. Epher Two got US \$4.5 million and the only private station; Nova Televizia received only US \$0.5 million.<sup>7</sup>

Coproduction in Bulgarian National Television was used to reinforce organizational efficiency in order to cope with growing financial shortages. It gave established professionals a chance to enjoy greater freedom in their creative undertakings. While the private companies provided funding, the television station ensured production facilities and television crews. However, the flexibility was gained at the cost of controversial contracts because of a lack of strict financial and advertising regulations. Thus, some producers managed to exploit the nation-

al airwaves for private financial ends.

The financial impact of sponsorship proved to be meager. The tax regulations existing in Bulgaria at the time did not encourage sponsorship activities as much as investment in science and culture programs.

Although telecasts increased by more than 1,000 hours (8,032 hours aired in 1995 versus 5,918 hours in 1988), the technological equipment was outdated and unreliable functionally. Thanks to advertising revenues, new production facilities and information technologies were built.<sup>8</sup> Thus a contemporary equipped newsroom and one of the most sophisticated post-production studio complexes in Eastern Europe were constructed for Bulgarian National Television.

Since 1993, the capacity of the four regional TV centers has been used for airing local programs on Channel One. The Russian Television-Ostankino, aired on separate channel as well as TV5-France International, which shared another channel with CNN, ceased to be aired in Bulgaria in 1997 due to financial reasons.

The statistical reports on TV subscription presents the TV

reach. However, this general statistical data could hardly show the current growth of the television market. Many households avoid declaring their TV sets and paying fees.

A national sociological survey<sup>II</sup> reports the following data about the distribution of television sets in operation:

No TV	3.3 %
One TV set	68.6 %
Two TV sets	23.8 %
Three or more	4.3 %

According to the same survey, in 1994, the year of licensing the first private television station, about 43 percent of the TV-equipped households used black and white sets, 68 percent enjoyed color telecasts and some had both black and white and color sets. Those connected to a cable network comprised only 1.4 percent of the households, 2.9 percent used collective satellite antennae to watch foreign TV programs. One-fifth of the households possessed video players or video recorders. According to the findings of this survey, the usual television consumption was 2.5 hours weekdays, 4 hours on Saturdays and 3.5 hours on Sundays.

The Radio and Television Act opened venues to transform the state-owned electronic

media into public operators. This gave a strong impetus to introducing new program providers through open competition. The second nation-wide channel was licensed to Rupert Murdoch's Balkan News Corporation in December 1999. The processes of re-licensing the functioning TV cable operators enlarged and stabilized the openness of the radio and television consumption.

The changing television landscape in program category terms, according to the annual data supplied by the National Statistical Institute is notable. - See table 3.

A dramatic growth of 500 hours of telecasts occurred during the critical year of 1989. By 1994, when private television was officially introduced and cable operators were practically ahead of the legislative regulations, major changes occurred in Bulgarian National Television no matter how slow and inconsistent they had been up until then. The increase in imported programs was impressive. In 1994 there were 2,618 hours of imported programs, more than a 1,100-hour increase over 1989. News show programming on Bulgarian National Television showed a steady increase until 1994 when a

drop of 42 percent to 832 hours compared to 1,433 hours in 1993 was observed. By 1997 the news bulletins on all TV stations amounted to 23,585 hours. Advertising also increased from only 34 hours in 1989 to 159 hours in 1994 and 5,648 hours in 1997. As might be expected, the greatest growth was in entertainment programming. Entertainment programming increased from 2,769 hours in 1989 to 3,463 in 1994 and to 132,349 hours in 1997. Religious programming increased from zero in 1989 to 31 hours in 1994 and 257 hours in 1997.<sup>9</sup>

Since 1990 political advertising and political campaigning have been regular features on television. The first live television debate between presidential candidates was seen on January 10, 1992. Political campaigning time-slots on state-owned TV ought to follow strict quotas and regulations; no such limitations applied to private television.<sup>10</sup>

The national TV channels tended to telecast a comparatively small share of imported, but diverse in origin programs. - See table 4.

In 1994 the shares of imported programs aired on Epir 2 were:

US productions	31.0 %
British	19.5 %
Italian	9.8 %
Russian	8.5 %
Spanish	5.8 %
French	5.5 %
Polish	4.7 %
Greek	3.4 %
Other	12.0 %

Now, the share of imported programming surpasses the share of domestic production. At the emergence of private telecasting in 1994 the new channels' program supply was predominantly foreign in origin. The current tendency is the reverse; program content includes a growing number of domestic production.<sup>11</sup>

If 1994 is remarkable for the development of the TV market, it is also regarded as a landmark of liberalization of telecasts in Bulgaria.

Nova Televizia (New Television), the first private TV station, was launched in 1994. Its basic program content consisted mainly of imported and domestic drama and movies. The opening of 7Dni (7 days) TV station in 1995 signaled the beginning of competition in telecasting in Sofia. As an alternative source of information and entertainment, the private television channels attracted the publics. Private television developed

24-hour programming, targeting diverse potential audiences. Such an approach, however, did not encourage high quality. Most of the programs were cheap imported productions mostly from North and South America and Australia. The TV audience because of their common-denominator emphasis on violence and action appreciated them. The saturation of private TV with such cheap audio-visual products often dimmed their original journalistic achievements. Nevertheless, the presence of private television diversified the landscape of programming.

The existing local TV stations and cable TV operators are in the process of re-licensing. Bulgaria is among the first countries in Eastern Europe to regulate the receiving of satellite signals via individual antennae. The country also holds a license for a satellite transponder, which airs the Bulgaria satellite channel.<sup>12</sup>

In general, deregulation of the electronic media system in Bulgaria diversified program supply, encouraged higher audience selectivity in program consumption. The institution of Bulgarian National Television attained high confidence and credibility. A representative sociological survey carried out by the National

Center for Public Opinion Studies in May 1996 shows high credibility in Bulgarian National Television (55.6 percent) as source of reliable information. The Bulgarian National Radio has much lower credibility (37.9 percent) of the national audience above 18 years. Nearly a quarter (23.1 percent) gives the mass media no credibility at all and 11.1 percent do not follow the mass media.<sup>13</sup>

The telecasting panorama in Bulgaria during the last decade was subject to significant changes at the national and local level. While the transformations in state-owned TV were painfully slow and contradictory for many reasons, the private broadcast and cable channels made a good use of deregulation to claim their market shares in a short time. Commercialization of TV channels offered them much better chances for advertising. They proved to be creative, aggressive, efficient and flexible partners, increasingly attracting advertisers.

The new TV channels launched new styles and formats, which at first might have seemed amateurish but quickly acquired professional quality. The disregard for State gatekeeping and self-censorship practiced by

Bulgarian National Television enabled them to act faster and more efficiently.

The catch phrase of one of the former national TV executives, "Television follows the winner," had squeezed the most powerful medium in the country into a corset of self-restriction. Expectations, actual or anticipated, encouraged self-censorship in journalists who held privileged jobs at the national medium.

A case study of the national TV channels censoring themselves was their running of animated cartoons during the turbulent events accompanying the critical Parliamentary discussions on January 10, 1997. The cameras covered the discussions in the Parliament but never turned their lenses to show the protesters' unrest outside the building. At midnight, while MPs and journalists were still besieged in the Parliament, Channel One of National Television, instead of showing the earlier promised report, wished its viewers a good night and signed off. Fragmented scenes of the clash in front of Parliament, shown on Epher-2 only contributed to information havoc. It prompted people to go outside and search for themselves in a situation of information blackout. Both National

Television and the private television stations indirectly and unintentionally had contributed to the generation of additional tension; they escalated the social protest.

The summer of 1990 witnessed a similar manipulation. The TV program was interrupted by an announcement that a protester threatened to set himself on fire. Many people rushed to the square in front of the Bulgarian Socialist Party House. The tension escalated into turmoil and the building was set on fire. Thus the Bulgarian National Television generated information obscurity and social insecurity.

Both the 1990 and 1997 incidents pushed people out into the streets to see what was really happening. National Television, by not broadcasting the entire story, manipulated their "moments of madness".<sup>14</sup>

On several occasions intolerant controversy between the two main competitors (the BSP and the UDF) flared in their televised political campaigning. The most significant clash occurred when the BSP aired an aggressive sequence of a young UDF leader with a clip from Bob Fosse's film "Cabaret" depicting the Hitler

Jugend in Germany. In its next scheduled program, the UDF fired back; it showed a videotaped remark uttered by the Bulgarian President, Petar Mladenov at a December 1989 anti-Communist rally. The phrase was "Maybe it's better to call the tanks." This controversial remark later ignited a student strike forcing Mladenov's resignation. For the first time, television manifested its power to catalyze fundamental shifts in political life. It also showed how readily the electronic media could be politicized during times of turmoil.

Several development trends can be distinguished in the TV system over the past ten years:

- Fundamental restructuring of the TV system at local, national, international and global levels;
- Commercialization of television broadcasting and development of private cable operators;
- Diversification of program supplies in emerging audio-visual markets;
- Increasing segmentation of the television audience;
- Maintaining a higher degree of audience credibility than other mass media;
- Development of new styles, formats and standards.

## Conclusion

The transition to a civil society and market economy involved a number of issues in mass media development. These included the general insufficiency of financial, technological and professional standards. The development was additionally slowed by delayed media legislation, aggressive political behavior and an underdeveloped media market.

Nevertheless, the mass media system was the first to undergo profound changes in structure, management and social functioning. Media competition stimulated the first dynamic open markets in this country further stimulating the already well-developed media consumption.

Decentralization of the electronic mass media underwent a slower pace of transition. The pluralism in radio and television broadcasting was fostered by the private broadcasting and cable enterprises. The local electronic media transformed into factors with growing importance. The state-owned radio and television channels gained some freedom and lost their privileged position and social reach.

Liberalizing of the mass media became an evident outcome of democratization of social life. Due to political struggles and requirements of European media legislature the liberalization of radio and television was postponed. The Radio and Television Act outlined the prerequisites of transforming the state-owned electronic media into public bodies. It also established the principles of licensing of radio and television stations. A public space for liberalization of media product consumption was opened.

The mass media market outlined the economic priorities of the media industry, which in turn maintained the process of privatization at local, national and international levels. The electronic media ownership developed in three categories; state, private and public. The local private radio stations and broadcast and cable TV operators entered the market competition with the state-owned channels. A private, foreign TV operator, Rupert Murdoch, on a nationwide scale was licensed. Advertising became a prior economic factor for mass media sustenance and development.

Demassification and segmentation of the publics catalyzed the search for competitive

information sources. Trends in offering specialized, targeted media could be observed in the private electronic media, especially in private radio. Audience migration from state-owned radio and television testify to the ebbing significance of the government-controlled media.

Diversification of content and format was an important trend of the innovative changes in journalistic standards, forms and styles. A new media culture both in terms of production and consumption was established after the departure from the old patterns.

The growing roles of the electronic mass media in the period of transition have changed the status, rights and responsibilities of the media professionals. Radio and television stay among the powers, which sensitize the nascent civil society to the challenges of sustainable democratic development.

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**I. This also prompted the creation of the Free Speech Forum (December 1995) which functions as a professional association in defense of the freedom of information.**

**II. Representative sociological survey carried out by the National Center for Public Opinion Studies (1994) in 240 census areas among some 1200 respondents. The method of a self-administered questionnaire on the uses of the mass media in Bulgaria was applied.**

**\* MBMD, January 13-14, 1997**

**\* Including repeated program telecasts.**

TABLE 1. DYNAMICS OF RADIO PROGRAMS IN BULGARIA

<b>PROGRAM CATEGORIES</b>	<b>1988</b>	<b>1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>
Total	46,810	48,498	48,718	47,946	52,833
State	46,810	48,498	48,718	47,946	49,539
Private	-	-	-	-	3,294
Information	19,090	26,154	24,167	24,348	24,440
Education	1,041	1,039	1,444	1,266	1,818
Culture	2,674	2,314	2,275	3,585	3,884
Religion	-	-	-	-	28
Commercials	1,020	923	891	1,078	1,268
Entertainment	22,531	17,585	16,869	16,236	19,376
Others	454	483	3,072	1,433	2,019

<b>PROGRAM CATEGORIES</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>
Total	161,278	237,483	284,627	302,517	314,773
State	55,579	68,974	43,230	70,688	276,998
Private	105,699	168,509	221,397	231,829	37,775
Information	53,817	72,358	83,739	85,496	85,062
Education	3,194	2,857	3,195	2,450	2,482
Culture	5,931	9,391	8,226	8,471	8,294
Religion	486	459	795	315	425
Commercials	7,004	12,490	13,000	20,541	19,154
Entertainment	82,417	120,109	148,253	150,578	180,536
Others	8,429	19,819	27,419	34,666	18,821

TABLE 2. ANSWERS TO THE QUESTION 'WHICH RADIO STATION DID YOU USE FOR YOUR ORIENTATION IN THE SITUATION THESE LAST DAYS?' (IN PERCENTAGE FOR THE RESPONDENTS FROM SOFIA)\*

Darrik Radio	55.5
Bulgarian National Radio (Horizont)	24.7
Radio Express	4.8
Radio Tangra	2.7
Radio 99	2.4
Radio FM+	2.2
Bulgarian National Radio (Christo Botev)	1.5
Radio VOA (Vitosha)	1.2
Did not listen to any radio station	12.3

\* MBMD, January 13-14, 1997

TABLE 3. DYNAMICS OF TELEVISION PROGRAMS IN BULGARIA

<b>Program categories</b>	<b>1988</b>	<b>1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>
Total	5,886	6,385	6,248	5,998	6,933	6,506	7,178	8,032
I Channel	4,050	4,157	4,246	4,167	4,457	3,748	4,394	4,962
II Channel	1,868	2,228	2,002	1,831	2,476	2,758	2,784	3,070
Domestic	3,220	3,601	3,356	3,537	3,743	3,203	3,902	5,345
Imported	1,540	1,517	2,010	1,785	2,360	2,715	2,618	2,687
Re-runs	1,190	1,267	882	676	830	588	658	124
Informa- tional	869	997	1,396	1,419	1,771	1,852	1,168	1,506
Educational	244	279	211	197	319	86	85	40
Cultural	297	233	116	140	229	109	253	104
Religious	-	-	-	-	21	18	31	21
Commercial	34	34	18	44	73	144	159	304
Entertaining	2,699	2,769	2,864	2,446	2,965	3,050	3,463	3,670
Children's	839	786	665	613	702	644	807	426
Others	904	1,287	978	1,139	853	603	1,212	1,961

**TABLE 4: PERCENTAGE OF DOMESTIC AND IMPORTED TV PROGRAMS  
TELECAST BY THE NATIONAL TV CHANNELS\***

<b>Origin of TV programs</b>	<b>Channel One</b>	<b>Ephir Two</b>
Domestic	70,3	56,6
Foreign	29,7	43,4
Total	100,0	100,0

\* Including repeated program telecasts.

# Advertising in Bulgaria - On the Edge of Optimism

## From the Typewriter to the Net

BY **KAMEN KAMENOV**

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**I**n the short time span of eight years, advertising in Bulgaria moved from reliance on the typewriter to the use of high-speed computers and the Internet for creating high impact communications.

Prevailing economic conditions during this time period caused most advertising agencies to have a severe case of "indigestion". The road traveled was extremely bumpy as one agency after another stood in awe of the "plunge". It was not the natural slow down or temporary drop experienced in most business cycles. Rather, the market for goods and services just fell

apart in less than half a year and advertising was the first to suffer because advertisers considered advertising a "variable" expenditure.

1997 is almost a "missing year" from contemporary Bulgarian advertising history. It was not a western type crisis or the expected recession following a period of economic expansion. It was sheer catastrophe.

Not many believed advertising could recover from the fall. To be sure it has yet to do so, but there are signs the road ahead is becoming ever more promising. (fig. 1).

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### **The advertisers' natural selection**

**M**any major advertisers in 1992/93 are not in the market today, especially local ones who in some cases were outspending international advertisers. In 1996 more than 10 banks went bankrupt, many of whom invested significantly in marketing communications. The list includes the 'flagship' of financial advertisers in Bulgaria, First Private Bank. Privatization funds from the 1995-96 campaign, some insurance companies, the so called financial pyramids, a private Bulgarian airline as well as importers of baked goods and candies were national advertisers actively present in media with national coverage. Some of them were engaged with ambitious advertising schedules in magazines like Business Week and Global Finance. Today they are just part of history.

International advertisers who invested heavily and successfully built brands like Hollywood chewing gum, Assoss International (cigarettes), Amoco, Rover, Dutch Lady (dairy products) have also pulled out of the market for one reason or the other. While they have been replaced by others, the exit adversely

affected the advertising market because companies like Shell, Phillips, Sony, Kodak are not even among the 50 top TV advertisers. This means these advertisers have invested less than 70,000 USD in this media, if at all.

In the current and more mature, disciplined market it seems advertising budgets are being kept tighter. The phenomenon of enormous media budgets to support the entry of a product or service is fading away.

### **The agency business - elevation from zero**

**T**he agency business blossomed in the period between 1992 - 94 when most world wide agencies opened offices in Bulgaria or contracted with Bulgarian agencies on an "affiliate" basis. This surge was backed by the entry into the market of major international advertisers. Procter & Gamble with many of its brands, Coca Cola, Camel, Marlboro, Gillette, Colgate-Palmolive, Ford, Kodak, Wrigley, Kraft Jacobs Suchard, Shell, Danone, just to name few, were the first to encourage other world wide agencies to think about advancing their clients products and services in the

Bulgarian market as well.

The three factors for encouraging the existence of contemporary advertising - mass media, mass appeal products, and most importantly, a critical mass of potential consumers - were present. The newly born private media, mainly print and radio, were eager to capture advertising dollars that business was making available in its attempt to capitalize on an emerging free market.

The lack of strict regulations and an enthusiastic consumer served to make the most of the circumstances. The latter appreciated these efforts, and according to an international Gallup research from this period, 73% of consumers believed in what advertising was offering them. (Media and Advertising, September 1999) There was also a boom in TV advertising placed mostly in prime time due to its initial attractive pricing. Up to 10 minutes of solid advertising (sometimes even more) was the 'commercial break' norm for the time. No wonder the advertising business skyrocketed from the outset. (Up to that time there was only one state owned agency that today is not engaged in media advertising, having chosen to specialize in organizing exhibitions.)

The media proliferation - from satisfying the consumer to cost effectiveness for the advertiser

The period 1990 - 1995 can be characterized as time of spontaneous and irrepressible enthusiasm for Bulgarian media. After the liberation of the media market the consumer showed an insatiable thirst for information. "In this period in Bulgaria were born more than 1000 newspapers and magazines. Hundreds of them did not cope with the new reality and at the end of 1995 only about 500 newspapers and 300 magazines were still present on the media scene." (Nikolov, 1996: p. 35) The ups and downs of the publishing business were determined by advertising. The publishers had to face the new market reality - a publication could survive only in symbiosis with advertising. In other words, the value they could offer an advertiser resided in their ability to impact a well-defined audience which in practice defined the publication's reason for being.

At the beginning most advertisers tended to be persuaded to select one publication over another on the basis of higher circulation. The wiser ones sought to select media which could reach tightly defined target markets, thus avoiding

waste circulation while achieving a high degree of cost effectiveness. "If the 60's was the decade of mass marketing, the 70's the time for segmentation, the 80's the time of micro-marketing, the 90's was the age of marketing whose object was the individual." (Peters, 1999: 77) Agencies were not interested only in the cost per thousand but in the cost per target rating point. This led to the profiling of various media options, each trying to capture its specific audience and offer it to a business.

This focus is highly visible on the radio scene. The first private local radio station "FM+" started airing in the autumn of 1992. It was soon followed by tens of others. Each demonstrated how it could survive on its own with just advertising support. Today there are all kinds of radio formats, each wooing its own specific audience for which advertisers are eager to pay.

The same scenario pertained to the first private local TV - Nova Televizia (started in the summer of 1994). The interesting thing about newly born electronic vehicles is that - in contrast to print media - all have survived to date. The reason: they are coping better with the new market realities and are on better terms with

the advertising business. "I am most impressed by the success of the private radio stations and the development of the radio advertising - it seems like this media type is closest to approaching world standards." (Doganov, 1999: p.12)

## **The Advertising Market**

### **Today - Quality Orientation**

**T**he quality orientation of today's advertising agencies is at the heart of the business growth realized over the past few years. Successful advertising is no longer simply keeping a brand name in front of the public in an acceptably creative way. The demand for effectiveness has brought to the surface a commitment to a higher order of professionalism in communication. Pure client ambition and creativity for its own sake are no longer sufficient for winning marketplace acceptance for a product or service. Advertisers, especially the major ones, are demanding research based strategic thinking and disciplined creativity based on research findings.

It's apparent the international business community is imposing its high communication standards on a local basis. This has led to an intense demand for high quality, expe-

rienced people on the agency and client sides of the marketing equation, i.e. marketing directors to establish short and long term objectives; brand managers and assistants to execute those strategies.

Almost every week there are job announcements in the press seeking broadly experienced professionals. Last month a major international agency placed a job announcement for four positions - a copywriter, a creative director, a media planner, and a production manager. Having in mind the scale of the local advertising business this sounded almost like an offer for buying a medium size agency. Four job positions were announced in the press by one of the largest Bulgarian agencies. A world wide agency was looking for a media director. In most cases, two to three years experience in the field is a must. This suggests organizations are time pressed and unable to invest in educating newly acquired inexperienced staff.

In brief, while advertising agency structures may have been determined, there is a pressing need to hire experienced specialists to make them functionally capable. Changing hats of responsibility within a

given agency is no longer in fashion as it was five years ago.

### **The media scene**

**T**elevision is the media capturing most of the advertising expenditures in the marketing efforts of advertisers. Leadership in this regard belongs to Channel 1. (fig. 2) In second place is the private "Nova TV" with a little less than half the advertising volume, but it is 'local' to Sofia. Thus, it can be thought of as an outstanding success when considering the national coverage of Channel 1. The remaining TV outlets are local cable which are doing quite well from business point of view, given the entry fees collected from their subscribers. Obviously there is a place for a private national TV which in all likelihood will dramatically change the competitive environment after the licensing of the first one. A recent competition for licensing was won by a foreign investor - Rupert Murdoch whose TV channel is expected to begin airing by the end of 2000.

### **Television - good for image, good for sales**

**T**he advertising market today is shaped mainly by

international advertisers, which have a dominant marketplace presence, especially on TV. As shown in the chart presenting the top 20 advertisers (fig. 3) there is only one Bulgarian - Mobiltel, the GSM operator (No. 10). Although some advertisers like Interbrew, Brewinvest, Kraft Jacobs Suchard, Nestle, Danone, are advertising purely Bulgarian brands they are really foreign investors setting budgets on the basis of their international experience.

The picture is not the same in all media (fig. 4). In print for example there is a relative balance between local and international advertisers, and in some cases the first outspending the latter. The first two - Mobiltel and Mobikom each, are outspending the third Daewoo Motors by 2 to 1.

One reason is purely financial; the lower absolute price of print and radio compared to TV. Another reason is associated with marketing realities. The market in general has been shaped by major competitors who now are turning to 'competitive' rather than introductory advertising. For this reason there is greater need for higher frequency of communication than penetration (which TV offers with its significantly greater potential

audience).

Another reason for TV's preference to print media has to do with the nature of the product being advertised and advertising effectiveness. Looking at the list of the top 20 advertisers on TV, 19 are brands of fast moving consumer goods or the so called low risk products. The exception is Allianz Bulgaria (insurance).

One may argue that these are mass products and TV delivers a considerably broader based audience which presents a significant waste in case of smaller markets. But electronic media provides possibilities for close and narrow targeting on the basis of special programming. Brand image building and appeal to the emotions tend to be more easily effected with TV. Advertising of high risk products require more and longer 'reasoning why' for which print media is better suited.

### **Press - preferred for sales promotion**

**T**he allocation of advertising expenditures tends to be based on the type of marketing communication activity. Media research does not take into account the differences between advertising and sales

promotion as different marketing communication tools. The reported figures are for both, but a large portion (especially in print) relate to pure sales promotion incentives. The consumer does not make any distinction between the two. The question of which media to use invariably comes down to money. Ad production for print media is considerably less than for TV. An advertiser is not likely to change TV spots offering a variety of sales incentives every month with the high cost of production while with print it is possible.

Once again, it's apparent advertisers prefer the press as a communication vehicle believing it to be more effective when it comes to sending sales promotion messages, especially when they contain coupons. It would be a mistake to consider print media a purely sales promotion tool. There are many image campaign in press especially in magazines where advertisers take advantage of superior printing quality to make a "quality" statement for its product or service.

### **Radio and outdoor**

#### **are helpful**

**R**adio and outdoor are utilized mainly as supple-

mentary media. These options are rarely used as advertising campaigns in and of themselves. When used they are usually for a small advertiser and are local in character.

The radio scene is interesting with the dominant reach of the state-owned program "Horizont" - 52.27%. (fig. 5) National private radio still has not appeared on the market but the relatively low reach of the local private stations cannot be explained solely by the limited geographical coverage. The problem is to a large extent purely technical. The radio sets owned by older people and especially in smaller residential areas cannot be tuned to the FM frequencies on which the new private radio stations are airing.

There is no hard data about the advertising expenditures in radio but most probably the private stations are capturing more advertising money in this media because of the well profiled and higher income audiences they offer.

### **Advertising production -**

#### **local vs global**

**M**ost TV commercials are not produced in Bulgaria. One of the reasons - the economies of scale

achieved by advertisers using one and the same spot in several countries. But this is a rather mechanical explanation, because production costs in Bulgaria are attractively low (10 000 - 40 000 DM). Given the gross budgets of most international advertisers, Bulgarian production would be easily affordable. Apparently money is not the only concern. Some leading advertisers have commissioned tailor made spots for the Bulgarian market but produced them abroad. (Interbrew with the beer brands Astika and Kamenitza, Brewinvest with the beer brand Zagorka, KJS with Svoje chocolate, Bulgarian United Bank - all of them local brands.) There appears to be a deep-seated concern about local production quality. Yet, there are very good examples of spots produced in the country which meet or exceed the standards of their international rivals.

So, even when advertisers believe that the presentation of their message is more important than what they are saying, there are local production facilities capable of meeting this perceived need. There are of course the happy exceptions. Major advertisers like Procter & Gamble, Danone, Nestle etc. are locally producing some of their spots for

their Bulgarian as well as worldwide brands. This does not necessarily mean they believe the Bulgarian consumer is significantly different from its global confreres, though he or she has specific characteristics and market behavior indigenous to the country. As elsewhere "the housewives are not seeking status or identity when they opt for the brand name; they are minimizing risk to their families." (Schudson, 1990: p. 52)

This reality tends to demonstrate international advertisers are open-minded in the constant search for resources to optimize communication effectiveness for its brands at the local level. The assumption "It works everywhere else, why shouldn't it work in Bulgaria?" may be right in most cases. The 'real' question is, "but can it work better with a local touch?". If the answer is "yes", it becomes the responsibility of the advertising industry to stand behind this idea proving that it can significantly enhance the market performance of a given brand with local distribution.

Some advertisers prefer to be on the safe side from a managerial point of view, accepting "already produced" spots. For identical markets this is 100%

acceptable. The real question to be answered is, "how identical is the Bulgarian market (consumer) when compared to the country for which the commercial was originally intended.?"

Many times advertising tries to seduce the target market with images, lifestyles and personalities which he or she cannot identify with. It's rather doubtful a Bulgarian housewife sees herself with detergent in hand, having nothing to care about but the whiteness of her husband's shirt.

As Calkins puts it speaking about the press (but then in the forties there was no TV as yet) "These humbler adjuncts to literature may prove more valuable to the future historian than the editorial contents (of the magazines). In them we may trace our sociological history ...changing interests and tastes, in foods, clothes, amusements and vices, a panorama of life as it was lived, more informing than old diaries or crumbling stones." (Mayer, 1991: p. 30) From this point of view the future historian will draw quite distorted conclusions about the Bulgarian consumer and the way he/she lived in the nineties. The picture is quite different in other media, espe-

cially when the creative concept and its production are local. This does not necessarily mean it is better. In many cases the ads may seem disconnected, difficult to decode, touchingly naïve. But it must be remembered that to a large extent they are a reflection of the overall market and its level of sophistication. As the consumer grows in sophistication with respect to a purchase decision, so will the advertising. The advertising industry and international agencies in particular have the wherewithal to exercise leadership in improving creativity and production in print rather than wait for the market to force changes to meet consumer demand for higher standards.

Some agencies are already creating memorable and effective radio spots and print ads. Most of them come from the international agencies who obviously are adapting themselves fast and effectively to local specifics. The major Bulgarian agencies are closely following suit and in some cases even outworking them.

### **What's in for the Future**

**A**dvertising has no choice but to improve its output and effectiveness with the

quantitative development and qualitative sophistication of the market. It has to live up more closely to market realities trying to better understand them and even be one step ahead of them. The signs in this direction are positive.

Today, there are many universities in which advertising is being studied under one form or the other. Advertising is becoming recognized as a profession. More and more it is being perceived as a business with its own characteristics and rules whose survival depends on the disciplined creativity and business sense of its practitioners.

What's more, many agencies and advertisers today are eagerly turning toward field research to build and support marketing communication programs. This in turn has precipitated the growth of sophisticated research resources for the pre-testing of concepts, ads and commercials as well as reaching a deeper understanding of consumer attitudes, beliefs and purchase/use habits.

In all likelihood, advertising expenditures for the year 2000 will be at record levels. For the first three months TV spending in Bulgaria is up almost 90% versus 1999. (fig. 6) Most interesting is the fact that

growth has come from old participants in the market and not from new entrants. This suggests that forward thinking, enlightened management believes in the power of advertising and marketers are willing to invest in its power for establishing brand identities and driving future sales.

Recognizing that 'tradition' suggests the first three months of the year yield the weakest quarterly advertising revenues, the best is yet to come. With the privatization program in progress one can expect new market entrants to enhance advertising expenditures as the competition grows for consumer attention. The challenge ahead for advertising, as it always has been, is to keep the marketplace energized and the consumer sufficiently curious so that a positive purchase decision is made in favor of a specific client's product.

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**FIG. 1 - TOTAL TV ADVERTISING BUDGET BY YEARS**

1993	30,000
1994	48,000
1995	58,000
1996	42,000
1997	22,000
1998	42,000
1999	52,000

**FIG 2 - CHANNEL SHARE - 1999**

Bulgarian National TV	66.23
Private Air TV	10.39
Cable TV	19.24
Satellite	4.14

FIG. 3 - TOP 20 ADVERTISERS - 1999 BUDGET (DEM)

1	PROCTER & GAMBLE	8,445,261
2	INTER BREW	3,923,046
3	BREWINVEST	3,040,646
4	COCA COLA COMPANY	2,401,976
5	KRAFT JACOBS SUCHARD	2,321,564
6	UNILEVER	2,064,903
7	WRIGLEY'S	1,723,816
8	NIVEA /BEIERSDORF/	1,274,874
9	NESTLE	1,119,760
10	MOBIL TEL	979,972
11	JOHNSON & JOHNSON	797,441
12	MOBIKOM	764,911
13	ALLIANZ AG /insurance company/	697,637
14	BELANA	684,927
15	ELITE COFFE	646,673
16	SMITHKLINE BEECHAM	591,925
17	DELTA	473,361
18	FORMULA 101	454,971
19	CHIPITA	446,383
20	COLGATE - PALMOLIVE	427,321
	TOTAL	65,801,280
1	MOBIL TEL	2,238,242
2	MOBIKOM	1,900,683
3	DAEWOO MOTOR	854,918
4	RISK ELECTRONICS	781,475
5	KRAFT JACOBS SUCHARD	768,004
6	FIRST INVESTMENT BANK	574,271
7	PROSOFT	525,865
8	NESTLE	504,969
9	SONY	421,108
10	BULGARTABAC - SOFIA PLC	383,527
11	DANONE	382,547
12	INDEX BULGARIA	368,112
13	FORMULA 101	341,876
14	BREWINVEST	318,108
15	BULGARTABAC - BLAGOEVGRAD PLC.	311,728
16	SOFIA FRANCE AUTO	309,075
17	ROSEKSIMBANK PLC.	279,045
18	NAYVA INTERTRADE BUSINESS CO	277,154
19	COCA COLA COMPANY	268,106
20	ART SYSTEM BULGARIA /computers/	262,389
	TOTAL PRINT	40,754,626

FIG. 4 - AVERAGE MONTHLY REACH, 1999

Horizont	52.27
Darik	11.37
Hr.Botev	10.6
Veselina	7.79
Expres	6.58
FM+	6.32
Kanal Kom	5.4
Radio+	5.39
Atlantik	4.25
Viva	3.31

	Jan'99	Feb'99	Mar'99	Jan'00	Feb'00	Mar'00
CHANNEL1	890,940	1,581,025	2,111,225	1,405,525	1,380,325	385,980
EFIR2	69,870	48,800	36,750	87,225	109,875	87,450
NOVA TV	310,908	569,931	687,990	911,135	1,452,566	1,829,941
7 DAYS TV	118,976	193,933	286,590	132,342	123,326	160,615
TOTAL	1,390,694	2,393,689	3,122,555	2,536,227	3,066,092	5,937,806
	2,536,227	3,066,092	6,906,938			11,540,125
			5,937,806			

Source: BBSS Gallup

## A Brief Look at the digital changes in the media Field and the Development of the Web Pages in Bulgaria

BY **TEODORA PETROVA**

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### The technological step forward and access to information

The development of the new information technologies has made us accustomed in the last years to constant increase of information processing, transmitting and storage of different type of information. One of the results was "democratization" of personal computing and universal use of information. Technological change led as well as to a multiplication of the networks enabling access to new products and services.

The communication policy-making is acknowledged that the development of access by the public to the new communications and information services will be driven by the main players in the field: public authorities, the industry- infrastructure, service providers and the consumers.

Ways of accessing and dissemination of information in the midst of global information and communication revolution changed fundamentally.

Enforcing the characteristics

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of a global media Internet was even called "the new mass media", but the "net" has much broader characteristics than that. The processing of information through Internet has strong implication on institutions, individuals, commerce and journalism. The Internet does not mean the end of traditional journalism. The information technologies enforce some of the most visible characteristics of media in on-line journalism.

The Internet provides everyone through a PC a global access to a friendly e-mail, your bank account, newspapers radio and TV stations and thousands of information sources from all over the world. The Internet structure is decentralized. It allows millions of users to access and disseminate millions of information sources. The use of information sources is interactive and user controlled.

The aim of this article is:

- To give the landscape of the IT market and the stage of access to new informa-

tion technology services;

- To outline the use of the new information technologies in media;
- To stress on some of the characteristics of the emerging new media;
- To look at process of media convergence in Bulgaria;
- To give a brief presentation of the tendencies of development and most used Web sites of the electronic issues of Bulgarian media.

### **Infrastructure of the IT market**

According to IDG the income from the sales of IT in Bulgaria for 1999 was \$153mln. 109,1 mln. \$ are in the share, of hardware, 20,7 mln. \$ are in the share of software 23,1mln. \$ are in the share of services. (Computer world, 15.04-21.04.2000). The tendencies in the market according to the issue are:

1. The market is in the phase of reconstruction.
2. The whole growth of the income is slow because of the falling down of the sales of hardware.
3. The main incomes are in the shares of software and hardware.

**4. The development of the big projects in Bulgaria influence the investment in IT sector.**

Different sources give in the last 2-3 years the numbers of users about 3-6%. Every year their number of Internet users is steadily growing.

The number of PCs in the country is estimated about 350 thousand. Most of them are in the offices and educational institutions. (Data from the Ministry of Transport and Telecommunication from Bulgaria).

The sales in the market for 1999 of the IT firms are : others - 60%, HP - 11%, IBM - 9%, ExCo - 7%, and Pro Soft - 6%. High speed Internet connection exists in Bulgaria from 1994 and the Internet provider is GUKIS. The number of Internet providers in the country is 150. (Official data - 1999). Some of the biggest providers are: GUKIS, Orbitel, Dygsys, Techno-link. By law the monopoly on terrestrial and satellite communications up

to 2003 are exclusive right of Committee of Posts and Telecommunication now Ministry of Transport and Communication. ISDN digital line is getting slowly in use in the last 2 years. 8. 34% of the main central telephone lines are digitalized. Over 300 mln. \$ were invested on technological level in the national telecommunication structure in the country in the last 5 years. (Data from the Ministry of Transport and Telecommunication from Bulgaria).

A great number of Internet centers and Internet - coffees opened in most of the towns in the country. They are very popular especially among the young people. Most of Bulgarian schools and all the University centers have access to information technologies all though the PC in the PC Centers are old. A special new law frame on IT and Development of Information Society is settled by the adopted by the Parliament Program for Development of Information Society and High-tech Draft Law. There is National Coordination

Council for development of Information Society in Bulgaria. There is no specialized regulatory body. A lot of independent associations with representatives from the business and the sector are formed. They stick to the vision that sector should be self- and co-regulated. The market of IT products is liberated.

### Regulatory Frames

The policy governing body in the field of telecommunication sector is the Ministry of Transport and Telecommunications. The re-regulatory body is State Commission of telecommunications. National Council adopted telecommunication Law in 1998. R and TV Law (1998) regulate electronic media and the regulating body is the National Council of R and TV.

The Copyright and Neighboring rights Law was changed and adopted to European Law due to the questions which emerged in respect to and the rights of the reproduction in a digital environment, storage of

works in electronic memories and use and reproduction and transmission of those works via new information technologies. The last changes of the Copyright and Neighboring Rights Law were published in the State Newspaper on 07.04.2000. They entered into force on 08.05.2000. The changes were in the light of WIPO (World Intellectual Property Organization), The WIPO Performances and Phonograms Treaty (WPPT) and other Internet-related copyright issues.

In Bulgaria as in European communication policy making there are two views in concern of the regulation of R and TV programs transmitted via new information technologies:

1. It is of public interest operators to have some regulation as to declare the sources of information and respect democratic values and human rights, dissemination of illegal information, defamation and intrusion of privacy. All regulatory mechanism should be introduced in respect of freedom of expression.

2. There is no need of wide range regulation in the field. The regulatory bodies should have rights and instruments of regulation only when the rights and interests of users are threatened. The regulation process should include on self-regulation and co-regulation.

### **Convergence in the sector**

**I**n the IT field, the convergence in Bulgaria at the start level. There is some use of Internet services, mobile net services and some rare examples in cable networks service. According to the regulation the cable operators in the country may offer Internet services. Because of the bad technical level of the most of the cable networks these services are not yet offered to the Internet users. Due to regulatory monopoly of the State Telecom, the low speed of Internet connections through analogue telephone lines and the bad condition of the services offered by analogue telephone end points R and TV programs are not transmitted via new information technologies. There are no

transmissions of digital broadcasted R and TV programs but some long-term technical projects already started in that field. The digitalization in the R and TV reached a certain state in radio and TV program production process.

There is strong penetration in the country of cable network television. Most cable networks are still getting their networks to the requirements of the technical standards.

Cable networks offer 30 - 50 satellite and terrestrial regional, national and world TV programs. State Satellite channel Bulgaria is transmitted via satellite. National Council for R and TV approves and State Commission of Telecommunication from Bulgaria issues licenses for transmission of R and TV programs via satellite and cable. From a year on e-commerce is experimentally introduced in the net.

### **Bulgarian media web pages**

**T**he analyses of the Bulgarian media on-line

issues will follow:

1. The pattern of the principles media web pages:

\* The information and ways of accessing it should be easy to manage with.

\* Autonomy- of the information structure, visible and invisible logical structure on the screen.

\* Easy to use well-structured design.

2. Content analyses of the web site and the newspaper issue.

Parallel content analyses of the daily issues of the choice and structuring of the top news and the information.

### **Characteristics of the media web pages**

Few very popular sites, such as AOL/Netscape, Microsoft Network and Yahoo, dominate the web in general. According to Nielson, around two-thirds of the web "audience" is accounted for by the top ten sites. The dominance of the portal sites like most of those may effectively restrict access to the medi-

um for both users and producers on the Internet.

/Gary Herman, Information Society Forum, 17 September 1999, Lisbon/

Internet is predominantly Anglophone, US based medium with about 100 million potential users. It is a global medium in reach not by share. There are about 6000 mother-tongue languages. In the Anglophone predominated Medium the share of the electronic media issues in different languages is relatively very small what is the case of Bulgarian issues of newspapers, R and TV web-sites. They have their share of audience in their national markets, but they are of global reach and could be accessed any where in the world.

The media web sites are getting more and more popular. Most of them started in 1995 and 1996. Big newspapers have their web site and on-line issues. The most circulated newspapers "Trud" and "24 chasa" /over 240 thousand/ have no web sites. It was considered by their owner the German

group WAZ, they may lose audience having on-line issues. WAZ has national editorial satellite connection with all regional issues

Topic in the newspaper	Topic in the online issue
Bulgaria	Politics
World	Business
Goods and money	Analyzes
Personal opinion	Comments
Ext.	Ext.

- Varna, Burgas, Stara Zagora and Plovdiv/. The regional issues and the regional advertisements are sent daily to Sofia where the issues are published. The editorial rooms of both newspapers and all issues owned by WAZ are best well equipped and use new information technologies in their information processing and lay-out.

According to the ratings most popular web sites are of newspapers Capital (weekly newspaper) and Monitor (daily newspaper). Others newspapers with popular on-line issues on the web are: Pari, Sega, Standart, Democracia and Banker. The sport on-line issues are: Sport, Toto, Meridian mach, 7dni sport, Evrofutbol, PFL, Sport-Bulnet, Klub-F1.

## Capital

<http://www.capital.bg>

Weekly newspaper. On-line issue <http://www.capital.bg>. The newspaper includes political and economical analyzes, well situated in the media and advertising market. On the on-line issue the analyzes are kept in. The on-line and paper issues look very much alike. In the on-line issue the most of the pictures are not included except the one from the first page of the newspaper. On the first page of the on-line issue there are hyperlinks similar to the main sections of the newspaper: politics, economy, society, analyzes, comments, but they are structured differently. This is one of the first and permanent on-line issues on the market. The access to information is easy and quick. It is also very popular for labor ads. published and restored in the on-line issue. One of the best and very often visited sites.

## Monitor

<http://www.zone168.com>

Daily newspaper. The on-line issue started in 1999 by

Press group Monitor- owner of the newspaper. The concept was worked out years before its access on the web. At the beginning the on-line issue was put on the web together with the print of the newspaper. Now the on-line issue is on the web in the morning. Free registration required. The content of the information is nearly the same in the newspaper and the on-line issue. The structure the topics and the hyperlinks differ. For example:

There are tree popular topics in the on-line issue- Comment, Archive and Inquiry. In the Inquiry there are 2-3 questions on the hot-line topics. The answers are "yes" and "no". Comment is similar to the Letters in the newspaper. Very easy and well estimated is the function Search. With a key-word there is an access to the materials on the topic in the issue. The hyperlinks are on the left side of the screen. On the right - the short presentation of the news. The graphic design of the newspaper and the on-line issue also differs. One of the most visited web sites which is at

the head places of the ratings of the web sites.

### **Standart**

*<http://www.stadartnews.com>*

Daily newspaper. On line issue- <http://www.stadartnews.com>. The content, the topics and the headlines of both issues are nearly the same. In the on-line issue the hyperlinks are on the left. The topics and the resumed materials from the front page- in the middle and the editorial- on the right. The graphic design is similar. Search function by key-word helps the user. The web site is easy to manage with. Under the materials there are E-mail addresses of the authors. The authors say that the estimate the e-mails from the audience very much.

### **Sega**

*<http://www.skycode.com/se gadaily>*

Daily newspaper. The on-line issue covers the content of the newspaper issue. The topics with short presentations are structured on the front page: Bulgaria, Economics, Abroad,

Culture, others. Most of the pictures and graphics from the paper issues are not included.

### **Democracia**

*<http://www.dir.bg>*

Daily newspaper. On line issue <http://www.dir.bg> Issue of the Union of Democratic Forces. The content of the on- line issue covers the topic of the newspaper. The front page is structured simple for use. The headlines and short presentation of the text is presented there without photographs and graphics.

### **Pari / Money**

*<http://news.pari.bg>*

Daily Economical Newspaper. Online issue in Bulgarian and English - paid access. Started in 1995-1996. The on- line is orientated towards the business audience. On the front page the topics are structured on linear hyperlinks.

### **Banker**

*<http://www.banker.bg>*

Economical newspaper. It uses a web site to be presented on. Resumed chosen

materials are presented on the web.

### **Egoist**

*<http://www.egoist.bg>*

Monthly magazine, It is designed towards the young audience and it is very popular among the young audience. Modern design and photography. The interface includes 3D animation.

The materials are presented in brief with the help of multimedia. The on- line issue is interactive and the editorials receive materials from the audience. There is on- line story ,opened for discussion.

During the last 4-5 years there is a burst of Internet and Information technology newspapers and magazines on the media market /IT, IT news, PC Mania, Computer world.

During the last 4-5 years there is a burst of Internet and Information technology newspapers and magazines on the media market (IT, IT news, PC Mania, Computer world, In the world of Internet, PC World, PC Week, Linux-bg, E-zone and

others).

### **Bulgarian news agency**

*http://www.bta-bg.net*

News presented in 20-30 words. Free on-line issue. Bulgarian telegraph agency has economical and political on-line issues, which are paid. They are in Bulgarian and English.

### **Balkan News agency**

*http://www.balkan.news.bg*

News bulletin. Presentation of the news for the day. The access is paid. An interview for the day is presented.

### **Bulgarian National**

#### **television**

*http://bnt.bg*

It started in 1998. Last year the graphic design was changed. The change doubled the visit of the page-400-500 per 24 hours. The information is renewed 2-3 times a day. There is a logical structure in the structure of information. The activities, the structure of the organization and the TV program are presented. The structure is not of the typical TV site as the ones

of CNN, NBC, and BBC.

### **7 dni TV**

*http://www.bol.bg*

Web site of the TV. TV program, TV shows and anchors and Internet connection with the audience. Short videoclips of the programs.

Radio Vitosha and Radio Daric have Internet transmission. Others radiostations are ready to start Internet transmissions.

### **Training in Journalism in**

### **Context of New Information**

#### **Technologies**

The functioning of the media and the use of new information and communication technologies changed the professional situation and the ways of gathering information in the field of journalism. The new information technologies influence traditional and on-line journalism in:

1. Process of writing, editing and lay-out;
2. Technological process in production of newspapers, R and TV programs;
3. Use of informational

sources, connected with Internet and new information and communication technologies;

4. New law and self-regulatory mechanisms in the media field and new information technologies.

MA of Journalism and PR is thought in the Faculty of Journalism and mass communication- Sofia University. During the training courses in Journalism and PR students are trained and work new information technologies. New Bulgarian University also offers courses in Communication where students are thought in the use of IT. Specialized courses are thought in Free Universities in Varna and Burgas. There are specializations in Journalism and Mass media.

### Conclusions

The technological development and the use of the new communication technologies has an increasing impact in Bulgaria on traditional press, R and TV in two ways- process of digitalization of traditional

press, R and TV and new services and issues offered by the use of the new medium Internet. There is fast growth in individual telecommunication services- voice, image and data transmission in the last two years and especially by the services offered by GSM operator M-Tel Trading Ltd.

The existing national and international media regulatory frameworks are mostly based on a concept of clear distinction between the various types of media as press and electronic media. Bulgarian national legislation is currently changing and adapting to changes on technological and telecommunication development.

Digitalized transmission of R and TV programs via cable and satellite removes the restraints connected with legislation and content programming to large extent. New questions /editorial responsibility, civil and criminal liability/ arise in connection with protection of content /copyright, right of right holders/ in dissemination of information and transmission of R and TV programs via new

information technologies. Law and self-regulatory bodies try to settle some of these questions / Film author, Music author, BSA and others/.

The development of the market in the field of new technologies and telecommunications is slow but it is growing. The advertising market in Bulgaria has no significant movement towards media transmitted via new telecommunication services. There are few examples towards that move. Raiffeisen bank is offering services through dir.bg -most visited Bulgarian web site (September 1999).

The existence of national web sites in the original language helps the audience of a certain country in the case the audience of Bulgarian population living in and out of the country to have access to the services offered by the new information technologies and to keep cultural and language identification of the country.

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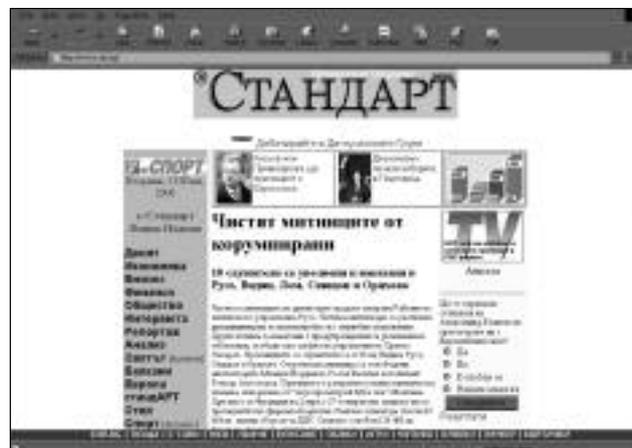


M O N I T O R



S T A N D A R T





## The Media - the Possible, yet Unrealized Anti Corruption Instrument

BY VESSELA TABAKOVA

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**I**n Bulgaria of the mid nineties prerequisites emerged for growth of the corruption practices. Among those prerequisites we should mention, as especially “contributing” to corruption, the delay in the reforms, the financial and economic chaos, the deterioration of law and order, the morality and value crisis. The privatization turned out to be accompanied by spreading requette and clientelism. The mass consciousness started to perceive the privatization itself as a swindle.

The processes in effect deepened the resignation and cynicism among a considerable number of Bulgarians. A dual attitude towards the corruption practices settled on a

mass level. The vast majority of Bulgarians consider corruption as one of the most serious and threatening problems of society, a great social wrong. At the same time, however, a considerable part of people, mostly due to pressing facts of life, greatly soften their intolerance and condemn towards corruption, perceiving it as “a necessary evil” that can help in solving some personal problems. On a mass level corruption was considered impossible to eliminate or punish.

The changes at the beginning of 1997 naturally gave rise to hopes for an offensive towards corrup-

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tion, for transparency of the privatization processes as well as for effective operation of the legal system. The struggle against corruption was also considered a major precondition for improving the investment climate - as many international analyses show, corruption in Bulgaria is among the factors that rebuff the potential investors. (See Corruption as a Problem of the Transition to Sustainable Market Structure - CSD Monitor, 1998).

The political will expressed for fighting corruption brought up positive public expectations, even more so, taking into consideration that those are transferred to the process of Bulgaria joining the EC - the actual progress in fighting corruption is a major political condition for Bulgaria in order to join the EC. The positive expectations are further fueled by the OCTOPUS II program started by the European Committee and the European Council as an ambitious program for increasing the efficiency of the fight against organized crime and corruption in the Central and East European countries. (See Corruption and Organized Crime in States in Transition /Octopus/. Final recommendations and guidelines for action addressed to the government

of Bulgaria. Council of Europe, Strasbourg, September 24, 1998).

#### Media monitoring of corruption: aspects of methodology and method

In such a situation it is only natural that media is not only the voice of public expectations, but they can also act as a powerful tool for anti-corruption disclosures and pressure on institutions. The realization of the media effort for bringing corruption out in the open mirrors the state of development of journalism itself and its potential to act as a "fourth power" beneficial for the social processes.

The analytical tool of media monitoring can give an objective idea for the actual dimensions of the media responsibility in fighting corruption. At the same time, however, it also allows for measuring the level of development of an anti-corruption disclosure mechanism, which functions in a far more complex system of interrelations where media is a mere element.

The media monitoring of corruption on which our analysis is based concentrates around the following main objectives:

\* to present the general quan-

titative characteristics of the corruption issue presence in the central print and electronic media;

- \* to reveal the qualitative characteristics of the media reflection of corruption with priority on the manner and extent in which media analyzes the nature, the displays and types of corruption as a social attitude and phenomenon;

- \* to evaluate the media reflection of corruption from the stand of the possible influence over the formation of public attitudes and opinions;

- \* to inform about the media presence of the activities of Coalition 2000 and other anti-corruption initiatives.

In a methodological and methodical aspect, the work on media presence of the corruption issue is based upon the notion of corruption as a social relation between two sides, one of which is ready to give something in order to obtain something else from somebody who has the means to do it. The complex relation "corruption", as revealed by its multiple exhibits, is defined as an abuse of power - economic, political and administrative one - which leads to personal benefit at the expense of the rights and lawful interests of an individual, a certain community or the whole society.

Due to its nature of breaching the established "rules of the game" or existing on the basis of unsettled, yet necessary rules, corruption is a hidden (invisible) social relation and phenomenon. Therefore, the appearance of the issue in the media is of major importance, since media - by exhibiting the problem - are a possible tool in achieving anti-corruption goals.

The method of media analysis combines research techniques which are functions of the "middle level" theories, adequately operating on the levels of group, community, institution. By means of this method and on the basis of the empirical material gathered one is able to not only express the qualitative parameters of the presence of the corruption issue, but also to define and analyze the most characteristic tendencies and established interrelations and contextualizations of its media presence.

The method chosen, preconditioned by the corruption media monitoring goals, integrates the content analysis as a research technique allowing for the objective description of the visible content of the communication and the communication units and elements of discourse analysis as a research technique revealing

the attitude towards the events and processes through the manner of writing and talking about them.

The registration card, on which the print and electronic media are surveyed, constitutes of 26 indicators. The latter can be structured as follows:

\* indicators for measuring and analysis of quantitative and content media features of the corruption issue presence, such as volume, placement, authorship, type of communication unit etc.

\* indicators for measuring and analysis of the depth and peculiarities of the corruption issue media treatment, such as sphere of exhibit, type of corruptive activity, rigor, anti-corruption findings and actions etc.

\* indicators for measuring and analysis of some discourse aspects of the media reflection of the corruption issue such as key words, headlines, intonation characteristics etc.

The research approaches create the necessary empirical and analytical basis for:

\* revealing of the major peculiarities of the corruption issue media presence in a given period;

\* comparative analysis of the

characteristics and tendencies in reflecting the corruption issue at different periods;

\* defining the fields of media exposure influencing the public attitudes and opinions towards corruption.

The media survey during the past 1999 included 13 metropolitan newspapers, 9 of which were dailies /10 until March, when "Kontinent" newspaper disappeared/ and 3 weeklies, as well as certain excerpts of the electronic media broadcast.

The newspapers surveyed were "Demokratsia", "Duma", "Trud", "24 Hours", "Sega", "Standard", "Novinar", "Pari", "Monitor" and the weeklies "Kapital", "168 Hours" and "Banker". The electronic media surveyed were BNR, BNTV, Darik Radio, Nova TV and 7 Days Television.

The survey focuses on the media participation and engagement in the fight against corruption as well as on the possible influence of the media discourse about corruption on public attitudes. Due to the specifics of corruption being a hidden social relation, the media - in a way - are the basis of the "public discourse" on corruption, they strongly influence the public attitudes, the definition of the public "agenda". This, in fact, was

displayed throughout the year of survey.

### **“The media expansion” of the corruption issue**

Throughout 1999 the corruption issue “invaded” and ever increasing area in the newspapers as well as in the electronic media surveyed. For a good reason - even though this was not proven by a frequency dictionary - a headline in “Kapital” newspaper at the end of the year proclaimed corruption as “the word of 1999”. Other journalistic definitions - also private - such as “the most fashionable issue”, “the hit No. 1 issue” also clearly reflect the place of the corruption theme in media.

“The expansion” of the issue peaked during the last quarter, when 1605 texts were registered in the papers, which gives us a reason to say that the last media quarter, especially in the print media surveyed, was the quarter of corruption issue. The dynamics of the qualitative accumulation is truly revealing - 270 communication units were registered in the first quarter, 703 - in the second, while in the third one the number increased to 1149. Clearly,

during the last quarter the number of registered texts is almost 6 times larger compared to the first one.

The electronic media, due to their specifics, can not be invaded to such an extent by a single issue and, on the other hand, the summer program scheme also influences the qualitative accumulation. Nevertheless, during the last quarter, when 191 units were accounted for, the increase is more than double compared to the first quarter when 86 units were registered, /second quarter - 53, third quarter - 25/. It is worth noting, for example, that during the last quarter the corruption issue appeared 31 times in “Before all” of “Horizont” program, 13 times in “12+3” etc. Its presence in “Nedelia 150” was also considerable, the registered 17 units being situated in comprehensive talks and discussions with one or more participants (the participation of each guest is registered separately in the case of electronic media).

The “expansion” of the corruption issue is mostly influenced by a common factor - the actual inclusion of the issue in the public debate, additionally triggered by external, “European” evaluations of the situation in the country. In the same time - especially in the

case of print media, understandably, due to unstated but displayed "inclinations" and "rejections" - two more specific factors acted as a catalyst: the early actual start of the local elections campaign and the participation of the presidential institution in the debate.

And if at the beginning of the year the registered texts showed that the corruption issue is tackled most by papers close to the government, this tendency disappeared soon after this, the greatest activity being displayed by the opposition-oriented "Sega" and "Monitor". This entered the "Bulgarian case" in the public practice of the democratic states where - as it is well known - the journalistic anti-corruption investigations are a powerful tool of the opposition. The presence of the issue in "Trud" and "24 Hours" was steady and considerable (the largest accumulation during the last quarter).

The corruption theme which, at the beginning of the year, had rarely been the breaking news or specially emphasized - both in print and electronic media - has gradually turned into a main or stressed upon theme. It is a revealing fact that during the last quarter a total of 58% of the registered newspaper texts were positioned as leading, main or

accentuated. The situation in electronic media was almost the same - 59% were in such a position during the last quarter of the year.

The "expansion" of the issue was clearly displayed by other parameters too. At its initial stage the survey registered a considerable accumulation of short informative texts, related to the corruption issue. Later and in the course of the year, the larger formats occupied an ever increasing space and in the last quarter they accounted for more than half of all registered newspaper texts. At the initial stage of the survey the corruption theme had most often been present in electronic media in the form of short pieces of information, while in the last quarter 34% of the registered units were of considerable duration - up to 7 minutes, up to 15 minutes and over 15 minutes.

The change in the media display of the corruption theme demonstrated itself in the course of the year by yet another parameter. At the initial stage, even the larger newspaper texts - from 70 lines up to a full page - the corruption issue was accompanying, secondary theme, appearing in relation to another one, thus establishing a symmetry

between the print and the electronic existence of the theme, since it was in the short informative texts where corruption was the main point. Later, however, the registered newspaper texts every more often featured corruption as the leading theme, reaching a leading theme presence in 76% of the newspaper texts registered in the last quarter.

The larger volume of the texts always implied the assumption for analysis of the issue, of its varieties, instances, actions and counter actions. At the beginning of the survey, however, this assumption did not find its proof - about 1/4 of the texts featured analysis. Here, too - according to the "type of communication instance" indicator - the change was substantial: during the last quarter 40% of the newspaper texts were characterized by an analytical approach. In electronic media 31% of the texts /as compared to 20% at the beginning/ were analytical - the corruption issue entered more deeply into the discourse and comment field, that being the main reason for the considerable "lengths" in electronic media.

Throughout the survey period corruption was steadily positioned and most often associated on the media field with state institutions, the legisla-

tive system, the local authority. In fact, a transition could be observed in this respect, to a greater attention to the state institutions, while prevalently relating corruption to the presence of administrative position.

### How corruption is spoken of

The initial research hypothesis and expectations as to the manner in which corruption was spoken of and written about were confirmed by the all too many instances of general talk and writing about the issue. Corruption, of course, is not a transparent, visible and open social relation, yet the general anti-corruption rhetoric or assumptions voicing hardly contribute to bringing this phenomenon out into the light. The fact that corruption was most often related to the state institutions in print and electronic media - as was mentioned - actually became pointless and melted in the general talk about corruption. All too often corruption was written about for no particular occasion - corruption existed, corruption was everywhere, the public talked about corruption.

Public talk very often fueled the papers, while, in turn, media talking induced public

talk. The general nature of talking through assumptions, rumors and guessing projected the actual futility of otherwise clearly proclaimed goals. In spite of the fact that a transition was also observed in the course of the survey, towards search for evidence, investigation efforts, we should say that the percentage of "general talk" throughout the year stayed relatively high - even in the last quarter 63% of the newspaper texts on corruption talk generally (71% in the first quarter). However, it should be pointed out that the percentage of "general texts" presenting the typology of the phenomenon, the instances of social corruption, the "political influence trade", the existing pressure tools etc. increased - in other words, the general texts also began revealing the complex nature and varieties of corruption. The general talk in electronic media decreased by almost 20%. The decrease in general talk about corruption is naturally accompanied by transition towards searching for and presenting of evidence.

The presence of verbal initiating various texts presented an interesting feature to the survey.

The sources of verbal events throughout the year all too

often originated from the higher spheres of power, all of them determinantly speaking against corruption - that "grave disease of democracy", "a repulsive offense...using authority for selfish reasons", a quote by the Vice President Todor Kavaldjiev. The more people from the higher spheres of power joined the condemn of corruption, the greater the number of texts with verbal reference. In the first quarter the share of such texts amounted to 14% for print media and 20% for the electronic ones, in the second quarter it was respectively 32% and 47%, while in the third quarter this percentage was 24% and 44%. During the last quarter the communication instances with verbal reference were 29% and 33% respectively.

The analysis showed that throughout the year the greater substantiation pertained to a single corruption deed - the bribe.

The corruption deed - regardless of whether it was verbally assumed or had more specific substance - was dominantly situated on the background of an administrative position (the annual average is 50% of all texts).

The specifics of the bribe defined yet another peculiarity

of the media presence of corruption as well as its transformation. Throughout the survey period this peculiarity was in the predominant absence of the corrupting person and the very act of corruption, while at the end of the year "giving" was even less present than at the beginning.

Such a characteristic may lead to the belief that the media themselves shared the attitude that each and everyone could be a corrupting person, while the essential figure was that of the corrupted, the one having the status and the means. Such absence of the corrupting one might induce and tolerate the attitude towards corruption as being a possible tool for solving an issue, as going beyond the responsibility of the corrupting one, as far as he could obtain something through a corruptive deed, and remaining the sole problem and guilt of the corruptive person.

### **From the "low" to the "high spheres"**

**T**he field between substantiation and generality features a major peculiarity with respect to the change of the media presentation of corruption. The specific nature of the bribe led the public opinion

towards doctors (first quarter), teachers (second quarter), policemen and customs officers (almost throughout the period). At the beginning the higher spheres of power seemed unaffected behind the thick curtain and, it was only natural that the specific cases appeared in the faces of medics, teachers, customs officers, policemen. The impermeability of the higher spheres led to an inflated media presence of corruption among the medics and, later on, among the teachers. The "exemplary actions" of the police for catching corrupted persons which were widely reflected by the media also strongly contributed to this situation. Here is a simple coincidence, highly revealing, though. During the first quarter the highest share in the relatively small number of personalizations in print media went to the doctors - 6%, that share being 8% in electronic media. On sixteen instances the print media called corrupted doctors by their names. In the second quarter the percentage of teachers was among the highest within the instances of personalization - 5% of printed texts in which specific perpetrator was designated and 7% of the similar texts in electronic media. During the second quarter there were sixteen instances in which corrupted

teachers were called by their names in print media (in fact, in ten of these instances the doer was the same). It was on that level where specific actions - arresting mostly - were announced most often.

It can be said for certain that the media inflation of corruption in the "low spheres", introduced mainly through showing of the "exemplary actions" (very often with a reporter present at the arrest?!) has inevitably influenced the public opinion.

If the substantiation of bribe during the first two quarters directed public opinion to "the low spheres", the reflection of verbal events and the general analyses of the phenomenon during the second part of the year and especially in the last three months addressed higher positions in state institutions. The lexeme "swindle" did not replace "bribe" in the frequency dictionary, but it became the key that summarized the abuse of administrative status for personal benefit as well as the benefit of a clientelist circle.

At the same time, on the level of personalization, the name of a former Deputy Prime Minister was mentioned (in fact, he was mentioned throughout the year), as well as those of certain ministers.

The names of two Deputy Ministers were also clearly stated, evidence was also supplied etc. During the third quarter alone, for example, the name of a presidential advisor, accused for corruption, appeared on 19 instances in a corruption context in the papers.

However, the media "explosion" of different corruption accusations in the higher administration did not lead to a clear display of the extent to which the corruption processes in the society are clear and controllable as well as whether there existed intentional shading of the issue. Even the debate regarding the changes in the government, being a media catalyst and itself triggered by the claims about corruption among the ruling circles, did not in fact remove the thick curtain.

The big problem is to what extent the media itself is the cause for the lack of respect towards the publication on the side of those involved, as well as to how much of the reasons are beyond media. In any case, the way in which many cases - brought up by media - were closed did not seem very encouraging for media itself and for the efficiency of its pressure methods. "The battles for discredit", fought years ago with the help of certain

journalists and media inevitably had a negative effect on media efficiency in fighting corruption.

The neglective silence in the face of some investigations was very often the due journalism had to pay for the "errand aptitude" of some of its representatives.

Yet another problem was that, as media survey throughout the year showed, the efficiency or inefficiency of the fight against corruption were treated differently depending on the views of the political power towards which the respective media was inclined. The various social worlds of corruption existed steadily throughout the year and were mostly displayed in the intonational coloring hue of the texts, as well as the views presented. The skepticism and pessimism as to the results of the battle against corruption was characteristic for media of opposing orientation, while the pro governmental media featured larger accumulation of "moderate optimism". The clear "moderate optimists" (in fact, there was no unconditional optimism) remained such at the end of the year, too, while "the skeptics" and "pessimists" preserved their stand.

The greatest moderate opti-

mist during the last quarter, with 30% of all texts which featured optimism, was again "Democratsia" newspaper, followed by "Trud" newspaper with 20%. The most proclaimed one among "the pessimists" was "Duma" newspaper with a 29% share of the texts with expressed pessimism, followed by "Monitor" with 25%, "Sega" and "Trud", with 17% each. There was not a single "optimistic" instance registered in "Duma", as there wasn't a pessimistic one in "Democratsia". The accumulations with respect to the skepticism and optimism options in "Sega" were three times larger than those of "moderate optimism".

The media "social worlds" of corruption throughout the year did not go beyond the social worlds, represented in the political discourse and use of corruption.

Based on the media survey during 1999 certain generalizations and conclusions can be drawn:

\* The placement of "corruption texts" displayed a clear tendency towards presenting them in a leading or accentuated position, the latter being so both for print and electronic media. At the same time throughout the year the number of communication units,

featuring corruption as main and not auxiliary theme, constantly increased. The "expansion" of the theme, its peak being in the last quarter, was revealed in the volume of the separate units, as well as the greater focus on analysis.

\* In the course of the year the media activities regarding corruption clearly displayed a transition from the "low spheres" and everyday aspects of the phenomenon to the higher spheres of state administration. The last quarter saw the media attention completely focused on the higher spheres of state administration. The change brought up an alteration of the very treatment of the phenomenon, revealing its nature of abuse of authority position for personal benefit as well as the benefit of a clientelist circle, as a social corruption, trade of political influence etc.

\* The corruption issue /like many other themes/ was a subject of political use and partisan treatment by media, which had a negative influence on the actual media effects. All too often the political use caused the high and fast death rate of some huge corruption scandals in the course of the yeas, e.g. "the cigarette" and "the spirit" affairs.

\* As a whole, media successfully tried to play the role of important tool for anti-corruption

pressure. The scarce results - determined as such by factors outside media - gave us a reason to believe that a certain media fatigue would occur, even a decrease of media activity as investigation and pressure tool.

It was media itself that called the corruption issue a media "Hit No. 1". If that qualification should be used, one could say that "the hit" did not bring "the income" society expected. And as far as the problem still drastically exists, at the beginning of year 2000 media disposes of a relatively good professional recapitulation, yet with strong doubts regarding their possibilities as being an effective anti-corruption tool. Their realization as such is in their presence as an active participant in "pressure groups" which connect media and civil structures in addressing their arguments to the respective institutions. And the most important - a deliberately declared political will for fighting against corruption, which to be realized as an embodiment of the development of the democratic standards and values in the society.

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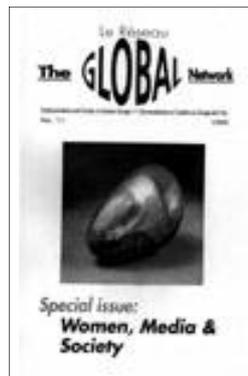
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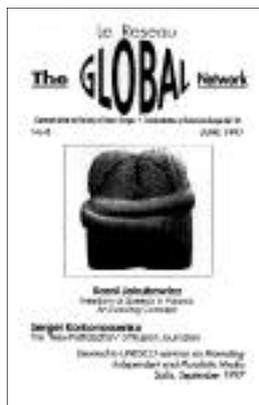
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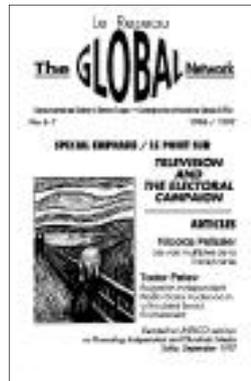
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