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Media Influence Matrix: Bulgaria



**Technology, Public Sphere
and Journalism**

Author: Marius Dragomir and Mariia Altergot

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About the Authors

Marius Dragomir is the Director of the Center for Media, Data and Society. He previously worked for the Open Society Foundations (OSF) for over a decade. Since 2007, he has managed the research and policy portfolio of the Program on Independent Journalism (PIJ), formerly the Network Media Program (NMP), in London. He has also been one of the main editors for PIJ's flagship research and advocacy project, Mapping Digital Media, which covered 56 countries worldwide, and he was the main writer and editor of OSF's Television Across Europe, a comparative study of broadcast policies in 20 European countries.

Mariia Altergot is a researcher with the Center for Media, Data and Society. She graduated from the MA program of the School of Public Policy at Central European University (CEU) where she focused her studies on media and Internet policies. Mariia is from Russia, and holds a BA in Political Science and Policy and Communications from American University in Bulgaria.



Hungary, 1051 Budapest, Oktober 6 str.
number 7, Room 210
Tel: +36 1 327 3000 / 2609
Fax: +36 1 235 6168
E-mail: cmds@ceu.edu

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With its rapidly expanding ICT sector, Bulgaria has been called “the tech capital of Balkans” and “the Silicon Valley of Southeastern Europe.” Including approximately 10,000 companies, the revenues of the local Information and Communications Technology (ICT) market reached US\$ 1bn in 2016⁽¹⁾; and the industry keeps growing: its value was estimated at US\$ 1.4bn in 2017, according to the Bulgarian Association of Software Companies (BASSCOM).⁽²⁾

Technology plays an important role for news media distribution in Bulgaria: 88% of Bulgarians get their news online, first and foremost on the online platforms of popular television channels and their social network pages.⁽³⁾

Bulgarians are some of the most active social media users in the EU (ranked 6th among all EU Member States),⁽⁴⁾ and use Facebook overwhelmingly more than all other platforms – among other purposes, for news consumption.⁽⁵⁾ Because of its astounding popularity, Facebook is the most popular online platform for news media, and the audiences of news outlets attract on their Facebook pages often surpass in numbers those of their own websites. For the same reasons, the platform is notable for its major role in promoting fake news in Bulgaria, which had a particularly strong impact on voters before the last parliamentary election in March 2017.⁽⁶⁾

Google is another international technology company with a dominant position in the market for digital media distribution. Google occupies an overwhelming share of the search engine market across all platforms, and its YouTube is ranked as the second most popular social media platform in the country. On the other hand, Google is the sole international technology company that has contributed finances to the local journalism in Bulgaria: its Digital News Innovation (DNI) Fund has awarded €450,000 in funding to journalistic projects in Bulgaria since its launch in 2015. The fund’s overall influence in the Bulgarian media is insignificant for now, but it did help multiple innovative projects get off the ground.

While the digital news distribution market overall is dominated by the international tech giants Facebook and Google, there are local digital media platforms in Bulgaria, too. The most notable one is Netinfo, the largest digital media company in the country, covering 85% of the users with a wide range of information, communication and entertainment services.

The market leaders Facebook and Google tend to stay politics-neutral as they serve primarily as content distributors, not creators. Among the local tech companies, the political involvement is rather limited, too, although some tensions arise due to the high concentration of media ownership in Bulgaria (which is reflected both online and offline).

1 Kerin Hope, “Bulgaria Strives to Become Tech Capital of the Balkans”, *Financial Times*, 17 October 2016, retrieved online from <https://www.ft.com/content/f9a35122-44f4-11e6-9b66-0712b3873ae1>.

2 BASSCOM, “BASSCOM Barometer 2017. Annual Report on the State of the Software Sector in Bulgaria”, November 2017, available online at

http://www.basscom.org/RapidASPEditor/MyUploadDocs/BASSCOM_Barometer_2017_ENG.pdf

3 Stefan Antonov, “Bulgaria,” *Digital News Report 2018*, retrieved online from <http://www.digitalnewsreport.org/survey/2018/bulgaria-2018/>.

4 Hope, “Bulgaria Strives to Become Tech Capital of the Balkans.”

5 Antonov, “Bulgaria.”

6 “Fake News and Elections in Bulgaria,” *EU vs Disinfo*, 28 March 2017, retrieved online from <https://euvsdisinfo.eu/fake-news-and-elections/>.

This primarily involves the Bulgarian politician and media mogul Delyan Peevski, whose media empire is known for its right-wing, often pro-Russian, opinionated coverage, and his opponent, businessman Ivo Prokopiev, whose media outlets openly criticize Peevski and offer a liberal, pro-European perspective both online and offline.

Although local telcos seem to be totally inoffensive when it comes to news media, they, in fact, can and do exert influence there. Zero-rating practices (allowing users to browse certain websites without actually paying for it) mostly favor international players like Facebook and HBO in Bulgaria. Local telcos now do that mostly for commercial advantages. But when such a distribution arrangement is used to manipulate the media, it will surely become a game-changer.

The entry of the Czech financial group PPF in the Bulgarian telecommunications sector could trigger significant market changes. In July 2018, PPF was given green light by the European Commission to buy Telenor and is in process of acquiring Nova Broadcasting Group, two key players in the telecom and media industries, respectively. But while the former passed all antitrust tests, the Nova deal is still opposed by the Bulgarian competition watchdog, a decision appealed by PPF. If they eventually take over Nova's operations as well, PPF is going to gain a massive competitive advantage in both the media production and distribution segments: local analysts forecast that Telenor and Nova Broadcasting Group would work closely together.

Technology Overview

The Bulgarian society has enthusiastically embraced mobile technologies over the past two decades. Mobile penetration has skyrocketed while the number of fixed-line connections declined. In 2012, the mobile penetration in Bulgaria reached a stonking 147.5%. That figure indicates that a high number of Bulgarians use more than one SIM card. However, between 2010 and 2016, the number of subscriptions for both fixed-line and mobile telephony declined. This is partly explained by the high popularity of online voice and video calls among Bulgarians, used by 85.2% of the internet users.⁽⁷⁾

Bulgaria calling

Telephone penetration in Bulgaria, 2010-2016

Indicator	2010	2011	2012	2013	2014	2015	2016
Fixed-line telephony (total no of subscriptions)	2,164,258	2,272,834	2,132,905	1,942,424	1,816,974	1,654,879	1,478,975
Fixed-line telephony (per 100 inhabitants, %)	29.2	30.9	29.2	26.7	25.2	23.1	20.7
Mobile telephony (total subscriptions)	10,199,942	10,475,083	10,780,732	10,486,824	9,486,927	9,194,633	8,973,869
Mobile telephony (per 100 inhabitants, %)	137.7	142.4	147.5	144.3	131.3	128.1	125.4

⁷ Hope, "Bulgaria Strives to Become Tech Capital of the Balkans" s1.

Internet penetration has also grown massively in Bulgaria during the past decade. In 2017, nearly two-thirds of Bulgarians had access to and used the internet. In spite of that growth though, Bulgaria lags behind the rest of Europe. In 2017, it was the last in Europe in internet usage.⁽⁸⁾ While the average internet penetration in the EU was estimated at 85.7%, with Germany, UK and France leading the pack, the Bulgarian internet penetration rate remained relatively low, at under 60%.

The Bulgarian internet universe

Internet penetration and usage in Bulgaria, 2010-2017

Indicator	2010	2011	2012	2013	2014	2015	2016	2017
No of internet users	3,424,393	3,529,039	3,790,641	3,848,306	3,996,006	4,118,399	4,155,050	4,213,065
Penetration of users (% of total population)	46.2	47.9	51.9	53.0	55.4	56.6	59.8	n/a
No of households with internet connection (% of total)*	46.2	51.0	51.9	53.1	55.5	59.1	63.5	67.3

n/a: not available; *calculated on the basis of total population of individuals aged between 16 and 74 years. Note: the figures from the National Statistical Institute Bulgaria slightly differ from the ITU due to round-up methodological differences.

Source: CMDS based on data from ITU, National Statistical Institute Bulgaria



In 2009, Bulgaria adopted a National Strategy for the Development of Broadband Access as a part of the European Initiative “i2010–A European Information Society for Growth and Employment.” The strategy is aimed at building an open and competitive digital economy. When the strategy was adopted in 2009, Bulgaria lagged behind other EU member states with its broadband penetration at 11.2%, much under the European average then of 22.9%. The main objective set out by the strategy was to extend broadband access to poorly covered regions and ensure that all Bulgarians have access to broadband connection by 2013.⁽⁹⁾ In 2018, this objective is yet to be reached as less than 67% of households have access to broadband internet. However, for those who do have access to the internet, broadband is nearly the only connection option: 99.4% of all households connected to the internet use it.

⁸ Bozhidar Lazarov, “Bulgaria is last in the EU on Internet Usage”, EUScoop, no date, retrieved online from <https://www.euscoop.com/en/2017/10/23/bulgarians-best-in-europe-at-not-using-the-internet>.

⁹ See more details from the strategy on the website of the Ministry of Transport, Information Technology and Communications: <https://www.mtitc.government.bg/en/category/46/program-documents>

Narrowing the digital gap

Broadband connection in Bulgaria, 2010-2017

Indicator	2010	2011	2012	2013	2014	2015	2016	2017
Households with broadband connection (fixed and mobile), total share in the population of the country (%)	26.0	39.8	50.8	53.6	56.5	58.8	62.8	66.9
Fixed broadband (total no of subscriptions)	1,124,723	1,256,796	1,331,746	1,421,552	1,480,889	1,614,541	1,697,590	n/a
Fixed broadband subscriptions per 100 inhabitants (%)	15.2	17.1	18.2	19.6	20.5	22.5	23.8	n/a

n/a: not available

Source: CMDS based on data from ITU, National Statistical Institute Bulgaria

Bulgarian youth aged 16 to 24 are the most active internet users: 88.1% of them regularly browse the internet. When the population is broken down by age, a clear pattern emerges: the older the demographic, the less frequent internet consumption is.

The generation gap

Individuals regularly using the internet

(every day or at least once a week), breakdown by age, 2011-2017

Age group	2011	2012	2013	2014	2015	2016	2017
Total	46.6	50.3	51.2	53.7	54.6	58.1	61.9
16-24	80	81.3	79.5	83.1	84.1	87.2	88.1
25-34	67.7	72	73.5	76.6	82	82.5	84.2
35-44	58.5	65.8	66.6	70.2	69.2	74.9	78.8
45-54	46.5	46.3	47.8	50.9	52.8	56.8	66.1
55-64	26.4	25.9	29.8	32.1	31.4	38.4	42.1
65-74	6.2	8.2	8.3	9	10.5	12.9	16.3

Note: the figures are calculated on the basis of total population of individuals aged between 16 and 74 (%)

Source: CMDS based on data from the National Statistical Institute Bulgaria

The most common personal use of the internet is for communication and access to information purposes. Bulgarians are most active at using the internet for telephony and video calls, according to data from the National Statistical Institute Bulgaria. They are also the most active video callers in the entire EU. Social media is the second most common use of the internet, making Bulgarians the 6th most active social media users in the EU. Online news and e-mail services are two other common uses of the internet, accounting for 74.1% and 70.4%, respectively.

What do Bulgarians do online?

Purpose of using the internet (%) in Bulgaria, 2017

Communication

<i>Sending / receiving e-mails</i>	70.4
<i>Telephoning over the internet/video calls (via webcam) over the internet (using applications, e.g. Skype or Facetime)</i>	85.2
<i>Participating in social networks (creating user profile, posting messages or other contributions to Facebook, Twitter, etc.)</i>	78.8
<i>Uploading self-created content (text, photos, music, videos, software etc.) to any website to be shared</i>	45.9

Access to information

<i>Reading online news / newspapers / news magazines</i>	74.1
<i>Seeking health-related information (e.g. injury, disease, nutrition, improving health, etc.)</i>	53.1
<i>Finding information about goods or services</i>	62.0

Civic and political participation

<i>Posting opinions on civic or political issues via websites (e.g. blogs, social networks, etc.)</i>	11.9
<i>Taking part in on-line consultations or voting to define civic or political issues (e.g. urban planning, signing a petition)</i>	4.1

Professional life

<i>Looking for a job or sending a job application</i>	10.4
<i>Participating in professional networks (creating user profile, posting messages or other contributions to LinkedIn, Xing, etc.)</i>	3.4

Other online services

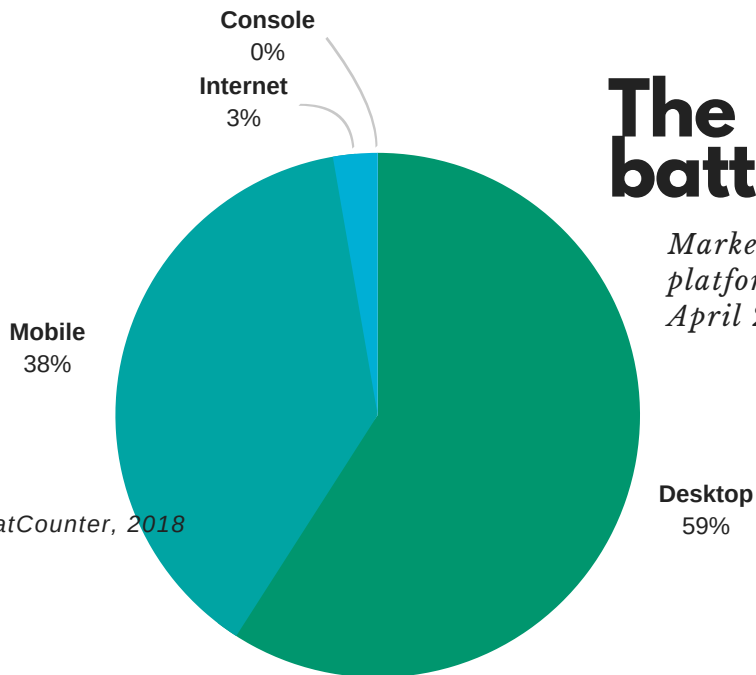
<i>Using services related to travel or travel related accommodation</i>	17.1
<i>Selling of goods or services, e.g. via auctions (e.g. eBay)</i>	7.8
<i>Internet banking</i>	8.7

Source: CMDS based on data from the National Statistical Institute Bulgaria

10 Kerin Hope, "Bulgaria strives...", *Financial Times*, cit.

11 Kerin Hope, "Bulgaria strives...", *Financial Times*, cit.

While desktop computers account for the largest share of the device market, Bulgarians are increasingly accessing the internet from mobile devices. If in 2012 a vast majority of users (85.8%) did not use the internet away from stationary computers at home or at work, in 2017 their number shrank to 12%. The most popular type of mobile device used for internet access is mobile phone (smartphone), used by 84.2% of all Bulgarian internet users.



The platform battle

Market share of computer platforms (%) in Bulgaria, April 2018

Source: StatCounter, 2018

Mobile browsers

Individuals using mobile devices to access the internet, 2012-2017

	2012	2013	2014	2015	2016	2017
Mobile phone/Smartphone	13.2	24.6	41.7	59.4	69.1	84.2
Portable Computer (laptop, tablet)	21.3	25.6	27.8	36.5	30.4	35.7
Other mobile devices	2.0	2.2	3.0	2.8	1.6	2.0
Don't access the internet away from home or work	85.8	62.8	50.5	32.9	25.6	12.0

Note: Figures are calculated on the basis of individuals who used the internet in the last three months (%)

Source: CMDS based on data from the National Statistical Institute Bulgaria

The OS game

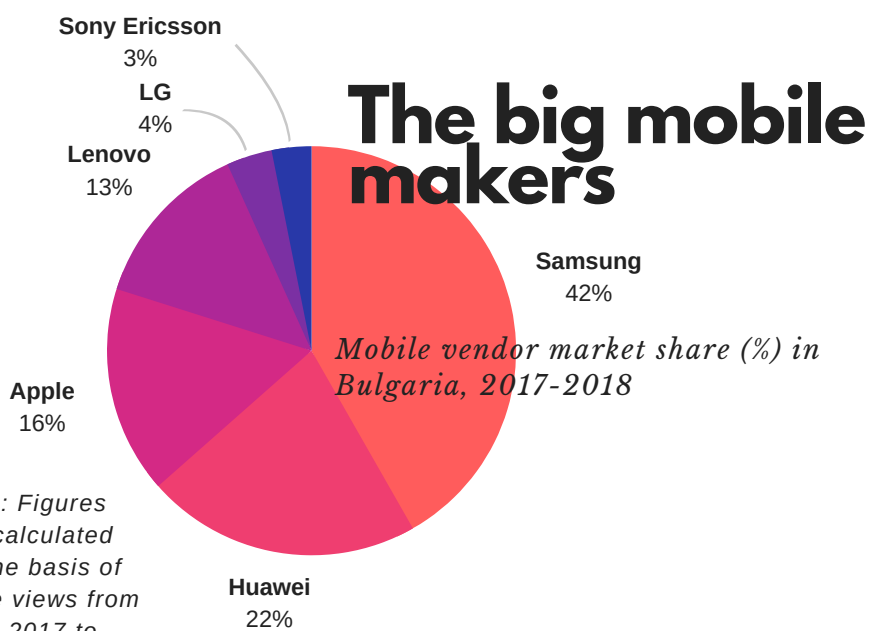
The market for operating systems is largely shared between Windows and Android. While Windows accounts for nearly 94% of the market for desktop OS, Android takes up 84.5% and 72.1% of the market for mobile phones and tablets, respectively.

Operating System market share (%) in Bulgaria, 2017-2018

OS	Windows	Android	iOS	OS X	Linux
All platforms	57.8	32.3	5.7	1.7	1.3
Desktop	93.5	n/app	n/app	2.7	2.1
Mobile	1.4	84.5	13.5	n/app	n/app
Tablet	0.2	72.1	27.7	n/app	n/app

Note: Figures are calculated on the basis of page views from April 2017 to April 2018; n/app: not applicable

Source: StatCounter, 2018



Note: Figures are calculated on the basis of page views from April 2017 to April 2018
Source: StatCounter, 2018

The browser game

Google dominates the market for search engines, occupying nearly the entire the market across platforms. With its Chrome browser, it also has a dominant position in the browsing market. Several years ago, the competition on the Bulgarian market included several local search engines (such as Dir.bg and Gbg.bg), but by now these platforms have become primarily news distributors and producers.

Socializing online

Social media market share (%) in Bulgaria, 2017-2018



	Facebook	YouTube	Pinterest	Twitter	Instagram
All platforms	96.7	0.9	0.9	0.7	0.2
Desktop	93.6	1.5	1.2	1.7	n/a
Mobile	98.1	0.6	0.7	0.2	0.2
Tablet	97.9	0.6	0.9	0.3	n/a

Note: Figures are calculated on the basis of page views from April 2017 to April 2018; n/a: not available
Source: StatCounter, 2018

Note: Figures are calculated on the basis of page views from April 2017 to April 2018; n/app: not applicable
Source: StatCounter, 2018

Browser market share (%) in Bulgaria, 2017-2018	Browser	Chrome	Firefox	Safari	IE	Opera	Samsung Internet	Edge	Android
All platforms		65.8	14.4	5.9	4.3	2.5	2.2	1.4	2.1
Desktop		62.9	23.2	1.2	6.3	3.4	n/app	2.21	n/app
Mobile		77.3	n/app	12.7	0.6	0.6	5.3	n/app	2.2
Tablet		45.7	1.9	24.6	n/app	0.6	n/app	n/app	26.3

The hide-and-seek online

Search engine market share (%) in Bulgaria, 2017-2018

Search Engine	Google	Bing	Yahoo!
All platforms	97.97	0.94	0.84
Desktop	96.55	1.67	1.41
Mobile	99.63	0.17	0.11
Tablet	98.11	1.07	0.54

Note: Figures are calculated on the basis of page views from April 2017 to April 2018

Source: StatCounter, 2018

Facebook is the unchallenged leader in social media in Bulgaria, used by 84% of the country's social media users.⁽¹²⁾ Facebook is also the most popular online platform for digital media consumption and distribution. According to Boyan Ivanovich of Perceptica Media Analytics, a Sofia-based media intelligence organization, Facebook is the primary platform online for most news media companies, surpassing the audience reach of the websites run by the media outlets themselves. Concentrating their efforts on Facebook, media companies tend to largely ignore other social media platforms (for example, Twitter). Because of its high popularity among both users and producers, Facebook is also the primary platform for the distribution of fake news in Bulgaria.⁽¹³⁾ (See *The Disinformation Market in this report*)

Google's YouTube is the second most popular social media platform, used by 70% of social media users.⁽¹⁴⁾ In the past, YouTube faced competition from a domestic video platform, Vbox7.com, which in time lost its popularity, allowing YouTube to become the leader on this market. Vbox7.com is owned by the Nova Broadcasting Group, which runs its own channels on YouTube as do most of the major news media in the country.

¹² Stefan Antonov, "Bulgaria" in Reuters Institute for the Study of Journalism (RISJ), *Digital News Report, 2018*, retrieved online from <http://www.digitalnewsreport.org/survey/2018/bulgaria-2018/>

¹³ Interview with Boyan Ivanovich, Perceptica Media Analytics, *Media Influence Matrix Interviews*







¹⁴ Stefan Antonov, "Bulgaria", *cit.*

INTERNET & MOBILE

The Bulgarian online media and news distribution market is dominated by international companies. The two biggest players are Facebook and Google, which have overwhelming shares in their respective social media and search engine markets. It is on Facebook that media companies concentrate their outreach efforts as the audience there is often larger than on the outlet's own websites. Nevertheless, most of the largest news media platforms in Bulgaria have their own online websites, and usually benefit from the online platforms run by their parent companies. One of Bulgaria's most notable local companies for online news distribution is Netinfo. It is the largest digital media company in the country, which provides a wide range of information, communication and entertainment services. It is owned by the Nova Broadcasting Group (one of the largest media groups in Bulgaria, a subsidiary of the Sweden-based Modern Times Group).

The big players in internet and mobile

Key players in the Bulgarian internet and mobile market, breakdown by services

	Email service	Messaging and VoIP	Mobile ecosystems	Search	Social network & blog	Video & photo
	✓	✓	✓			
		✓			✓	✓
	✓		✓	✓		✓
	✓	✓		✓		✓
	✓			✓		✓
SAMSUNG			✓			
					✓	✓

Note: In the categorization of technology companies in this section we have used the methodology of the Ranking Digital Rights project, which divides companies in two groups. The first group, internet and mobile, includes the so-called "mobile ecosystems," companies that create mobile devices and products. In the second category, telecommunications companies, we include service operators that offer connection and access services such as voice, data or cable connections. (For more, see Methodology in this report)

Source: CMD5 based on company data



Facebook does not have an office in Bulgaria; its operations in the country are handled by the regional office for Central and Eastern Europe in Warsaw, Poland. That office was opened in 2016 with the aim of boosting the company's regional marketing and sales efforts.⁽¹⁵⁾ It is led by Robert Bednarski who held multiple senior positions in the digital media industry in Poland.⁽¹⁶⁾



Since 2015, Google operates a subsidiary in Bulgaria registered under the name Google Bulgaria EOOD. The sole owner of the company is listed as Google International LLC. The office's work is focused on commercial activities, helping local companies maximize the use of the corporation's services. The company did not elaborate on exactly what kind of help is being provided.⁽¹⁷⁾

When Google opened shop in Bulgaria, word on the street was that the company's local subsidiary would become part of the Sofia Tech Park, a state-owned company specializing in the development of research and innovation.⁽¹⁸⁾ No developments have been noticed since then.

One of the directors at Google's EU quarters in Dublin, Paul Terence Manicle⁽¹⁹⁾, is listed in the Bulgarian trade registry as the CEO of the Google office in Bulgaria. Financial data about Google's operations in Bulgaria are scant. Except for 2015 when Google in Bulgaria declared sales revenues of €132,000 and a net profit of €10,000, the Bulgarian trade registry offers no other information.



Netinfo AD is Bulgaria's largest digital media company, covering 85% of the internet audience. Its services and products include online portals and email (Abv.bg), cloud storage and file sharing, search engines (Gbg.bg, Izgodnieferti.bg, Carmarket.bg, Sravni.bg), web hosting and advertising services.⁽²⁰⁾ The company also offers news on its websites Vesti.bg, Pariteni.bg, Sinoptik.bg, Gong.bg and Edna.bg, as well as entertainment content including videos, games, music and gambling.

¹⁵ Emilia Wedziuk, "Facebook opens its CEE headquarters in Warsaw", *ITKey*, 6 March 2016, retrieved online from <https://itkey.media/facebook-opens-cee-headquarters-warsaw/>.

¹⁶ See more about Bednarski in *Bloomberg Company Overviews* section, retrieved online from <https://www.bloomberg.com/research/stocks/private/person.asp?personId=38571044&privcapId=20765463>

¹⁷ Iulian Arnaudov, "Какво ще прави Google в България" (*What will Google do in Bulgaria*), 17 March 2015, retrieved online from https://www.capital.bg/biznes/kompanii/2015/03/17/2493091_kakvo_shte_pravi_google_v_bulgariia/.

¹⁸ See more about the company on its website: <http://sofiatech.bg/en/about/team-and-management/>

¹⁹ Rob Davies, "How much does Google's European boss really earn?", *The Guardian*, 11 February 2016, retrieved online from <https://www.theguardian.com/technology/2016/feb/11/is-it-possible-to-work-out-how-much-google-executives-are-earning>

²⁰ See more about the company here: <https://www.estat.bg/en/resources/netinfo>.

Among the products and services offered by Netinfo, Abv.bg in particular is worth noting: it is a news portal and the largest local email provider in Bulgaria with over 3.5 million active accounts (21), which makes it the fifth most visited website in the country, according to data from Alexa, an analytics firm.

Netinfo was founded in 1998 by Lyuben Belov and Victor Penev, who were inspired by the Western-style internet companies at the height of the American “dotcom bubble”, a rapid increase of investments in internet companies, which accelerated in the late 1990s.(22) In 2008, the company was acquired by the Finnish conglomerate Sanoma Magazines International (SMI). Then, in April 2013, it was sold to the Bulgarian commercial radio operator company Darik Radio.(23) In August 2013, Netinfo was sold again, this time, to one of Bulgaria’s largest media groups, Nova Broadcasting Group, a subsidiary of the international, Sweden-based, broadcasting group Modern Times Group (MTG).(24) At that time, Nova Broadcasting Group acquired 70% of Darik Radio’s assets, including Darik News and Netinfo, which covered all the websites owned by Darik Radio. In 2013, these websites combined generated over 750 million monthly page views, three million individual monthly users, and €4.2m in revenues. At the moment of acquisition, MTG also announced the possibility of acquiring the remaining 30% in Darik Radio within the following five years, but there have been no further developments.(25)

Under MTG’s ownership, Netinfo began its expansion in 2016 when the company acquired 51% in the largest online shopping website in Bulgaria, Grabo.bg, 51% in another popular online store, Trendo.bg, and 20% of an online platform for shopping catalogues, Broshura.bg, thus expanding into 18 new markets.(26)

The current CEO of Netinfo is Hristo Hristov, a cofounder of Darik News, who remained in his position after Netinfo’s acquisition by MTG. Financial data for Netinfo are not publicly available.

21 See more about these services here: http://info.netinfocompany.bg/res/loreal_skinad/

22 Asen Georgiev, Andrian Georgiev, Lili Apostolova, “История на дот бг мечтата...” (The story of the .bg dream...), *Capital*, 30 April 2008, retrieved online from

https://www.capital.bg/biznes/kompanii/2008/04/30/491421_istoriia_na_dot_bg_mechtata/.

23 “Дарик купува ‘Нетинфо’” (Darik buys Netinfo), *DarikNews*, 22 April 2013, retrieved online from <https://dariknews.bg/novini/biznes/darik-kupuva-netinfo-1074252>

24 “Bulgaria’s Netinfo buys 20% of shopping catalogues platform Broshura.bg owner”, *SeeNews*, 5 July 2013, retrieved online from <https://seenews.com/news/bulgarias-netinfo-buys-20-of-shopping-catalogues-platform-brochurabg-owner-531505#sthash.lrc5p4lm.dpuf>.

25 “MTG acquires leading Bulgarian online business”, *MTG Press Release*, 6 August 2013, retrieved online from <https://www.mtg.com/press-releases/mtg-acquires-leading-bulgarian-online-business-2/>.

26 “Bulgaria’s Netinfo buys 20%...”, *SeeNews*, cit.

TELECOMMUNICATIONS

The market for telecommunications in Bulgaria is largely dominated by three players: Vivacom, Telenor, and A1 Bulgaria (formerly Mtel). All three deliver integrated telecommunications services: mobile and fixed services, broadband, and satellite and cable television. A1 and Telenor both partner with HBO GO, the on-demand server of the American movie channel HBO, whereas A1 and Vivacom both offer online television streaming, which is very popular in Bulgaria.⁽²⁷⁾ Bulsatcom is another notable provider of telecom services in Bulgaria. It is the largest TV provider in the country with over 650,000 subscribers. Bulsatcom, however, is doing worse financially than its three main competitors, according to market data. In 2017, Bulsatcom took new loans from the American Exim Bank and a Deutsche Bank-led consortium of European banks to build and launch its own satellite.⁽²⁸⁾ The project cost a total of US\$ 235m (€200m). The satellite, Bulgaria's first, was launched in summer 2017.⁽²⁹⁾

In 2015, A1 Bulgaria (at that time Mtel) acquired 100% of a large cable operator, Blizoo, becoming the largest broadband company in the country with nearly 500,000 subscribers at the time of the merger. Blizoo offered cable TV, high-speed internet, and voice telephony with 2,000 km of fibre-optic backbone.⁽³⁰⁾

Telenor was a company belonging to Norway-based Telenor Group. In July 2018, Telenor was sold to the PPF Group of Petr Kellner, a Czech billionaire and one of the richest and most influential people in Eastern Europe.⁽³¹⁾ The deal was approved by the European Commission. The Bulgarian Telenor operations were purchased in a package that included Telenor businesses in Hungary, Montenegro and Serbia. Along with Telenor, Nova Broadcasting Group, too, might be acquired by one of Kellner's companies that specializes in media acquisitions. However, in July 2018, Bulgaria's competition regulator banned the acquisition of the full stake in Nova Broadcasting Group by PPF TMT Bidco 2, a PPF vehicle.⁽³²⁾ PPF has appealed the decision.

²⁷ Interview with Boyan Ivanovich, *Perceptica Media Analytics*, cit.

²⁸ Konstantin Nikolov, "Satellite Disturbances of Bulsatcom," *Kapital.bg*, 11 August 2017, retrieved online from https://www.capital.bg/biznes/kompanii/2017/08/11/3022150_satelitnite_smushteniia_na_bulsatkom/

²⁹ "Bulgaria's first communications satellite launched into orbit", *Reuters*, 24 June 2017, available online at <https://www.reuters.com/article/us-space-launch-bulgaria/bulgarias-first-communications-satellite-launched-into-orbit-idUSKBN19F05U>

³⁰ "CPC Approves M-Tel's Takeover of Blizoo," *TeleGraphy*, 21 September 2015, retrieved online from <https://www.telegeography.com/products/commsupdate/articles/2015/09/21/cpc-approves-m-tels-takeover-of-blizoo/>.

³¹ "PPF completes buy of Telenor's assets in Bulgaria, Montenegro, Serbia, Hungary", *SeeNews*, 31 July 2018, available online at <https://seenews.com/news/ppf-completes-buy-of-telenors-assets-in-bulgaria-montenegro-serbia-hungary-621974#sthash.RyK80M8v.dpuf>

³² "Bulgaria's anti-trust body bans PPF acquisition of Nova Broadcasting Group", *SeeNews*, 19 July 2018, available online at <https://seenews.com/news/update-1-bulgarias-anti-trust-body-bans-ppf-acquisition-of-nova-broadcasting-group-620578#sthash.e8j2KbHm.dpuf>

Vivacom’s ownership has been marred by controversies in the past two years because of its alleged links with the Russian government. In 2012, a majority share (94%) of Vivacom was jointly acquired by the Bulgarian Corporate Commercial Bank (CCB) and VTB Capital, the UK investment subsidiary of the Russian state-owned bank VTB.⁽³³⁾ In Russia, VTB is one of the leading banks, which allegedly has informal links with the Kremlin.⁽³⁴⁾ In August 2016, following the collapse of CCB, VTB Capital transferred the majority stake in Vivacom to the Bulgarian entrepreneur Spas Rusev who in the past has been suspected of links to organized crime.⁽³⁵⁾ Rusev now holds 46% of Vivacom’s shares while VTB Capital owns 20%. Another 19% is held by Delta Capital, also controlled by the management of the VTB Capital’s Bulgarian division.⁽³⁶⁾

The transfer of shares to Rusev was disputed in court by Dmitry Kosarev, a Russian businessman who is the principal stakeholder in Vivacom and the owner of LIC Telecommunications and Empreno Ventures. Both these companies are complainants in the case.⁽³⁷⁾ Empreno Ventures was specifically set up as an investment vehicle to control Kosarev’s stake in Vivacom.⁽³⁸⁾ According to complainants, the sale of Vivacom’s shares was a fraud and an attempt to illegally transfer Vivacom “to a connected party for a grossly undervalued sum.”⁽³⁹⁾ The proceedings are held in front of the English High Court, and are ongoing.⁽⁴⁰⁾

Dominated by Vivacom, Telenor and Al, the Bulgarian telecom market also includes many smaller local providers (focused on selected regions) such as Networx, which covers nine out of 28 provinces⁽⁴¹⁾, and Net1, which covers only the Sofia region.⁽⁴²⁾

33 “Update 2-VTB Bank, CCBank to Acquire Bulgarian Telecoms Firm,” Reuters, 7 August 2012, retrieved online from <https://www.reuters.com/article/bulgaria-vivacom-sale/update-2-vtb-bank-ccb-bank-to-acquire-bulgarian-telecoms-firm-idUSL6E8J7ADZ20120807>.

34 Max Seddon, “Cashflow and the Kremlin,” Financial Times, 26 August 2016, retrieved online from <https://www.ft.com/content/f26b2d3c-63d3-11e6-8310-ecf0bddad227>.

35 Maria Guineva, “Businessman Suspected of Past Links to Organized Crime Buys Bulgarian Telecom,” Organized Crime and Corruption Reporting Project, 1 December 2015, retrieved online from <https://www.occrp.org/en/daily/4664-businessman-suspected-of-past-links-to-organized-crime-buys-bulgarian-telekom>.

36 “Spas Rusev Finalises Vivacom Takeover,” Telegeography, 1 September 2016, retrieved online from <https://www.telegeography.com/products/commsupdate/articles/2016/09/01/spas-roussev-finalises-vivacom-takeover/>.

37 Thomson Reuters, “London Judge Rules Auction-Rigging Case Can Go To Full Trial,” Empreno Ventures, 6 March 2018, retrieved online from <https://www.emprenoventures.com/media-about-us/>.

38 “About Empreno Ventures,” retrieved online from <https://www.emprenoventures.com/#about-section>.

39 “UK Subsidiary of Russian State Bank VTB to Face Legal Action in London’s High Court Over Vivacom Sale,” Globe News Wire, 11 March 2016, retrieved online from <https://globenewswire.com/news-release/2016/03/11/818976/0/en/UK-Subsidiary-of-Russian-State-Bank-VTB-to-Face-Legal-Action-in-London-s-High-Court-Over-Vivacom-Sale.html>.

40 “The English High Court Confirms Empreno Ventures Ltd’s Right to Continue Proceedings Against VTB Capital Plc for Its Fraudulent Sale of Vivacom,” 7 February 2018, available online at <https://www.emprenoventures.com/news/2018/3/7/the-english-high-court-confirms-empreno-ventures-ltds-right-to-continue-proceedings-against-vtb-capital-plc-for-its-fraudulent-sale-of-vivacom>.

41 “Company Overview of Networx Bulgaria EOOD,” emis.com, retrieved online from [https://www.emis.com/php/company-profile/BG/Networx_Bulgaria_EOOD_%D0%9D%D0%B5%D1%82%D1%83%D0%BE%D1%80%D0%BA%D1%81_%D0%91%D1%8A%D0%BB%D0%B3%D0%B0%D1%80%D0%B8%D1%8F_%D0%95%D0%9E%D0%9E%D0%94_%D0%94%D0%9E%D0%9E%D0%94_%bg_2443477.html](https://www.emis.com/php/company-profile/BG/Networx_Bulgaria_EOOD_%D0%9D%D0%B5%D1%82%D1%83%D0%BE%D1%80%D0%BA%D1%81_%D0%91%D1%8A%D0%BB%D0%B3%D0%B0%D1%80%D0%B8%D1%8F_%D0%95%D0%9E%D0%9E%D0%94_%D0%94%D0%9E%D0%9E%D0%94_%D0%94%D0%9E%D0%9E%D0%94_%bg_2443477.html).

42 “About us,” Net1.bg, retrieved online from <https://www.net1.bg/%D0%97%D0%B0%20%D0%BD%D0%B0%D1%81>.

The telecom giants

Sales revenues of prominent telecommunication operators and internet service providers in Bulgaria, 2014-2017

COMPANY	OWNERSHIP	COUNTRY OF OWNERSHIP	SALES REVENUE (€ '000)			
			2014	2015	2016	2017
Vivacom (Bulgarian Telecommunication Company)	46% Spas Rusev 20% VTB Capital 19% Delta Capital	Bulgaria, Russia (UK subsidiary)	411,979	433,507	447,516	454,632
Telenor (formerly Globul)	100% PPF	Czech Republic	326,272	328,317	340,935	345,024
A1 Bulgaria (formerly Mtel)	100% A1 Telecom Austria Group (subsidiary of America Movil)	Austria	n/a	364,700	412,000	431,200
Bulsatcom*	25% Plamen Genchev 25% Maxim Zayakov	Bulgaria	76,466	78,531	79,820	79,527

n/a: not available; *ownership data from the Internet Ownership Project
Source: CMDS based on company annual reports

Technology Companies & Government

There is little evidence of government involvement in the field of technology. Digital platforms in Bulgaria are not subject to any specific regulations. However, recently, Sofia Vladimirova, the chair of the broadcast regulator in Bulgaria, the Council for Electronic Media, said that the council might begin regulating online media, too.⁽⁴³⁾

A single notable case of government involvement in the technology sector took place in 2016, when a cartoonist, Chavdar Nikolov, uploaded a videoclip mocking the Bulgarian Prime Minister Boyko Borisov on Vbox7.com and on TV Nova's own website. This and other videos of Nikolov were then quickly taken down, leading to speculations about links between the government and Nova group. Nova officials claimed that Nikolov's contract had simply expired and thus his work was removed; but, under pressure and accusations of censorship, the company eventually restored the content and offered a new contract to Nikolov (that he refused).⁽⁴⁴⁾

The content of both foreign-owned Nova and bTV is largely entertainment and commerce-driven ("one reality show after the other," according to Martin Marinos, a Bulgarian media scholar, interviewed for this report).⁽⁴⁵⁾ The two media groups control a large share of the online media distribution market, but both have neutral positions when it comes to politics, which is why the politics-related news content created and shared by these groups is considered by experts to be rather objective.

In contrast, New Bulgarian Media Group (NBMG) and Economedia, take much more distinct political stances, often in direct confrontation with each other, both offline and online. Like Nova and bTV, NBMG and Economedia have a vast portfolio of their own online outlets for content distribution, but their content is much more politicized than what Nova and bTV produce. NBMG, owned until recently by Delyan Peevski, an MP and media mogul, is known for promoting slanted reporting and for supporting not only the political party he belongs to (the Movement for Rights and Freedoms (DPS), a party of the ethnic Muslim minority in Bulgaria), but also any other party in power. "Corruption and collusion between media, politicians, and oligarchs is widespread. The most notorious embodiment of this aberrant state of affairs is Delyan Peevski (an MP from the DPS), a former head of Bulgaria's main intelligence agency and owner of the New Bulgarian Media Group," Reporters Without Borders said in a report.⁽⁴⁶⁾ Economedia, on the other hand, is co-owned by the influential businessman Ivo Prokopiev, an outspoken liberal and critic of Peevski.⁽⁴⁷⁾ The two most influential online news outlets owned by Economedia are the online platforms of the daily Dnevnik and weekly Capital.

43 "The Bulgarian Council for Electronic Media is Finally Planning to Regulate Online Media as well", *Novinite.com*, 10 May 2018, retrieved online from <https://www.novinite.com/articles/190006/The+Bulgarian+Council+for+Electronic+Media+is+Finally+Planning+to+Regulate+Online+Media+as+well>.

44 Interview with Boyan Ivanovich, *Perceptica Media Analytics, Media Influence Matrix Interviews, Bulgaria, cit.*

45 Interview with Martin Marinos, *Media Influence Matrix Interviews, Bulgaria, cit.*

46 "Corruption and collusion between media, politicians, and oligarchs is widespread", *Reporters Without Borders (RSF), in Bulgaria dossier*, available online at <https://rsf.org/en/bulgaria>

47 See his writings on his blog at <https://ivoprokopiev.com/en/>

Technology Companies & Media

The distribution of digital news in Bulgaria takes primarily two forms: via the international platforms of Facebook and Google, which dominate the online distribution market, and via news and entertainment websites owned by the content producers, mainly large media groups like Nova, bTV, NBMG, and EconoMedia.

Along with Google, Facebook became the leading digital platform for news media distribution in Bulgaria after the 2009 financial crisis. The crisis was a key moment for the Bulgarian market in general, when the promise of growth was shattered by international players, with which local companies found it difficult, if not impossible, to compete.

This tension continues today. It is still highly challenging for online news outlets to have a strong online presence without relying on Facebook and Google as their primary distribution platforms, according to journalists and experts interviewed for this report. Most media companies have a larger audience reach via Facebook than through their own websites. At the same time, media outlets owned by the large media groups have their own online operations, including Nova's Abv.bg server and Netinfo platforms, and their own news websites such as EconoMedia's Dnevnik and Capital.

On the other hand, local telecommunications groups exert a significant influence in the country's media market through their subscription practices. Zero-rating is a game changer.

Introduced only after 2015, zero-rating is an offer allowing mobile customers to browse certain websites without consuming their monthly allocated data. Al Bulgaria and Telenor have been practicing zero-rating in the past four years, according to data from the European Commission. Telenor has been offering such zero-consumption services to its customers for Facebook, Whatsapp (another Facebook company) and HBO Go. Al Bulgaria has been offering a similar service for Viber (an instant messaging platform operated by Japanese company Rakuten), Facebook, YouTube and Vbox7.

Zero-rating is used by telecommunications companies mostly as a competitive advantage and not as a strategy to influence the media market. But by allowing their customers to access certain websites without consuming their data allowance, telcos indirectly favor the online platforms included in the zero-rating package as this offer gives consumers a permanent incentive to continuously visit those websites. Ironically, in Bulgaria, Facebook, the social media that hobbled the domestic online portals, is given a free ride on the country's mobile phones while local portals, struggling to turn a penny, do not enjoy such deals.

A development that could have a major impact on the Bulgarian media is the entry of the Czech financial group PPF in Bulgaria through the acquisition of Telenor operation. PPF is a behemoth with interests in a bevy of industries and a long history of controversy around the source of its cash. In parallel with the Telenor deal, PPF has tried to buy Nova Broadcasting Group from MTG, its Swedish owner. The deal was blocked by local antitrust authorities. The entry of PPF into Nova would give the Czech company significant power in the media sector as they would be in control of big chunks of both the production and distribution markets.

FACEBOOK



The most popular Facebook pages for Bulgaria are celebrity fan pages (the bodybuilder Lazar Angelov with over 15.2m followers and the Bulgarian-born Canadian actress Nina Dobrev with more than 6m followers) and lifestyle and fashion pages (Wedding Dresses with nearly 45m followers and Amazing Hairstyles with some 3m followers).

News media rank lower: the most popular media outlet on Facebook, Novini.bg, is on the 6th position in the overall rating of Facebook pages. Three out of ten most popular Facebook pages for media outlets belong to Sportal Media Group: Novini.bg, Woman.bg and Sportal.bg. Facebook pages of two television programs, a cooking show and the comedy show Gospodari na Efira, feature among the top ten most popular media pages on Facebook. Both shows are aired by Nova Broadcasting Group.

Most liked media



THE DISINFORMATION MARKET

But while Facebook is a major distribution platform for news media, it has also helped an emerging disinformation industry prosper on the Bulgarian internet. Fake news proliferates in Bulgaria. A nationwide poll conducted in 2017 by Alpha Research, the largest independent marketing research agency in Bulgaria, found that 72% of Bulgarians have encountered fake news in the media.⁽⁵⁰⁾ The phenomenon is especially troubling online: fake stories increasingly get picked up from foreign platforms (namely, from Russia) by the marginal and “yellow” media in Bulgaria, and eventually make their way up to the more serious and reliable news sources, both in Bulgaria and abroad.⁽⁵¹⁾ Among the online platforms, Facebook has been identified by the experts interviewed for this report as the primary channel for dissemination of fake news.⁽⁵²⁾

Fake stories and disinformation saw a rise in Bulgaria just before the latest parliamentary elections of March 2017. According to EU vs. Disinformation, an online campaign of the European External Action Service East Stratcom Task Force for combating pro-Kremlin disinformation, “pro-Russian and anti-Western news outlets mushroomed just before the elections, and their messaging was further multiplied by an army of social media accounts, pushing messages like ‘Death of the European Union,’ ‘NATO is a tumor,’ or ‘Attack against Putin.’”⁽⁵³⁾ Furthermore, as reported by the Wall Street Journal, a secret strategy document prescribed the use of fake news and exaggerated polling data to succeed in elections.⁽⁵⁴⁾

Information about who’s behind the fake news sites that target the Bulgarian public is scarce. In one case, an online citizens-driven initiative known as Clean Internet has identified Stefan Proynov, a single person, to be responsible for managing dozens of websites and hundreds of Facebook profiles spreading fake content and “trolling.” Proynov, his wife Elena Dimitrova and son Adrian Dimitrov share on a daily basis hundreds of stories against refugees, Turks and Roma people, and in support of the Russian government. Proynov’s and his family’s activities, however, are not coordinated from Russia, and are entirely Bulgaria-based. In an interview with Dnevnik, Bojan Znepolski, a sociologist, noted that the motivation for such pro-Russian trolling and propaganda is to exert influence on the Bulgarian political processes. Proynov, for example, is driven by vengeance to reduce the power of the re-elected, pro-European party GERB, which “cooked up criminal charges” against him for the open criticism of its policies.⁽⁵⁵⁾

50 “Most Bulgarians Come Across Fake News,” *Bnr.bg*, 27 June 2017, retrieved online from <http://bnr.bg/en/post/100846678/most-bulgarians-come-across-fake-news>.

51 Daniel Penev, “Anatomy of Fake News: the Bulgarian Case,” *South East European Network for Professionalization of Media*, 16 January 2018, retrieved online from <http://seenpm.org/anatomy-fake-news-bulgarian-case/>.

52 Interview with Boyan Ivanovich, *Perceptica Media Analytics, Media Influence Matrix Interviews, Bulgaria*, cit.

53 “Fake News and Elections in Bulgaria,” *EU vs Disinfo*, 28 March 2017, retrieved online from <https://euvsdisinfo.eu/fake-news-and-elections/>.

54 *Ibid.*

55 Michael Colborne, “Bulgarian Fake News Agents Often Promote Moscow’s Line Not For Russia’s Sake, but For Their Own Political Interests,” *StopFake.org*, 9 May 2017, retrieved online from <https://www.stopfake.org/en/made-in-bulgaria-pro-russian-propaganda/>.

Bulgarian media and technology companies have attempted to combat the spread of disinformation, but these efforts have been sporadic and lacked in unity.⁽⁵⁶⁾ In August 2017, Nova Broadcasting Group launched its own online fact-checking platform on [Nova.bg/proveri](https://nova.bg/proveri), which allows users to submit suspicious stories, and share those already checked.⁽⁵⁷⁾ Economedia’s online news portal Dnevnik, too, introduced its own campaign for combating fake news. These individual efforts have not been coordinated, however, which leads experts and journalists to be skeptical about the effectiveness of the current battle with online fake news in Bulgaria.⁽⁵⁸⁾

GOOGLE



Information and news media do not have a significant share of the YouTube Bulgarian market. The platform in Bulgaria is primarily dominated by music channels (Planeta Official, Facing the Sun Official, Diapason Records, Slavi Trifonov & Ku-Ku Band, CDeep Music, MonteMusic Ltd.). Of those, the most popular is the YouTube profile of the television channel Planeta.

The YouTube channel of bTV Media Group ranks 7th in the overall rating, and the YouTube channel of Nova ranks 16th. These two, and Sportal.bg, on the 33rd position, are the most prominent news media on YouTube. All the other popular channels are mostly geared on entertainment.

The motion picture

Most watched media on YouTube, June 2018

	NUMBER OF SUBSCRIBERS	TOTAL VIEWS OF UPLOADED VIDEOS
<i>Planeta Official</i>	1,316,486	2,925,830,573
<i>bTV Media Group</i>	103,203	87,773,458
<i>Cartoon Network Bulgaria</i>	69,293	53,541,808
<i>Disney Bulgaria</i>	76,728	47,490,189
<i>Novinite na Nova</i>	40,510	26,051,068
<i>Sportal.bg</i>	7,779	7,821,731
<i>X Factor Bulgaria</i>	78,552	6,643,519
<i>Bulgaria On Air</i>	10,322	5,147,326
<i>HBO Bulgaria</i>	2,736	3,541,117

Source: Socialbakers

⁵⁶ “Anatomy of Fake News”, cit.

⁵⁷ See the platform here: <https://nova.bg/proveri>

⁵⁸ “Anatomy of Fake News”, cit.

TWITTER



Two most prominent media outlets on Twitter are Economedia's Capital and Dnevnik, respectively on the 7th and 8th positions in the overall rating. The third most popular media outlet on Twitter is Investor.bg, primarily reporting on economic and financial topics. As on Facebook and YouTube, profiles of bTV, Sportal.bg and Nova TV, too, are some of the most popular media channels on Twitter.

The loudest tweets

NUMBER OF FOLLOWERS

<i>Capital</i>	140,678
<i>Dnevnik</i>	135,163
<i>Investor.bg</i>	8,993
<i>Webcafe.bg</i>	8,425
<i>bTV</i>	8,266
<i>Sportal.bg</i>	6,722
<i>Nova TV</i>	6,381
<i>Bulgaria on Air</i>	6,084
<i>HBO Bulgaria</i>	3,358
<i>X Factor Bulgaria</i>	3,081

Ranking of the most popular media on Twitter in Bulgaria, June 2018

Source: Socialbakers

FINANCIAL SUPPORT

Google has financially supported Bulgarian journalism through the Digital News Innovation (DNI) Fund, a €150m commitment “open to publishers of all sizes in Europe” to support high-quality journalism. Since its launch in 2015, DNI has awarded €450,000 in funding to journalistic projects in Bulgaria. Recipients included established players such as Media Group Bulgaria Holding, Economedia and Investor Media Group.

In 2017, the Bulgarian news outlet 24 Chasa, owned by Media Group Bulgaria, announced that its project Smart24Chasa would receive €100,000 from Google’s DNI. Since then, there has been no news about the project.

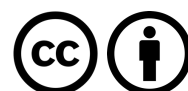
While this funding helps new, innovative projects get off the ground, the financing pumped by Google into the country journalism through this project has no influence in the overall political economy of the Bulgarian media. *(For a map of all main sources of funding in Bulgarian media sector, see Media Influence Matrix: Bulgaria. Funding Journalism)*



Hungary, 1051 Budapest, Oktober 6 str.
number 7, Room 210
Tel: +36 1 327 3000 / 2609
Fax: +36 1 235 6168
E-mail: cmds@ceu.edu
cmds.ceu.edu

Postal address:

Center for Media, Data and Society
Central European University
Nador u. 9
1051 Budapest
Hungary



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