RECENT CHANGES OF THE ROMANIAN MASS MEDIA – A SOCIOLOGICAL VIEW

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Introduction

The first Romanian newspaper was published in 1829, and the press grew relatively fast, to 1090 publications in 1922, and 2300 (118 dailies) in 1936. The first Romanian news agency was established in 1889. The first radio station went on the air in 1928, television was introduced in 1959 (about 600 hours of programming) and the first small-scale illegal cable operations appeared in the late 1980s.

Under communism, all mass media operations became public property. Their output was drastically reduced to make possible a strict control of the Communist Party. The number of media outlets shrank from 56 dailies and 47 radio stations in 1975 to 36 dailies and 9 national and local radio stations in the late 1980s. The two-channel television station that broadcast 4,642 hours of programming in 1975, was limited in 1985 to 22 hours a week on a single channel that reached 90% of the country.

The events of December 1989 exacerbated people's need for information and increasing abruptly the demands for all forms of media. In December 1989 and the months that followed the self-procialimed Free Romanian Television provided round-the-clock news service and „became a veritable experiment in community broadcasting"[1].

The article was intend manly to present a general image of the Romanian mass media system . No statistical hypothesis were formulated but there are some areas of interest mapped in advance.

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[1] P. Gross, *Mass media in revolution and national development: The Romanian laboratory*, Amos Press, 1996, p.35

The topics with investigating were stated as the research questions and they are:

1. What were the changes recorded at the structural and ownership levels of the Romanian media in the last decade?
2. In what way did those changes influenced the relationship of major types of media (e.g. print, private broadcasting and public broadcasting) with the law?
3. How is organised the media industry in Romania at present?
4. What are the main trends in media consumption registered as the result of organisational and economic changes in the field?

Press

Legal basis and historical development

In the last twelve years, no special law regarding the press has been adopted, the Press Law /1974 being abrogated in December 1989. That is why functioning and organising the written mass media in Romania is grounded on the provision in the Constitution that stipulates : «Freedom in the press implies the right to found publications»[2]. «Responsible» for the administration of any kind of property in Romania is the « executive» - the Government – which, in its turn, is responsible for its actions, in front of the «main legislative authority» in the state – the Parliament. Thus, any owner of any publication in Romania has an «indirect» civil responsibility in front of the Parliament. The direct responsibilities are penal (criminal) and are applied to the human individuals in those institutions. Here the state law court judges, according to the Criminal Law, «Code for penal procedure»,[3] in case of violations of fundamental human rights – the articles in the law asking the journalists to comply to the standards of correctness, equilibrium, majority interest and decency of information. There is a «direct penal responsibility» the journalists have in front of law courts and magistrates who can

[2] *** *Constitutia Romaniei*, *** *Monitorul Oficial*, Bucuresti, 1992.

[3] ****Codul Penal*, in ****Buletinul Oficial al R.S.R.*, 1987, p. 390 si p. 400.

sanction the activity of the people working in press institutions in cases of «Calumny» (Art. 205), «Insult» (Art.206) and «Outrage» (Art. 239) through penalties or imprisonment.

Although, in this domain, both politicians and journalists consider as satisfactory the legal provisions in the «Constitution» and in the «Penal Code», several projects for a law regarding the press have been initiated. Between 1990 – 2000 there were registered in Parliament 14 projects for a Press Law; out of these: 5 projects were set up by the journalists' professional organisations, 2 came from the Government of Romania and 6 were initiated by different political parties.

In such conditions, the development of the system of written press, in the last twelve years, started with a series of legal provisions of an economic nature, «the free market of press titles» being in fact the first domain in which phenomena specific to free market economy (privatisation, share-holding, strikes, restructuring, bankruptcy, merging and division) first appeared. If between 1947 – 1990 the most important press proprietor was the State (excepting the Church, cooperation, artists' associations, etc), after 1990 a significant percentage of the written press has become private – the number of publishers (of all kinds, with different types of capital) varied between 1994 – 2000, from 582 to 750, all over the country. Another section consists of the non-commercial publications issued by institutions like the Ministry of Culture and other institutions or departments connected to science, education. Between 1994 – 2000, their average number per year varied from 73 (from a total of 371 in 1994) to 38 (from a total of 360 publications in 2000). The greater diversity of the types of property in the press institutions led to the publishing of 4958 titles between 1990-2000, out of which only 419 had been founded before 1989, the ratio of founding new titles being 454 titles per year[4].

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[4] M. Petcu, *Tipologia presei romanesti*, Ed. Institutul European, Iasi, 2000, p. 143.

Table 1–Evolution of written press: 1989-2000

Indicator	1989	1990	2000
Number of titles according to the Statistics National Commision	495	1444	1550
Number of titles according to the Legal National Deposit	-	-	2003
Number of titles founded (in the respective year)	419	998	234
Titles of newspapers and magazines /1.000 inhabitants according to Statistics National Commision	2.1	6.2	7.8
Titles of newspapers and magazines /1.000 inhabitants according to the Legal National Deposit	1.8	5.1	9
Annual ratio of new publications	-	69	23

A phenomenon that accompanied this «media explosion» was the free access to the profession of journalist; the number of people working in such a press institution reached about 20.000 at present from 2060 according to official statistics in 1989. (According to the Ministry of Labour and Social Protection 58% of these were men and the rest women[5]). In the same interval, the number of people engaged in the occupational statistics class «Publishing-houses, polygraphy and reproduction of recordings on supports», journalists and assimilated professions are included in, has increased from 26.000.000 (in 1990) to 32.0000 ten years later.

Organisation and financing

The «press market» in Romania consists of several elements interrelationed, but differently organised: Raw materials for the production of a newspaper/magazine; Financial resources of different press institutions; Spreading systems; Proprietors of a newspaper/magazine.

Regarding the costs for the raw materials, the price of a kilogram of paper increased between 1990-2000, 815 times

[5]***Comisia Nationala de Statistica, *Documente interne*, Unpublished, 2000.

(under an inflation ratio of 119) and the value of VAT (Value Added Tax) press institutions have to pay to the state budget is 11% from the nominal profit. These facts were reflected by a raise of the price of a publication of 3000 times - for the national dailies and more than 600 times for the national weeklies. Thus, a newspaper costs 15 cents, while a weekly mgazine varies between 17 and 33 cents (the average monthly salary in Romania being under 150 USD).

Press institutions can dispose of two kinds of financial resources: a. Incomes resulting from sells, subscriptions and advertisments; b. State (or other kinds of) subventions. Out of 776 publishers only 6% are members of BRAT (The Romanian Audit Bureau for Printings), so that for only 80 titles the conclusion can be that there is a tendency in Romania to edit between 300,000,000 and 2,000 copies out of which sells and subscriptions represent 90% from the gross production.

As a whole, in 2000, expenses for publicity in written press were 26,550,000 USD, out of which 18,595,500 USD were invested in publicity in daily and weekly publications and 7,969,500 USD for publicity in monthly ones[6]. Regarding VAT in publicity, there is a clear distinction between newspapers and magazines (VAT represents 9%) and publicity (advertising) agencies (18%). A special form of publicity was the paid political one for candidates or parties, as in 2000 there were both local and general elections, but there are no official records regarding possible incomes for the press titles. Subventions came from different sources: the Government, especially for some cultural publications, Foundations and international organisations – Soros Foundation for an Open Society, International Media Fund; other commercial societies (state and private).

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[6] ****Media Expres*, Nr.8, Octombrie 2000, p. 3.

Table 2- Classification of main publications members BRAT after the average gross number of copies and total distributed copies[7]

	Name	Frecquency	Gross– Thousand copies	Distributed- Thousand copies
1	Formula As	Weekly	275,264	258,427
2	Practic in Bucatarie	Monthly	239,537	230,759
3	Adevarul	Daily	194,287	187,089
4	Evenimentul de Weekend	Weekly	179,800	170,297
5	TV Satelit	Bilunar	179,312	172,375
6	Unica	Monthly	135,900	88,720
7	TV Mania	Weekly	127,885	82,640
8	Lumea Femeilor	Monthly	126,400	92,032
9	ProTV Magazin	Weekly	118,883	108,408
10	Avantaje	Monthly	116,424	87,521
70	Monitorul de Braila	Daily	6,435	5,485
71	Monitorul de Botosani	Daily	6,344	5,881
72	Ziarul de Cluj	Daily	6,310	4,577
73	Monitorul de Galati	Daily	6,032	5,298
74	Agenda Zilei	Daily	5,433	5,433
75	Monitorul de Vrancea	Daily	5,356	4,855
76	Hunedoreanul	Weekly	5,116	4,630
77	Monitorul de Vaslui	Daily	3,818	3,283
78	Monitorul de Bacau	Daily	3,656	3,152
79	Monitorul de Neamt	Daily	3,078	2,725
80	Monitorul de Roman	Daily	2,375	2,115

[7] BRAT-*Catalogul Certificatelor de Audit*, Nr.1, 2001, BRAT, Bucuresti, 2000.

Distribution of written press is performed by RODIPET-state autonomous administration organised in 1992 on a network belonging to the General Post and Telecommunication Department as well as by private networks belonging to some publications. The main deficiency of the first system is the charge of 38% collected by RODIPET in order to distribute a title which is found in the final price of the respective publication. Written press is mainly sold in the street – according to a poll in August 2000, 84% of the subjects had not subscribed for any publication.[8].

Regarding the type of property, in 2000, the «written press market» in Romania consisted of four main categories of publications: a. belonging to the state (30%) and the journalists (70%) – joint stock companies; b. edited by private limited liability companies; c. edited by political parties; d. belonging to other kinds of editors. No matter the type of capital involved, in 2000, there were 750 editors and 1189 publishing-houses – their contribution to the «market» being an average of de 2.66 titles/editor and 1.67 titles/publishing-house. The real contribution of the companies on the press market is varied, more than half of them editing just one title and 2% of the total number of newspapers or magazines cannot be attributed to any editor, no mention being available.

Concentration in this domain developed in two peculiar forms: a. association between local editors; b. association between local and foreign editors. Refering to the companies founded on associations between Romanian editors, in 2000, 13 publishing-houses covered 9.5% of the market all over Romania.

[8] Metro Media Transilvania, *Barometrul politic-August 2000*, MMMT, Cluj, 2000, p.26.

Table 3 - Contribution of Romanian publishing -houses to the market

Publishing-house	Number of titles
Nord-Est Medianet	17
Corvin Magazin	16
Elixir Press	15
Omega Press	13
Cassandra	13
Rentrop & Stratton	11
Romanul	11
IBC Hiparion	9
Charta 94	9
Flacara	7
Tribuna economica	7
Telegraf Muntenia	6
Crystal Publishing Group	6

Penetration of multinational companies on the «written press market» in Romania took the form of buying more than 50% of the shares of a press title and after that the new-formed company expanded either by buying new publications or by editing new ones. Such examples are: groups Ringier (owner of eight titles), Bertelsmann (four titles and an advertising agency), Westdeutschland Allgemeine Zeiung (two titles), R&M Software Gmbh (one title), V.N.U. Hearst, LBH Invest International, Heinrich Bauer, Vogel Verlang.

Offers and usage

Total distribution of the written press in Romania, in 2000 was of 2131 titles edited in the capital (having a national distribution), respectively 2827 titles edited on a local and regional scale. Zonal distribution of Romanian press reproduces, generally, the socio-economic development of the counties (judet) and areas, the result being media privileged zones. The group of counties with the most titles –more than 100- cover the central part of Romania (Cluj, Timis, Bihor, Hunedoara, Mures and Brasov) and the counties Iasi, Constanta and Arges, while the least offer covers relatively dispersed zones in the country – South of Moldova (Vaslui and Vrancea), a part of South-West of Romania (Mehedinti and Olt) as well as South-Eastern Muntenia (Buzau and Ialomita). From this point of view, Bucharest is the most significant concentration of edited titles (25 daily publications – out of which 4 in languages of ethnical minorities and 68 periodicals out of which 8 languages of minorities).

Table 4-Number of daily and periodic publications, in historical areas

Area	*Bucu-resti*	*Ba-nat*	*Buco-vina*	*Crisana-Mara-mures*	*Dobro-gea*	*Moldo-va*	*Mun-tenia*	*Olte-nia*	*Trasil-vania*
Number daily publ.	25	4	5	12	4	15	12	11	26
Number periodicals	68	4	6	8	3	22	17	9	22

In the cultural historical areas the most publications are concentrated in Transilvania (905 titles), followed by Moldova (476 titles), Crisana-Maramures (344), Muntenia (315), Banat (238) and Dobrogea (149).

Table 5-Distribution of local and regional press in cultural-historical areas (%)

Banat	Crisana-Maramures	Dobrogea	Moldova	Muntenia	Oltenia	Transilvania
8.4	12	5.2	16.8	11	12.8	32

Out of the total offer of press titles, the most significant part is represented by the monthly publications (20%), followed by the weekly ones (18%) and those with non-precised frequency (17.6%), while the daily publications represented only 4.5% from the titles edited in 2000.

Regarding the «content», in 2000, important differences could be noticed in the distribution of the press titles – if on a national scale the first three positions are taken by the scientific press, the entertainment one and the press of various professions, on a local and regional scale the same positions are taken by general information, cultural and entertainment.

Table 6- A. Distribution of written press on national B. Distribution of local and regional press scale

Type	Number of titles	Percentage	Type	Number of titles	Percentage
Scientific	313	14,7	General information	401	14,1
Entertainment	280	13.1	Cultural	320	11.3
Profesions	197	9.2	Entertainment	242	8.5
Cultural	194	9.1	Scientific	237	8.3
Economy,-finance	151	7	Magazine	227	8.3
General information	131	6.1	Politics	205	7.2
Politics	107	5	Professions	193	6.8
Magazine	90	4.2	Education	183	6.4
Sports	81	3.8	Publicity	135	4.7
Erotics	67	3.2	Confessional	118	4.1
Publicity	63	3	Economy,-finance	99	3.5
Educationt	59	2.8	Sports	79	2.7
Other	59	2.8	Administration-laws	75	2.6
Administration-laws	58	2.7	Military	69	2.4
Military	47	2.2	Other	63	2.2
Confessional	45	2.1	Erotics	52	1.8
Youth	44	2	Youth	51	1.8
Children	41	1.9	Health	32	1.1
Health	36	1.7	Children	26	0.9
Feminist	29	1.4	Home, family	9	0.3
Home, family	19	1	Feminist	6	0.2
TV programmes	19	1	TV programmes	6	0.2

Reading the press is a morning phenomenon (for 41.5% of the subjects living in towns) a copy being read by at most two persons. Still, in 2000 a certain variation can be noticed regarding the «Reading the newspapers and magazines daily on a regular basis» for a representative sample on the national scale from 17.7% in August to 23% in November[9] (A possible explanation of this situation can be the two poll campaigns in April – December 2000, when the public interest in getting information was at its high).

Table 7-Audience of central daily press in urban areas in historical regions. Percentage of the declared readers of the respective title in the region[10]

	Moldova	Muntenia	Dobrogea	Oltenia	Crisana-Maramures	Transilvania	Banat	Bucuresti
Adevarul	18	16	5	11	10	20	2	18
Libertatea	15	18	7	7	5	15	2	31
Evenimentul Zilei	21	16	6	11	8	20	2	19
Ziarul Financiar	24	15	3	8	5	21	4	23
Bursa	20	14	3	8	6	21	3	20
Jurnalul National	23	14	7	11	7	16	3	22
Cotidianul	18	15	6	10	6	18	3	20
National	25	13	7	12	6	13	2	27
Cronica Romana	17	15	4	11	5	17	2	23
ProSport	18	15	6	10	8	21	4	19
Gazeta Sporturilor	22	15	7	10	9	18	4	19
Ziua	20	14	5	11	8	16	3	23
Romania Libera	18	15	7	9	8	17	2	24
Curierul National	22	13	6	11	6	17	2	23

Generally speaking, values on the national scale of «Market

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[9] CURS, *Barometrul de opinie publica-Noiembrie 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000.

[10] ****Profilul cititorilor presei scrise*, Document intern "Curentul", Unpublished, 2000.

Share» for the year 2000 varied for the central press from 16.6% (for the daily "Adevarul") and 10.7% (the daily "Evenimentul Zilei") to 0.1 % ("Transilvania Jurnal", "Cronica Romana" and "Sportul Romanesc")[11]. The most important characteristic of the audience of press titles in Romania was their difference according to the geographical residential area (rural vs. urban). Thus, the «market listing» of local press registered a significant raise especially within the Carpathian arch (Transilvania, Banat, Crisana-Maramures)-more than 50% from the readers. Among the central newspapers, two daily publications of general information –"Adevarul" and "Evenimentul Zilei"- controlled the «market of reading the press» in urban areas.

An important indicator of the «expansion potential» of any publication being the «trust» ratio the respective title has among its readers, statistics show a «recess» of the public confidence in the media offer, on a sample representative for the national scale, only the daily "Adevarul" registered 7.6% readers who declared they trusted "very much" the information presented, while the readers' confidence in the rest of central newspapers was under 5%[12].

Newest developments

It seems the phenomenon of concentration on the market of written press in Romania will reach new aspects – especially under in the form of associations between local editors and foreign national or international ones - H. Bauer, Mondatori (Italia), Bayard Press, Fillipachi Hachette (France) and Bonnie Group (Sweeden) showing interest in the Romanian market[13].

The most important element in order to accurately establish the reality inside the Romanian «written press market» is to find out the exact position on the market of each publication. At present this position has been officially established for most of the newspapers and magazines, only during 2001 there will be issued a study, type «National Readership Survey» initiated by BRAT on a national

[11] IMAS, *Raport de cercetare- AUDIMAS*, IMAS, Bucuresti, 2000.

[12] MMT, CURS, IMAS, *Trei Sondaje-Octombrie 2000*, Unpublished, Bucuresti, 2000.

[13] M. Petcu, *Tipologia presei romanesti*, Ed. Institutul European, Iasi, 2000, p. 103.

sample of more than 12,000 subjects[14]. Thus, there will be possible a more exact determination of the ratio between the «demand» and the «offer» on the Romanian «written press market» - taking into consideration the tendency to overrate the number of readers according to a comparison between the data of a sociological inquiry and those presented by the editors for the publications members of BRAT (so, with a declared circulation).

Table 8-Comparison between the amount of subscriptions in the distribution of some titles members BRAT and the percentage of population who declared they read the respective title (%)[15]

	Subjects – subscribers at....(%)	Subscriptions in the gross production (%)
Adevarul	23	78.10
Evenimentul Zilei	3	8.95
Monitorul	3	14.77
Jurnalul National	3	7.98
Capital	2	35.86
National	2	4.39
Libertatea	2	9.85

Broadcasting

Legal basis and historical development

Until 1992, Romanian broadcasting system had known a marked development in the state sector, predominant at that time on the internal market. Local radio and TV stations had started broadcasts (terrestrial or by cable) before 1992 but the rhythm of founding and <operation» «exploded» between 1993-2000 when, according to the «Law of Broadcasting», C.N.A. licensed more than 3,.000 private operators.

[14] BRAT, *Catalogul Certificatelor de Audit*, Nr.1/2001, Bucuresti, 2001.
[15] BRAT, *Catalogul Certificatelor de Audit*, Nr.1/2000, Bucuresti, 2000 si Metro Media Transilvania,*Barometrul politic-August 2000*, MMMT, Cluj, 2000.

Unlike the written press, broadcasting in Romania is strictly governed by the "Constitution" as well as by some specific laws. The two fundamental laws for the Romanian broadcasting are: «Law of Broadcasting»-adopted in 1992-and «Law regarding the organising and functioning of the Romanian Radio Society and the Romanian Television Society»-adopted in 1994. They both establish the existence of two subjects in fact representing the «state» in its position as main proprietor in the domain of broadcasting: 1. C.N.A. (The National Council for Broadcasting) – initiated as an «autonomous public authority»[16] and functioning under the «direct supervision» of the Parliament of Romania. Its competences are both legal (setting the norms and regulations for all broadcasters, no matter the kind of property) and administrative (the «Hertzian waves» being part of the national patrimony). C.N.A. settles «relations by contracts» with public and private broadcasters renting them (according to a «broadcasting licence») «parts» of the public property. Media »enterprises» - radio and TV stations – have a «civil responsibility» to observe the renting contracts in front of both the C.N.A. and the Parliament . 2. The Romanian Radio Society (S.R.R.) and the Romanian Television Society (S.R.TV.) – appeared when the state Radio television «split up» in two «national public services»[17]. According to the law, they are «autonomous institutions» as against the state powers and society as a whole. At the same time they represent the State and administrate in its name those parts of the Hertzian frequencies which – by law – cannot be «rented» to private stations, being public property. The two «societies» have a «direct civil responsibility» in front of the Parliament of Romania and an «indirect civil responsibility« in front of C. N.A[18] who can settle «fiduciary norms> for the programmes of the two institutions. Because both S. R.R.and S.R.TV function within the same

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[16] *** *Legea Audiovizualului*, Art. 11, in *** Buletin C.N.A., Nr. 1/1992, p. 7.
[17] ****Legea privind organizarea si functionarea Societatii Romane de Radio si a Societatii Romane de Televiziune*, Art. 1, in ***Monitorul Oficial, Nr. 153/1994.
[18] Art. 8 al Legii Audiovizualului, in *** *Buletin C.N.A.*, Nr. 1/1992.

«broadcasting market» they can have «relations by contract» - thus, of «direct civil responsibility»- with the private radio and television stations[19].

Regarding the effective «distribution» of the new radio and TV stations, there are two kinds of distinct evolution in time (taking into consideration the kind of broadcasting support used: Hertzian waves for the terrestrial radio-television and reception by cable):A. A faster evolution – with a relatively equal geographical dispersion in the large and middle towns – for the terrestrial broadcasters; B. A slower rhythm, at first to be found in some urban «centers» and later, in the last two years, penetrated the rural areas and the smaller towns – TV cable stations.

The «traditional» (terrestrial) radio and TV stations passed through two main steps in obtaining the broadcasting licences, which meant a process of «differentiating» from a geographical point of view the «landscape» of the Romanian broadcasting: I. 1993-1996 – when, generally speaking, the territory of the country was «covered», by granting licences to broadcasters located in county capitals and big towns; II. 1996-the present day – characterized by a <regionalizing» the licences for terrestrial broadcasters, accompanied by a «decentralization» of the radio and TV programmes.

As regards the cable broadcasting, there can be identified two main periods in granting such licences: I. The first «time sequence»-1994-1995-when licences were granted especially for the county capitals and the largest towns in the country; II The second period - 1996-2000- when licences were granted for the small towns and the rural areas.

Organisation and financing of broadcasters

Broadcasting in Romania is structured in to main types of property over the fixed assets – public and private – and each sector is

[19] Art. 15., *Legea privind organizarea si functionarea Societatii Romane de Radio si a Societatii Romane de Televiziune*, in ***Monitorul Oficial, Nr. 153/1994.

organized and rules by legal norms, as the distribution system of the radio and TV products («Hertzian waves») is part of the «national patrimony». Public property co-exists with the private one in broadcasting so that the private broadcasters can use only temporarily and under some conditions the frequencies that remain public property. The national broadcasting sub-domain is administrated through a «fiduciary» – C. N.A. – that grants licences to radio and TV broadcasters (public and state)[20]. C.N.A. has, thus, a series of relations «by contracts» with numberless radio-TV enterprises. At the same time, there are parts in this «national patrimony» that belong – by law – to other legal bodies (public radio and television services[21]) and cannot be «subject» of a new contract (national programmes). So, the public radio and television services have a «double» relation with the State (represented by the «fiduciary» C.N.A.): 1. A direct relation towards their own «goods»/patrimony – that can be «given and taken> either to the private station, or used by them[22]; 2. An «indirect», relation, by contract – when asking for a broadcasting «licence» using new frequencies.

In 2000, the «Romanian broadcasting market» consisted of a national radio service, a national television service (both covering the whole territory of the country) and a number of 1075 private broadcasters (cable and terrestrial) that covered 60% of the internal radio market and 50% of the TV one[23] - (the number of private radio and TV stations in use, this year, representing 12.18% of the total of local private broadcasters). From the point of view of their dispersion over the country, there were granted licences for all the 42 counties in Romania. In 2000, the licences for the «traditional» broadcasters represented 29.35% from the total licences for radio broadcasters and

[20] Art. 11 din Legea Audiovizualului, nr. 104/1992, în ***Buletin C.N.A*, nr. 1/1998.

[21] Art. 42 din Legea privind organizarea si functionarea Societatii Române de Radiodifuziune si a Societatii Române de Televiziune, nr. 41/1994, în ****Monitorul Oficial al României*, nr. 153/1994.

[22] Art. 8 din Legea privind organizarea si functionarea Societatii Române de Radiodifuziune si a Societatii Române de Televiziune, nr. 41/1994, in ****Monitorul Oficial al României*, nr. 153/1994.

[23] CNA, *Raportul CNA remis Parlamentului-2000,* CNA, Bucuresti, Unpublished ,2001.

23.02% from those for local TV terrestrial stations (and 13.73% for cable broadcasters).

Table 9- Broadcasting licences for radio, television and cable (terrestrial and sattelite) –January-December 2000[24]

Number	Radio	Television	Cable	Satellite radio	Satellite TV
Licences granted-total	363	234	2392	10	18
Licences granted in 2000	20	17	284	1	4
Licences annulled-total	62	60	752	0	0
Licences annulled in 2000	6	2	114	0	0
Licences in force-total	301	174	1640	10	18
Licences in force in 2000	20	17	284	1	4
Decisions of authority granted-total	239	109	840	9	8
Decisions of authority granted in 2000	36	12	79	2	2
Decisions of authority annulled-total	8	8	114	0	0
Decisions of authority annuled in 2000	0	1	41	0	0
Decisions of authority in force-total	231	101	726	9	8
Decisions of authority in force for 2000	36	12	79	2	2
Licenced societies -total	139	77	599	8	15
Licenced societies for 2000	16	3	86	1	4
Localities with licences-total	116	74	1134	0	0
Localities with licences for 2000	18	16	270	0	0
Localities with decisions of authority-total	92	52	575	0	0
Localities with decisions of authority for 2000	27	12	79	0	0
Counties with licences-total	42	39	42	0	0
Counties with licences for 2000	14	11	38	0	0
Counties with decisions of authority-total	41	37	42	0	0
Counties with decisions of authority for 2000	20	11	35	0	0

[24] CNA, *Raportul CNA remis Parlamentului-2000*, CNA, Bucuresti, Unpublished ,2001.

According to statistics, local private broadcasters offer 43.42% of the population, different radio programmes and 30.37% of the population of Romania, television programmes.

At a general scale, the economic situation of a region is determinant for the development of the broadcasting market. The most counties (19) have between 2 and 5 radio licences, 9 counties have between 6 and 9 licences and 9 counties have between 10 and 18 licences. The same situation can be found regarding the terrestrial television broadcasters in different counties: Hunedoara has 19 licences (8 decisions of authority), Brasov and Mures 10 licences each (respectively 6 and 2 decisions of authority), Arges 8 licences (4 decisions), Bucharest 7 licences (6 decisions) and Prahova 12 licences (5 decisions) and Cluj 9 (6 decisions), are among the counties with the largest number of licences for television broadcasters.

Table 10- Number of radio and TV terrestrial stations in he different historical regions in 2000[25]

Region	Bucuresti	Banat	Bucovina	Crisana	Dobrogea	Maramures	Moldova	Muntenia	Oltenia	Transilvania	Total
Licences/decision radio	18	18	8	15	13	9	38	61	18	119	301
Decisions of authority radio	14	14	7	13	10	7	33	48	13	86	231
Licences/decision TV	7	7	4	4	5	6	18	40	12	78	181
Decisions of authority TV	6	5	1	3	5	3	14	26	9	35	107

After an analysis of the distribution of radio stations in the historical regions, the first place is taken by Transilvania (119 licences – 86 decisions of authority), followed by Muntenia (61 licences – 48 decisions) and Moldova (38 licences – 33 decisions). A number approximately equal of licences have the following regions: Banat (18 licences – 14 decisions), Oltenia (18 licences – 13 decisions), Crisana (15 licences – 13 decisions), Dobrogea (13 licences – 10 decisions). Less

[2525] CNA, *Raportul CNA remis Parlamentului-2000*, CNA, Bucuresti, Unpublished, 2001.

licences can be found in: Maramures (9 licences – 7 decisions), Bucovina (8 licences – 7 decisions). (In Buchaest 14 societies have got decisions of authority for local radio broadcasts). Regarding television, the «hierarchy» of the historical regions is quite similar: Transilvania (78 licences - 35 decisions of authority) is situated on the first place, followed by Muntenia (40 licences - 26 decisions), Moldova (18 licences - 14 decisions), Oltenia (12 licences - 9 decisions). Still, in case of television stations, there is a «discrepancy» in the development of broadcasting, very few licences of TV broadcasting being granted to the regions: Banat (7 licences - 5 decisions), Dobrogea (5 licences - 5 decisions), the last places being taken by Maramures (6 licences - 3 decisions) and Crisana (4 licences - 3 decisions). As regards cable television, a criterion of the geographical «dispersion» is the importance of the locality – in this case, if a town is decreed as «county residence» – the «map» of cable television broadcasters changes in a significant way. There is an important «difference» between two important towns – Bucharest (17 TV cable stations) and Constanta (13) – in comparison with the other county capitals (where, there are no more than 8-9 operators).

Table 11- Hierarchy of regions after the number of radio,TV and cable stations in 2000[26]

Radio			Television			Cable		
Rang	Region	%	Rang	Region	%	Rang	Region	%
I	Center	21.64	I	Center	18.40	I	Center	25.30
II	North-West	16.40	II	South	16.60	II	South	20.20
III	West	13.40	III	Bucuresti	14	III	West	12.80
IV	North-East	11.90	IV	North-Eas	10:50	IV	North-West	10.20
V	South	11.50	IV	North-West	10.50	V	South-Eas	9.20
VI	South-East	10.80	IV	South-Eas	10.50	VI	South-West	9.10
VII	Bucuresti	8.20	V	West	8.70	VII	North-Eas	8.60
VIII	South-West	6	VI	South-West	7.80	VIII	Bucuresti	2.10

[26] CNA, *Raportul CNA remis Parlamentului-2000*, CNA, Bucuresti, Unpublished, 2001.

Private Romanian broadcasting knew in the last years a phenomenon of concentration, under the form of «association in the network» of the local radio and TV stations. In this case, there are two significant facts: the most «stations = network heads» are broadcasters located in Bucharest and have their own local stations (their number varying between 36-in case of the TV broadcaster ProTV-and 2-for the radio broadcasters Uniplus and MixFM) and some local radio and TV stations re-broadcast the programmes of central stations.

Table 12-Situation of local TV stations affiliated in 2000[27]

TV programme network head	Number of stations	Number of affiliated local TV stations	Cable stations broadcasting the programme	
			Terrestrial	Sattelite
Pro TV	36	16	232	589
Antena 1	19	13	262	609
Prima TV	4	0	163	543
Acasa	0	0	0	499
Tele 7 ABC	19	6	172	495
TVR International	0	0	0	301

Table 13-Situation of local radio stations affiliated in 2000

Radio stations network head	Number of own local radio stations	Number of affiliated local radio stations
Contact	11	11
ProFM	13	26
InfoPro	0	8
Mix FM	2	1
Uniplus	2	3

[27] CNA, *Raportul CNA remis Parlamentului-2000*, CNA, Bucuresti, Unpublished, 2001.

The programmes of the two public societies, of radio and television, are taken over by each cable operator – who have constituted a distinct network parallel to the state one. Regarding the public television, in 1990 the national channel II was set in use (with a territorial coverage of 60% compared to 90% for TVR1[28]) and the broadcasting time raised from 22h/week to more than 200h/week in 1992. The state radio had again 6 territorial-regional stations (Cluj; Iasi; Targu Mures; Constanta; Timisoara) and founded or expanded 5 «specialised operators» («Radio Romania International»; «Radio Vacanta»; «Antena Bucurestilor»; «Antena Satelor»; «Radio Constanta Costinesti») which are still in use together with the three programmes with a national coverage[29]. Programme I of SRTV is transmitted through 37 TV translators, covering 97.5% of the national territory, while Programme II of SRTV covers 31.7% of the country, being transmitted through 20 translators[30]. (Programme III of «TVR International» is transmitted through satellite).

Table 14-Number of TV subscriptions/1.000 inhabitants according to the geographical region[31]

Region	North-East	South-East	South	South-West	West	North-West	Center	Bucuresti
Licences/ decisions	137.8	175.4	169.3	157.4	200.5	161.5	193.9	232.2

Financing the Romanian broadcasting system reproduces the distinction «public» vs.«private» property: a. Public radio and television services are financed through subscriptions (whose contribution varies from 13% to 23% in different geographical zones), subventions from the state and advertising; b. Private

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[28] Botnariu, M, *TVR - Scurt istoric*, p. 2, Unpublished, 1993.
[29] Murgu, H, *The Fourth Power: Obstacles to Demonopolising*, in ***Sfera Politicii, No. 12/1993 pp. 20-21.
[30] CNA, *Raportul CNA remis Parlamentului-2000*, CNA, Bucuresti, Unpublished, 2001.
[31] PNUD, *Raportul National al Dezvoltarii Umane*, Bucuresti, 20001, p. 148.

operators in Romanian broadcasting–publicity being the main income source of the society. In 2000 the total income of TV stations from commercial publicity was 234,500,000 USD-representing 67% of the total cost on publicity in media that year[32]-while the income of radio stations from publicity was smaller: only 26.54% of the total amount used by television (62,254,500 USD). (Total income from publicity during the two poll campaigns were not public, so there are no official statistics available).

Programme offers and usage

Regarding the population endowment with radio and TV receptors in the last ten years there are interesting significant data: the degree of household endowment with colour TV sets has raised five times – especially in rural areas, relatively «disadvantaged» before 1989 and the number of radio sets doubled (they outnumber the TV sets).

Table 15-Number of radio and TV subscriptions according to the residential area (%)

Subscriptions TV total	Urban	Rural	Subscriptions radio total	Urban	Rural
16	12.7	18.7	16.5	12.3	20

According to the geographical location of households, the greatest number of TV receptors is found in the West and South of the country, as well as in Bucharest

Table 16-Number of TV subscriptions/1.000 inhabitants after the geographical region

Region	North-East	South-East	South	South-West	West	North-West	Center	Bucuresti
Licence/ decision	137.8	175.4	169.3	157.4	200.5	161.5	193.9	232.2

32 ****Media Expres*, Nr.8, Octombrie 2000, p. 3.

Nevertheless, people living in urban areas are more advantaged as regards the household endowment with new, modern receptors: in 2000, out of the total urban households 58.2% had colour TV sets and 9.9% VCRs compared to 22.2% respectively 2% in rural areas. At the same time, people in the position of «employer» (irrespective the residence), had the best technical access on broadcasting market: 102.5% of the households had colour TV sets and 36.6% VCRs (compared to the unemployed and the pensioners who are at the «minimum» end regarding physical/technical access). Another relatively new phenomenon that appeared after 1990 was that some sub-groups and categories of population bought independent devices for TV reception via satellite – parabolical aerials-in this case a coincidence being observed between the zones with a rich media offer broadcasted by cable (Transilvania and Muntenia) and the endowment with parabolical aerials or joining the CTV network –percentages being double in comparison with the rest of the country.

Table 16- Endowment with TV receptors according to the historical region (%)

Region	Household joined the cable TV or has satellite aerial	Household has color TV	Household has white-blackTV
Transilvania	39	37	35
Muntenia	34	34	36
Moldova	16	16	23
Bucuresti	13	13	6

From the point of view of organising the "programme grid" offered to consumers of broadcasted messages in the case of Romania there also exists the classical differentiation between the «generalistic channels» and «theme channels» [33]. That is why we have taken into

[33] R. Le Champion, *Les chaines publiques Europeenes en question*, in I. Dragan (coord.), *Medias et espaces publics. Approches, acteurs, partiques*, Institutul de Sociologie, Bucuresti, 1994, pp. 91-92.

consideration the TVR1 and TVR2 programmes (public services in Romania) and the following private channels with a national coverage: Antena 1, ProTV, PrimaTV and Acasa. Looking upon the «televisual grid» from the perspective of «the producer of the broadcasted programme>, in 2000, there were two distinctive types of «televisual programmes»: a. televisions produced their own programmes in a significant number – like the two public stations (TVR1 – more than 55% of the total of broadcasted programmes and TVR2 – more than 48%); b. TV stations that broadcasted mostly «imports» - the private TV stations where the production of new programmes was never larger than 45% of the total broadcasted programmes. During the same year, the main external «source» for TV programmes in Romania was the American (USA) offer – more than 63% of the total for ProTV in November or 68.9% for Antena 1 in March 2000. An exception from this point of view is the Acasa station – where the most important place was occupied by the series produced in Latin America – 37.6%. If the audiovisual «offer» of both public and private TV stations is analysed from the point of view of televisual «genres» in 2000, there were two «types» of functional «televisual programming» in Romania: a. A television of «programme» – the case of public television services, where the programmes are framed in well-defined «genres» and are relatively «balanced» distributed in the general «flood» of programmes. b. TV stations of «waves» - where the interference of genres is predominant, as well as a tendency towards «consumerism» by focusing on advertising (as a «standard» borrowed by other TV genres too). These were ProTV, Antena 1, Prima TV and Acasa, where the programming of series was predominant (on ProTV these represent 62% of the total monthly broadcasting period and on Acasa, 68%). (The same TV stations programmed few socio-economic and political or/and cultural programmes).

In August, 52% of the total inquired population, on a national scale, listened to the radio programmes and 74% watched the TV programmes, for a representative national sample.[34]. The audiovisual media consumption varied according to the interviewed person's

[34] CURS, *Barometrul de opinie publica-Noiembrie 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000.

residence (in case of rural residents listening to the radio was preferred 44%- to watching TV-35%[35]) and the location: in the North and center of the country (where in November 2000, 33% declared they «listen to the radio» and 35% «watch TV programmes»[36]) or in a «minimum radio-TV consumption» zone like the East of Romania (percentages being 21%-for the radio and, respectively, 19% -for television[37]). Generally speaking, the «audience rate»-measurable by the indicator «Average Media Reach»-of public and private TV channels varied according to the investigated national «market» vs. urban or national vs. local market (the one in Bucharest, for example). If at the national level the AMR values showed SRTV 1 on the first place regarding the audience on <local market» in urban areas and the capital's area, two private TV stations with national coverage reached the highest values.

Table 17-Market rates of the main TV stations August-September 2000- AMR%[38]

TV station	National	Urban	In Bucharest
ProTV	20.2	24	26.10
Antena1	17.4	21.3	22.10
TVR1	36.7	14.5	17.5
Acasa	6	8.3	8.6
Prima TV	4.2	8.3	5.8
Tele7 ABC	2.5	5	3.5
TVR2	2.7	4.4	2.2
Atomic	1.7	1.9	2.5
Others	8,6	11,3	11,6

[35] Gallup Organisation, *Barometrul de Gen-August 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000.
[36] CURS, *Barometrul de opinie publica-Noiembrie 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000.
[37] CURS, *Barometrul de opinie publica-Noiembrie 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000.
[38] *AGB Data Research*, People Metter, august-septembrie 2000, Unpublished, Bucuresti, 2000.

As regards reception of TV programmes exclusively broadcasted by TV cable societies, the «People Metter»-type values showed a domination of the Bucharest market in 2000, of the Romanian TV station «Acasa» (45.12% for a whole day) followed by the American HBO (17.19%)-so, the «themes» TV stations, addressed to a well-defined <audience-target».

Table 18-Market rates (AMR) in Bucharest of TV cable broadcasted programmes - August-September 2000[39]

Channel	24h	Prime Time
Acasa TV	23,886	55,335
HBO	9,100	17,498
Atomic TV	4,640	6,178
EuroSport	4,097	6,029
Discovery	3,045	3,952
Cartoon	2,377	3,734

Newest developments

The most important phenomena in the development of Romanian broadcasting are «concentrations» of private commercial societies, on one hand, and expansion of broadcasting systems – territorial coverage - for the public radio and television societies, on the other hand. In order to stimulate associations and the forming of a powerful private broadcasting network, 9 licences for satellite broadcasts have been granted (out of a total of 15) and «association in network» between terrestrial and cable broadcasters has been encouraged.[40]. The strategy of developing the coverage of the public radio and TV services was directed towards the increase of the number of locations for the terrestrial broadcasts as well as the retransmission of their programmes by satellite so that become

[39] *AGB Data Research*, People Metter, august-septembrie 2000, Unpublished, Bucuresti, 2000.

[40] CNA, *Raportul CNA remis Parlamentului-2000*, CNA, Bucuresti, 2001, Unpublished.

available to the CTV. In future, the third national TV network will be brought to open competition by CNA, which will ensure a certain «balance» between public vs. private in Romanian broadcasting. As regards the radio, in 1999, the auction for the fourth national, terrestrial relay network has been won by a private commercial society, not by the public radio service.

Online

Unlike the press and broadcasting domains, which are legally regulated and which have permanently been considered as interesting by both private commercial agents and the state institutions, electronic communication «on-line journalism»-remains virtually unknown in Romanian mass media. At present, there are only some «landmarks», extremely general, of the dimensions of this domain and not a complete «diagnosis».

Legal basis, organisation and financing of providers

In Romania there is no law on electronic communication or referring the «electronic signature».. Organising the «on-line» press system follows the structure of written press market as well as the broadcasting network (terrestrial, cable and satellite). The main Internet «providers» are «mixed» commercial societies that offer both «on-line» services and traditional media products.So, financing of «on-line» communication is thus mixed: subscriptions for WWW services and Internet accompanied by a «package» of activities performed by the same company. Among the alternative financing sources, the following can be mentioned: telephony services (the case of societies for mobile telephony like «Connex», «Dialog» or «Cosmorom») or cable TV services (in case of the companies: Zone Vision, FoxKids, Romania Data System).

Basic data on online-offers and online-usage

The newspapers and magazines issued by important editorial groups offer «on-line» editions of the daily press-so there are a total of

45 editors-«providers» of such information. At the same time, the most important radio and terrestrial TV broadcasters (SRTV and SRR as well as the private TV stations ProTV and Antena 1) have visiting sites on WWW.

For the population of Romania, the level of access to the WWW network is extremely low – only 5.1% of the total representative sample declared themselves, in November 2001, as having access to Internet at home or/and at work[41]. The center and the West of the country and the city of Bucharest are the geographical areas with a higher ratio of people having access to a computer network, hence the possibility to recept «on-line» journalism.

Tabel 19-Access to Internet in the household or at work (%)[42]

Transilvania	Muntenia	Moldova	Banat	Crisana-Maramures	Dobrogea	Oltenia	Bucuresti
13	14	17	8	5	13	4	26

Consumption of such kind of messages remains a prevailing urban phenomenon, depending in a decisive degree upon the age and instruction level of the Internet user. In 2000, on the most extended market in Romania, the city of Bucharest, the press on Internet was read especially by young people (18 – 30 years old), male and with higher education.

Table 20-Reading the press on Internet in Bucharest (%)[43]

Gender		Educational level (Last school graduated)		
Men	Women	Professional courses	High School	University
69	31	12	16	72

41 CURS, *Barometrul de opinie publica-Noiembrie 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000

42 CURS, *Barometrul de opinie publica-Noiembrie 2000*, Fundatia Soros pentru o Societate Deschisa, Bucuresti, 2000.

43 ****Media Expres*, Nr.8, Octombrie 2000, pp.12-13.

It is obvious that the development of electronic communication will depend on the increase of household endowment with computers (which in Romania of 2000 remained approximately 26% at a national level) and the decrease of connecting fares, especially those of the«Dial-up» type which undertake successive adjustments of fixed telephones subscriptions.

Conclusions : State of the art of the development of convergence in the Romanian media field

At present, Romania knows a phenomenon of «concentration» of capital market in the media domain, the result being the setting up of «multi-canal» press groups. Among these the most important are: Grupul Intact (the Intact Corporation for Culture and Art- a national network of daily newspapers, own printing house, a TV channel with national coverage, a radio channel and an editing house) and Grupul MediaPro (a mixed capital – Romanian, German and North-American – company that owns a TV network with national coverage, a news agency, proprietor of the Buftea film studios and co-proprietor of several magazines in association with Playboy Enterprises International).

A certain «stabilization» of media market in Romania can be noticed, in the last four years, the «demand» for new publications and the audience of radio and TV programmes did not register significant fluctuations. A possible «expansion» direction is the broadcasting system – especially the future third terrestrial TV channel and the development of CTV systems in small towns and villages-a phenomenon that appeared in the last years. A difficult problem for each media actor and institution is the high production costs and taxes, the rates perceived by the State as well as the decrease of the buying power of the population, which has a direct impact over the «offer» and the diversity of the media products.

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