

Vitosha Research / Sociological Program

2002 Highlights

Vitosha Research carried out 50 social, economic, marketing, media and public opinion projects in 2002. Quantitative and qualitative surveys were conducted, including more than 23,500 face-to-face interviews, 177 in depth interviews and 30 focus groups. The collected information was summarized in over 60 analytical reports, policy papers and newspaper publications.

- In 2002 Vitosha Research continued to systematically expand its scope of activities to cover neighboring and other countries. The Human Security Survey commissioned by the UNDP Regional Bureau in Bratislava and conducted in the Caucasus region (Armenia, Georgia and Azerbaijan) was an important project in this respect.
- Three Eurobarometer Surveys were carried out by a consortium of agencies from EU candidate Central and East European countries. Information about the general attitudes of the Bulgarian public towards EU, as well as public opinion and assessments of the process of European integration in Bulgaria was obtained.
- The results of the second international survey, which is the main component of another round of anti-corruption diagnostics, were presented in April 2002. The corruption monitoring methodology employed provides information about the level of corruption in Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Macedonia, Romania and Yugoslavia. It has become baseline resource for national and international institutions and organizations.
- Vitosha Research conducted two surveys among the general public, one in the business sector and one among public officials as part of the Corruption Monitoring System of *Coalition 2000*.
- The Conflict Vulnerability Assessment study conducted in cooperation with the Conflict Management Group included analysis of the social and political risk over the period 1989-2001. The main objective of the assessment was to identify current and potential sources of conflict and instability in the country.
- In 2002 Vitosha Research completed the project "Assessment of the Progress Made by Bulgaria towards Sustainable Development in the Context of the RIO+10 Process". A comprehensive analytical report, it outlines the main achievements, challenges and recommendations for the future progress of the Rio+10 process in Bulgaria.

I. Social and Economic Research

The main thematic issues of the implemented social and economic research projects included the assessment of the existing and potential conflicts in Bulgaria, the coping mechanisms of elderly pensioners throughout Bulgaria, crime victimization, regulatory and administrative costs for the private sector firms and others. In the course of the work on these projects, some of them commissioned by the Councils of Ministers, World Bank, UNDP, USAID, American Red Cross and Open Society Foundation, Vitosha Research conducted over 4300 face-to-face interviews, 15 focus groups and 177 in-depth interviews with Members of Parliament, ministry and state agency officials, representatives of municipal administrations, businessmen, academics, NGO leaders and journalists.

1. Conflict Vulnerability Assessment

The survey was part of the efforts of the USAID/Bulgaria to track the past, present and potential future conflicts in Bulgaria, the regional dimensions of conflict vulnerability, to identify the key conflict players and at-risk groups, and to determine the root causes and immediate factors of the conflicts. The study was based on more than 50 in-depth interviews. The interviews included wide range of respondents, dispersed geographically throughout Bulgaria – political leaders and Members of Parliament, national and local government officials, representatives of labor organizations, members of the Turkish, Roma and Pomak communities, representatives of civil society institutions (NGOs), journalists, business associations and trade unions. The study concluded that Bulgaria was unlikely to suffer the kind of ethno-political conflict that had been experienced by some of its

neighbors, even if tensions should increase again in neighboring countries. Still some important causes of conflict vulnerability could be identified - increasing stratification of society, increased marginalization and ghettoization of a significant minority population, low level of public trust in state institutions and political parties, limited capacity for conflict management, etc. None of these causes is in itself sufficient to produce conflict, but together they create a volatile situation ripe for escalation through activities of “conflict agents” or trigger events.

2. Assessment of Sustainable Development Initiatives in Bulgaria

The project on Assessment of Sustainable Development Initiatives in Bulgaria was commissioned by UNDP Capacity 21 Program. The main task of the project was to make an in-depth analysis of the country’s progress towards sustainable development in the context of the Rio+10 process. The approach adopted in assessing Bulgaria’s progress towards sustainable development involved the use of various quantitative and qualitative methods targeting a number of different institutions, organizations and communities. The qualitative survey comprised 50 in-depth interviews with representatives of the following target groups: ministry officials, representatives of the district administrations of Lovech and Veliko Turnovo Districts, and of the municipal administrations in Velingrad, Asenovgrad, Teteven, Svishtov, Elena and Lyaskovets Municipalities, NGO representatives and business persons.

A quantitative survey was also conducted among participants in the pilot projects of Capacity 21 Program in the municipalities of Velingrad and Svishtov. Content analysis was made of existing sources of information concerning the evolution of the Rio+10 process

in Bulgaria – publications, research projects and studies, sector-specific laws, documents, strategies, programs and plans related to sustainable development on the national, regional, and local levels.

In the context of the global problems sustainable development is facing specific challenges in Bulgaria. Among them are the gaps in the national legislation with a bearing to sustainable development; lack of comprehensive institutional regulation of the process of sustainable development and of a steady-fast policy in this direction; the coordination of the overall process of sustainable development and synchronization of the policies, programs and projects in various spheres have been inadequate. The following characteristics of the process of Sustainable Development could be identified:

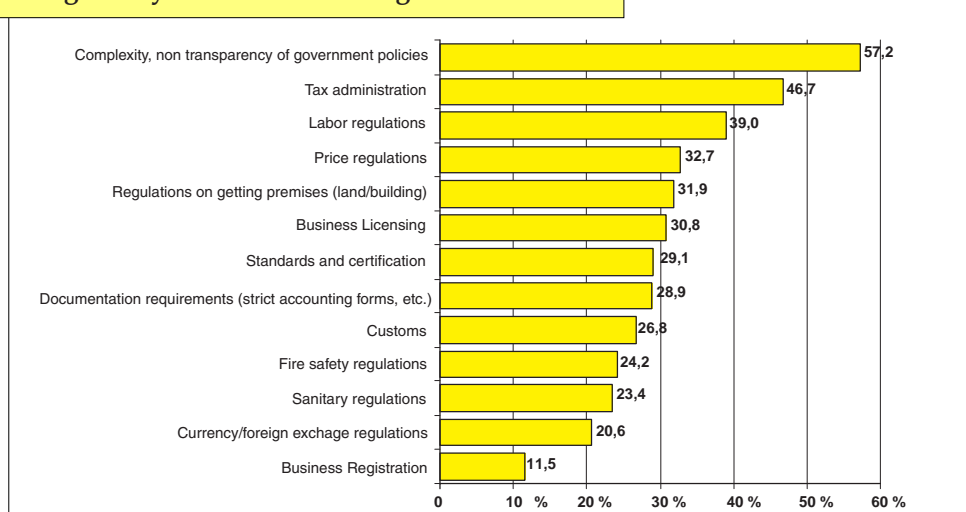
- The National Plan for Regional Development (NPRD) is becoming the basic instrument for the creation of a comprehensive long-term regional development policy based on a balance of national, regional, and local interests and priorities.

- The sustainable development concept is gaining increasing recognition, not only on the part of the political constituency and public administration, but also among members of the academic community and representatives of non-governmental organizations and business.
- Several hundred Sustainable Development related projects have already been implemented in the country at the national, regional and local levels, and involvement of civil society has been growing.

3. Regulatory Framework and Policy Improvement: Regulatory and Administrative Costs Survey

This project was commissioned by Council of Ministers and was aimed at evaluating the impact of the state requirements, procedures and institutional arrangements of private firms. The target groups of the survey were owners, managers and chief executive officers of companies. The information collected made it possible to draw conclusions

Regulatory Constraints to Bulgarian Business



about the main problems faced by the business sector in Bulgaria (including certification of goods and services, obtaining of licenses, inspections, etc.).

4. Coping Mechanisms of Elderly Pensioners in Bulgaria

The survey on the Bulgarian Elderly Pensioner Program was carried out by Vitosha Research in cooperation with the American Red Cross and the Bulgarian Red Cross. The results of both the quantitative and the qualitative surveys (the latter was carried out in six regions – Pazardjik, Lovech, Dobrich, Stara Zagora and Shoumen – through focus groups discussions and in-depth interviews) delineated the basic problems and needs of pensioners over 65 with low personal income. Public officials, local NGO leaders, business persons, journalists and the pensioners themselves gave their opinion and recommendations for finding out the most appropriate and preferred models of assistance.

Regarding the main needs of pensioners, several types of models of assistance were pointed out as more appropriate:

- For satisfying the pensioners' needs for more and better food, forms of assistance such as pensioners' store, social patronage, and delivery of food supplies are more or less positively evaluated.
- The preferred models with respect to pensioners' needs for better health care services and supply of necessary medicine are: rehabilitation centers, health rooms, free medicines and provision of free medical services at home, and special medical care for disabled people and people suffering from chronic diseases.
- The preferred models of assistance in relation to pensioners' limited financial capacity for satisfying their daily wants: delivery of certain amount of money or partial coverage of pensioners' bills for electricity, heating, and water, as well as the provision of cheaper services for household repairs and maintenance. The social assistance benefits, provided by the social assistance services are considered insufficient by the pensioners.
- As a whole, the preferred model for responding to pensioners' cultural and information needs is the conducting of various organized cultural events such as: attendance at theater plays and movies, celebration of various holidays, organizations of lectures and discussions, which create the opportunity for the maintenance and widening of pensioners' social contacts and the realization of more interaction.

5. Human Security in the Countries of the Caucasus - Armenia, Azerbaijan, and Georgia

As a part of the UNDP Human Security project in the Caucasus Region, a set of qualitative social studies were undertaken in the region of South Caucasus (Armenia, Azerbaijan and Georgia). The study was commissioned by the UNDP Regional Bureau in Bratislava and aimed at gauging public attitudes towards terrorism in general and its specific manifestations after September 11. It also assessed the evolution of specific threats against human security in the post 9/11 environment. Qualitative research methods (focus-group discussions and in-depth interviews) were used to evaluate the basic elements of human security (economic security, food security, health security, environ-

mental security, personal and public, and political security) in the three countries.

The study showed that for all the countries in the Caucasus region human security problems have a clear economic background, and produce serious anxiety about the future of national identity and statehood in general. In all three countries the level of political security and public trust in institutions is low. This has been one of the important effects of both the high level of confrontation and tension in the region, and the ineffective policies adopted by the state and the political elites.

6. Early Warning System in Bulgaria

The project coordinated by UNDP includes monthly publications of Early Warning Reports (EWR). The main objective of the reports, which have been published since 1997, is to explore the dynamics of the overall economic, social, political, religious and ethnic environment in Bulgaria, to anticipate and respond to crisis situation before they become too violent or before their effects became irreversible. Early Warning Reports provide information and early warning signals for possible adverse effects. Work on this project is based on the cooperation of analysts in the Development of International Relations Association, BBSS and Club Ekonomika 2000. CSD is responsible for four of the seven sections of the report. In 2002 two Early Warning Reports were published.

7. Social Evaluation of the "Integrated Development of the Pernik Region" Micro-Projects

In order to evaluate the social impact of the Pernik Pilot Project, which constitu-

tes a part of the Employment Project in the regions with steel-producing and mining industries a combination of quantitative and qualitative methods were used.

On the basis of the assessment it was concluded that the micro-projects had been well accepted by citizens of the Pernik Region. Providing objective economic, technical, organizational and social evaluations of the completed projects is considered necessary as it contributes to the design and implementation of similar projects in the future.

8. International Crime Victimization Survey

International Crime Victimization Survey, commissioned by Open Society Foundation, was conducted by Vitosha Research, using a methodology, developed by United Nations International Crime and Justice Research Institute (UNICRI). The main goal of the survey was to collect information from the victims about the different crimes, their frequency and the assistance rendered by the police, NGOs, etc.

II. Corruption Surveys

1. Corruption Monitoring System of *Coalition 2000*

Vitosha Research has been extensively involved in conducting the surveys of the Corruption Monitoring System (CMS) of *Coalition 2000*. CMS includes a comprehensive set of qualitative and quantitative techniques for different target groups (general public, business people, public officials, professionals, etc.). In 2002 two quantitative surveys of general public, two surveys of the busi-

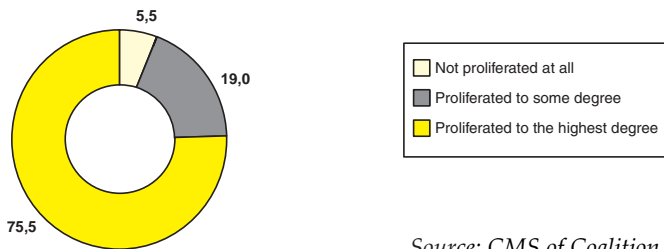
ness sector and one survey with public officials were conducted. This made it possible to estimate the dynamics of the level of corruption in the country and analyze the corruption related attitudes.

CMS results were summarized in the Corruption Indexes of *Coalition 2000* and published three times in 2002 (February, June and November).

2. Regional Corruption Monitoring

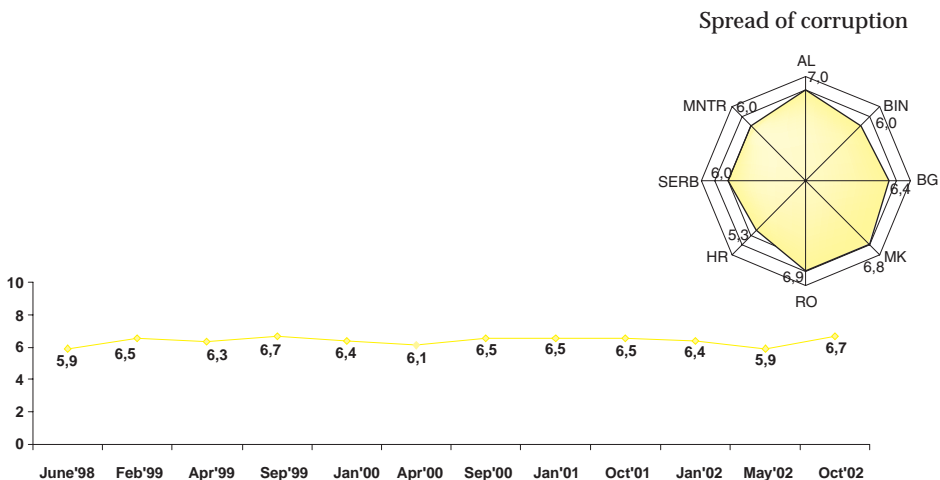
The second round of Regional Corruption Monitoring System was based on the methodology of the Corruption Monitoring System of *Coalition 2000*. The main goal of the analysis is to demonstrate the relative public importance of corruption and the level of proliferation of corrupt practices in various social structures, institutions and groups. The

Spread of Corruption in the Judiciary (general public; %)



Source: CMS of Coalition 2000, October 2002

Spread of Corruption*: Bulgaria 1998-2002, Southeast Europe, January 2002 (general public; %)



Source: CMS of Coalition 2000; SELDI

* Note: the maximum value of the index is 10.0 - it indicates the highest possible level of corruption. The minimum value is 0,0 - it indicates an absence of corruption.

Legend: AL - Albania; BIH - Bosnia and Herzegovina; BG - Bulgaria; MK - Macedonia; RO - Romania; HR - Croatia; SERB - Serbia; MNTR - Montenegro.

information gathered allows for comparisons between individual countries and makes it possible to track the evolution of corrupt behavior.

The Spread of Corruption index summarizes assessments of the spread of corrupt practices among public sector employees. The evolution of the index values displays several notable characteristics. In general, its values in all of the countries surveyed are the highest compared to the other corruption indexes, which is a tendency carrying on from 2001. In comparative terms, the most notable changes have been registered for Macedonia, where assessments of the spread of corruption have sharply increased. At the same time in Serbia, Croatia and Romania there has been a noticeable change in a favorable direction. In Bulgaria the assessments of the spread of corruption remained almost unchanged.

3. Corruption in Small and Medium-sized Enterprises

In cooperation with Integra, Slovakia, Vitosha Research completed a project on Corruption in Small and Medium-sized Enterprises. The survey was conducted among entrepreneurs and managers of 642 small and medium-sized companies.

The majority of business people recognized many forms of abuse of power, which they identify as corruption in addition to some traditional forms as giving bribes in different forms. SME managers consider the lack of administrative control and the dysfunctionality of the judiciary among the most important factors facilitating the spread of corruption in the country. According to the participants in the survey, the most efficient strategies to curb corruption include, on the one hand, timely and well-ordered government measures and

legal regulations, and on the other hand, the development of alternative anticorruption agencies/actors, e.g. as civil society anticorruption organizations, wide media publicity, etc.

III. IT Projects

Vitosha Research has continued to monitor the IT penetration and information society development in Bulgaria. Special attention has been devoted to PCs and Internet usage and their role in the everyday life of Bulgarians. In 2002 several projects were carried out and the data collected made it possible to produce regular assessments of the current status of ICTs.

1. Monitoring of Information Technologies in Bulgaria

Vitosha Research has been monitoring the penetration of new information technologies in Bulgarians' everyday life since 2000. The purpose is to systematically assess the use of PCs and the Internet by Bulgarian citizens. Three main indicators have been monitored: computer access, Internet use and structure of Internet use. The main findings include:

- Although the relative share of people with PC access has increased, the level of IT penetration in Bulgarians' everyday life can be evaluated as relatively low. As of October 2002 the approximate number of PC users aged 18 and above are about 1,050,000 (16.3% of the adult population).
- The people with higher education constitute the largest group among those having computer access. The highest level of PC usage is observed among the 18-40 age group.

- Although Internet use has generally been on the rise the share of users among the Bulgarian population remains relatively low.
- The typical Internet users visit the virtual space at least once a week.
- The three main purposes for Internet users to access the World Wide Web are the following: as a source of information, for entertainment, and for business and education. At the same time services like financial transactions and online shopping are still rarely used.

The specific goals of the project are:

- Assessment of the general Internet habits of the users;
- Identification of the main problems related to Internet usage;
- Positioning of Internet among the contemporary forms of communication;
- Description of the Internet users' profile;
- Probing the Internet users' attitudes towards participation in future surveys conducted via Internet.

2. On-line Survey on the Internet Use

Vitosha Research and Bulgaria Online developed a pilot project for an Internet survey. The basic methodological purpose of the survey was to test different options and techniques for conducting online studies via Internet. The pilot-project target group covers the registered users of the News and Media information data-base of Bulgaria Online.

Survey results show some essential problems that inhibit the level of Internet use in Bulgaria: the necessity to achieve better value-for-money services in terms of connection speed and connection reliability, the need to improve security and e-mail protection. More than half of the respondents think spam e-mail should be reduced through enforcement of new regulations.

Frequency of Internet Use (%)

	<i>April 2000</i>	<i>September 2000</i>	<i>June 2001</i>	<i>October 2001</i>	<i>May 2002</i>	<i>October 2002</i>
Several times a day	0,4	0,9	0,9	1,4	1,3	1,9
At least once a day	1,0	1,4	2,5	1,8	1,4	2,5
At least once a week	2,2	1,6	3,2	3,8	3,8	2,9
At least once a month	0,9	0,8	1,0	1,1	0,8	1,2
Less often	1,0	2,1	0,7	2,3	1,6	1,5
Total	5,5	6,8	8,3	10,4	8,9	10,0
<i>Source: Vitosha Research Quarterly Omnibus (2000 - 2002)</i>						

IV. Public Opinion, Media and Market Research

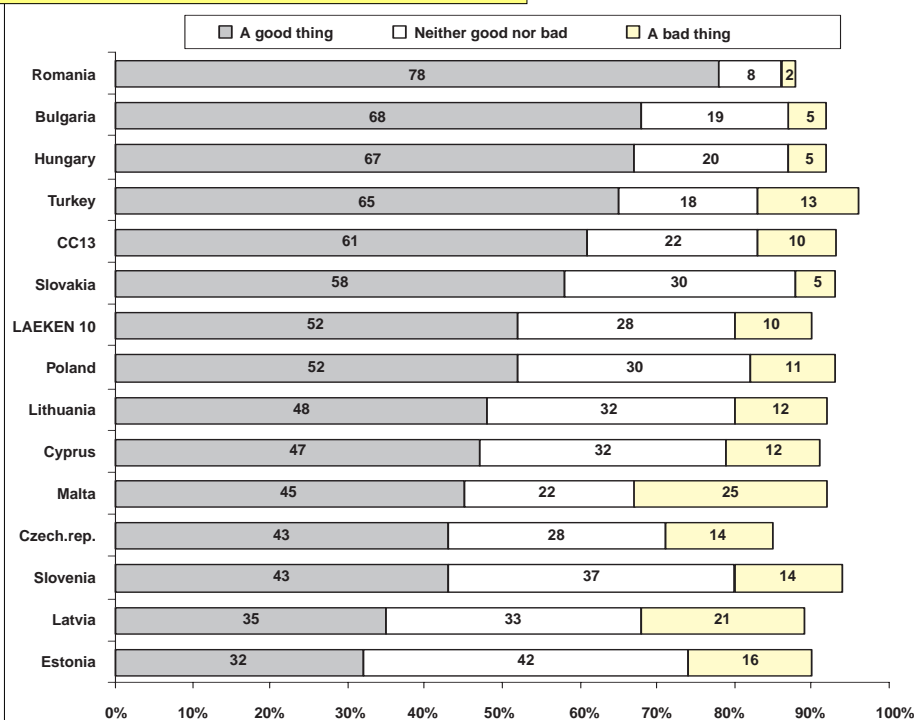
Ten public opinion research projects were implemented in 2001. The basic topics of the studies were: public opinion about politics and economy, attitudes towards the European Union, NATO and US policy against terrorism, the health reform in Bulgaria, etc. The projects were commissioned by the Office of Research, US Department of State, Gallup Hunga-ry, the Democracy Network Program, the

National Health Insurance Fund, Barents Group of KPMG Consulting, and the International Institute for Democracy and Electoral Assistance.

1. Eurobarometer

Vitosha Research, as a part of a consortium of research institutions from Central and Eastern Europe, has continued the implementation of the Eurobarometer survey. The survey is launched by

Support for EU Membership



Source: Candidate Countries Eurobarometer 2002.2, Public Opinion in the 13 Candidate Countries for European Union Membership, First Results, November 2002, European Commission The Eurobarometer Website: http://europa.eu.int/comm/public_opinion

CC13 - Candidate countries as a whole

LAEKEN 10 – “Laeken group” includes 10 countries which were invited in December 2002 to join the EU by 2004 (Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia)

Question: Generally speaking, do you think that (COUNTRY)’s membership of the European Union would be...?

(% “Don’t know” and “No answer” not shown)

the European Commission in 13 EU candidate countries and is coordinated by Gallup Hungary. Gathering information about societies that will become members of the European Union, the Commission is able to provide decision makers and the European public with opinion data that help understand similarities and differences between the EU and the candidate countries. The Eurobarometer continuously tracks the support for EU membership and the change of attitudes related to European issues in the candidate countries. In 2002 three surveys were carried out. The project aims at monitoring general attitudes towards the EU membership, public expectations of changes of living standards, and assessments of the process of European integration of Bulgaria.

More than 6 people out of 10 in the candidate countries (61 %) consider their country's membership of the EU as a "good thing" (2 percentage points more than last year). Across all 13 candidate countries the level of support observed has not risen significantly. However, opposition has fallen compared to the Spring 2002 survey. These favorable results are even more striking in the 10 countries which in December 2002 were invited to become EU members, where the number of people who are against their country's membership records a drop of about 20 percentage points within one year.

The latest wave of the Eurobarometer showed that the highest level of support for EU membership has been registered in Romania, Bulgaria, Hungary and Turkey.

2. Public Opinion on Administrative Services in Bulgaria

The project, commissioned by KPMG,

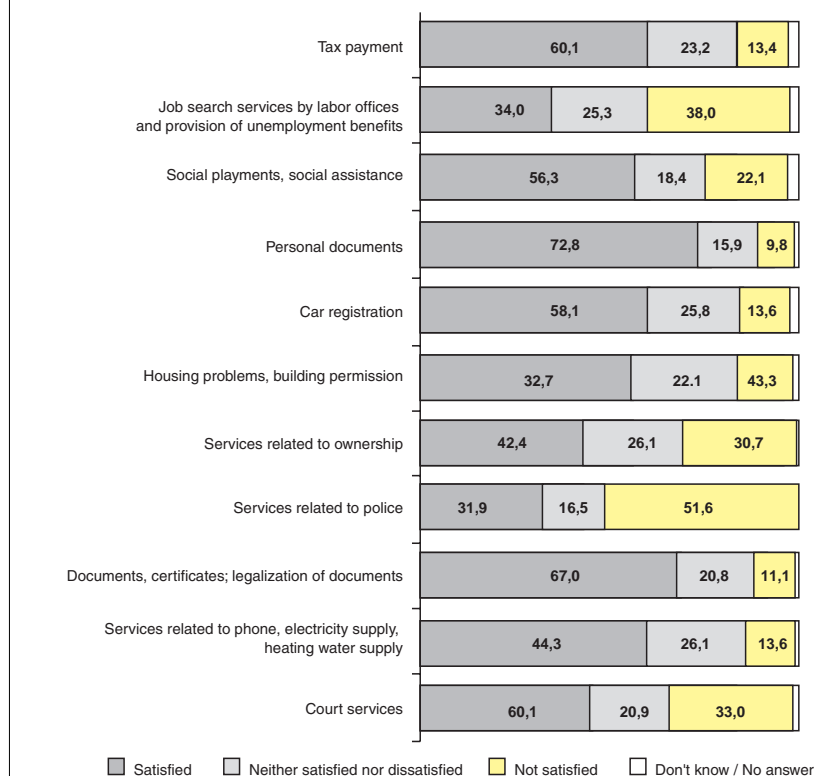
aimed to gauge citizens' satisfaction with administrative services in Bulgaria, and to obtain assessments and recommendations on the current administrative system in the country.

The survey results show that positive assessments prevail for the administrative services provided to citizens and companies. The share of unsatisfied clients exceeds that of satisfied clients in services related to: 1) police (e.g. in case of theft, complaints, check-ups, etc.); 2) housing problems, applications for building permissions and job search services and 3) provision of unemployment benefits by Labor Offices. Along with many objective reasons for not receiving administrative services that citizens and firms are entitled to (such as the high cost of the services, too much bureaucracy, lack of financial resources from the budget, delay of payments, unclear requirements, etc.) the negligence and unconcerned attitude of the public officials towards the clients and towards their own administrative duties was highlighted as a very important subjective reason. The main recommendation for the improvement of service delivery at the local, regional and national level is to impose stricter control and penalties for malperformance of officials.

3. Media Research

Media studies focused on the evaluation of Radio Free Europe, Deutsche Welle, BBC and Voice of America programming. A total of one quantitative, two qualitative studies, two radio monitoring projects, one assessment of radio advertisements and three waves of assessment of music fragments were conducted. Most of these projects were commissioned by the InterMedia Survey Institute and Radio Vitosha – Bulgaria and aimed at assessing:

Citizens' Satisfaction with Administrative Services (%)*



(*) Base – the respondents who have received the respective administrative service

4. Market Research

- Trust of the Bulgarian public in mass media;
 - Attitudes towards international and domestic TV, and radio channels;
 - Role, image and relevance of international and domestic radio broadcasters in Bulgaria;
 - Opinions and attitudes of Bulgarian listeners towards the programs of the RFE, DW, BBC and VOA.
- Vitosha Research also conducted eight quantitative market surveys in 2002. The main topics of the studies were:
- Pharmaceutical market segmentation;
 - Alcoholic drink consumption and brand tracking;
 - Use and attitudes towards the consumption of goods at OMV petrol stations.

V. Publications

Research findings have been widely disseminated in the press. More than 20 articles and survey analyses were published in newspapers with national circulation. About 40 analytical reports and policy papers were prepared by Vitosha Research experts. Some of the more important reports are:

- Assessment of the Progress Made by Bulgaria towards Sustainable Development in the Context of the RIO+10 Process, January 2002.
- Developing Philanthropy in Bulgaria: Strategic and Sustainable Partnership with NGOs, January 2002.
- E-readiness assessment of Bulgaria, January 2002.
- Corruption Indexes, Regional Corruption Monitoring in Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Macedonia, Romania, and Yugoslavia, April 2002.
- Social Evaluation of the Micro-projects Fulfilled under the "Integrated Development of the Pernik Region" Project, February 2002.
- Conflict Vulnerability Assessment, April 2002
- Regulatory Framework and Policy Improvements: Regulatory and Administrative Costs survey, April 2002.
- Human Security in Armenia, Azerbaijan and Georgia Following the Events of 11 September 2001, April 2002
- Bulgarian Elderly Pensioner Program Survey, May 2002
- Public opinion on the economic and social policy of the Bulgarian government, June 2002.
- Public opinion on administrative services delivery, June 2002
- Corruption in Small and Medium-Sized Enterprises, August 2002
- Corruption Indexes of *Coalition 2000*, November 2002.