

NEW BULGARIAN UNIVERSITY

Department of Music

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**DEVELOPMENT OF SYMPHONY ORCHESTRAS IN BULGARIA. HISTORY,
CURRENT ISSUES AND PROPOSED SOLUTIONS**

Abstract of a dissertation

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TABLE OF CONTENTS of the dissertation

INTRODUCTION	5
CHAPTER ONE: THEORETICAL FORMULATIONS OF THE SYMPHONY ORCHESTRA PROBLEM	9
1.1. The nature of the orchestra and types according to the ensemble	9
1.2. Orchestras, according to the act of creation	17
1.3. Types of orchestras according to their operational objectives	19
1.4. Property of the orchestra - participation of the orchestra members	24
1.5. Relationship between " <i>institutions</i> " orchestra and hall	28
1.6. Significance and influence on the status of music ensembles of of the terminological categories ' <i>philharmonic orchestra</i> ' and ' <i>symphony orchestra</i> '	33
Conclusions of the first chapter	42

CHAPTER TWO: ANALYSIS OF FACTORS INFLUENCING THE PERFORMANCE RESULTS OF SYMPHONY ORCHESTRAS IN BULGARIA	43
2.1. Musical orchestras in Bulgaria - "philharmonic" or "symphony orchestra"	43
2.2. Stages of development of musical (symphonic) institutions in Bulgaria	50
2.3. The process of cultural reforms in the performing arts in Bulgaria	74
2.4. Analysis of the reforms carried out over the last 30 years in the professional music sector	76
Conclusions of the second chapter	120
CHAPTER THREE: TESTING A MODEL FOR THE IMPORTANCE OF STRATEGY AS AN INFLUENTIAL FACTOR ON THE PERFORMANCE OF SOFIA PHILHARMONIC ORCHESTRA	122
3.1. History of the Sofia Philharmonic	122
3.2. Status of the management of Sofia Philharmonic Orchestra (as of 1 January 2020)	125
3.3 SWAT analysis of the state of the Sofia Philharmonic (as of 31 December 2022)	130
3.4. Development strategy of the Sofia Philharmonic	132
3.5. Concert planning and implementation at the Sofia Philharmonic	140
Conclusions of the third chapter	144
CHAPTER FOUR: IMPLEMENTATION OF ORGANISATIONAL CHANGE THROUGH IMPROVED SYMPHONY ORCHESTRA MANAGEMENT	146
4.1. Symphony Orchestra Management	146
4.2 Politics of orchestras - <i>cultural industry</i> or <i>social activity</i>	155
4.3. Reason for the existence of orchestras - the audience	171

4.4. Choice of repertoire and performers and the identity of the symphony orchestra	179
4.5. Legislative framework for the management of the performing arts in Bulgaria	185
4.6 Funding of cultural institutions: private; mixed or public	192
4.7. Possible solutions to the problem of working hours of staff in symphony Orchestras	211
4.8. Wages of musicians in a symphony orchestra	227
4.9. Evaluation criteria for symphony orchestra employees	231
SUMMARIES AND RECOMMENDATIONS TO THE OBJECT OF THE STUDY .	238
CONCLUSION	243
CONTRIBUTIONS OF THE DISSERTATION	246
DISSERTATION PUBLICATIONS	247
BIBLIOGRAPHY AND SITEOGRAPHY	248
APPENDICES	259
Appendix No. 1: Newspaper Rabotnichesko delo March 1945: The article "State Symphony Orchestra" by Stoyan G. Stoyanov	259
Appendix No. 2: Interview with the conductor Veselin Baichev (27.01.2022)	261
Appendix № 3. Plamen Djurov - conductor (01.09.2021)	265
Appendix № 4: INTERVIEW with conductor Vladimir Kiradjiev (15.01.2022)	274
Appendix № 5: INTERVIEW with musicologist Andrey Andreev (05.08.2022)	280
Appendix № 6: Communication strategy of the Sofia Philharmonic (2022)	285
Appendix No. 7: Detailed description of the Symphony Orchestras' ensembles in Bulgaria .	292
Appendix No. 8: RULES OF ORDER for the structure and activities of Sofia Philharmonic Orchestra (dated 23.11.2018, signed by Minister Boil Banov)	301

INTRODUCTION

One of the most complex systems in the socio-cultural sphere is that of music. The complexity stems from the diverse forms of music performing genres, the relationships and interactions between the different components of the system - commercial and non-commercial, economic and administrative, aesthetic and ethical.

Many of the so-called "*socio-cultural countries*" place the satisfaction of society's need for cultural communication at the centre of their socio-economic policies. Culture includes management, financing and provision of services aimed at improving an individual's self-awareness and understanding of the others' attitudes.

The initial aim of this paper is to describe the state of Bulgarian symphony scene and, based on the experience of Sofia Philharmonic Orchestra, to provide guidelines for creating a strategy for the development of a symphony orchestra. The author's aim is to present a more complete picture of the classical symphony orchestra, based also on the differences between orchestras according to different criteria. By showing variations of existence, the desire to reveal the deep diversity in history and the evolution of a structure perceived one-sidedly by society is strengthened. The main idea remains the same - **to present the development of the symphony orchestra from the Liberation to the present day as part of the performing arts and to show the possible paths of its evolution as a musical and public apparatus, by creating a strategy for its development, using the experience of various professionals in the field, but also that of the national orchestra of Bulgaria - the Sofia Philharmonic.**

Relevance of the topic

In Bulgaria, there is no historical overview of symphony orchestras proposed so far. There are works on opera theatres, on composers as authors of artistic works, but there is a lack of specialised literature and research on the history and development of symphony orchestras. The very notion of "symphony orchestra" is too simplistic in people's minds. Due to the changes in the political governance of the country in the last 30+ years, there is a lack of information - in terms of facts and sources - archival documents have been

destroyed or are unavailable for scholarly and research purposes. On the other hand, a number of attempts have been made in recent years to reform the sector without prior analysis of the factors influencing the performance of symphony orchestras in Bulgaria. No different models have been tested to establish the importance of strategy as an influencing factor on the performance of symphony orchestras and to assess which form of management is most appropriate for Bulgaria. These arguments, combined with personal need and interest, have led to pursuing this thesis.

The research object is the history and current state of the Sofia Philharmonic Orchestra, as well as the history of orchestral practice in Bulgaria. All this is refracted through the prism of the best world practices.

The subject of research is the methodological and applied aspects of the identification of opportunities to improve the products of the work of musicians, orchestra members, managers, soloists and group leaders, by enhancing their motivational and socio-cultural engagement with the institution of which they are an integral and harmonious part.

The aim of this dissertation is to illuminate the history and hence establish the current situation of symphony orchestras in Bulgaria, focusing primarily on the state of Sofia Philharmonic Orchestra. To borrow some innovative aspects and organisational practices of the best European and world philharmonic structures and to try to implant them in Bulgarian cultural environment in order to bring about organisational change by improving the management of symphony orchestras.

In order to achieve the objective thus formulated, **the following tasks** are set out:

1. To establish a theoretical basis for the structure and management of symphony orchestras.
2. To provide historical insight into the origin and development of orchestral art in Bulgaria.
3. To analytically study the state of orchestras and the progress of musical (symphonic) institutions in Bulgaria.
4. To critically examine the cultural reforms of performing arts in Bulgaria.

5. To present and analyse the structure and management of Sofia Philharmonic Orchestra (as of 1 January 2020).
6. To approbate the strategy model as an influencing factor on the importance of symphony orchestras' performance results to be part of the cultural industry and to have social impact.
7. To analyse the legislative framework for performing arts management in Bulgaria.
8. To present integrated criteria for the evaluation of the symphony orchestra in the country, from which to derive the ways of its financing and management as a cultural institution.

Research thesis of the dissertation

The work of a philharmonic musician has a dual character - firstly it is a personal resource and at the same time the capital of the organisation that is interested in developing it. An orchestra player or soloist achieves three types of results-musical, economic and socio-cultural – as he carries out his activities in an organisation where the results are also measured in these three areas. Organisational strategy is a major influencing factor on the performance outcomes of symphony orchestras to be part of the cultural industry and to have a public and social outreach. Despite the multifaceted and complex nature of the work of a philharmonic musician, it is subject to management, and its results can be significantly improved through the application of appropriate methodological tools for training and for developing its capabilities for individual, and thus organisational, change.

Research approach and methodology in the dissertation

The methods of historical analysis and synthesis, comparative method, survey of opinions and evaluations, social experiment, etc. were used for the realisation of the research. The approach is analytical - facts about orchestras in Bulgaria and abroad are studied and collected. The methods are of comparison and historiographic justification of the collected overall information. Futuristic elements have been applied to assess the possibilities for the development of the sector, according to the contemporary globalisation of the social environment and especially since Bulgaria is part of the common European cultural space.

This work does not pretend to be exhaustive. The issues addressed in it are complex and could be the subject of numerous scientific studies.

The following sources of information were used: documents related to legislative initiatives – laws and decrees; the State Gazette; electronic sources and information from websites of orchestras worldwide and in Europe (BNR Symphony Orchestra; ORF Vienna; RAI; SWR; Vienna Opera; Metropolitan; Marinsky Theatre; La Scala Milano; Youth Orchestra of the European Union; Orchestre Simon Bolivar, etc.); Official records published by the Ministry of Culture; Committee for Culture; State Archives; Almanacs and Encyclopaedias; Books and Journals detailed in the Bibliography and Siteography section; Doctoral student's personal archive, etc.

Assumed limitations in the research

The limitations introduced in the study are justified: the study of the internal factors influencing the quantitative and qualitative characterization of the work of the philharmonic musician is prioritized; the study of the factors of the external environment is based on diagnostic analysis, expert assessments and statistical data. The scope of symphony orchestras under review is narrowed to 20, according to the access to public information on them. This narrows the scope of the present study.

Scope and structure of the thesis

In accordance with the aim and objectives of the dissertation and taking into account the research thesis, the thesis consists of an introduction, four chapters, conclusion, bibliography, siteography and appendices. The four-chapter arrangement of the work is prompted by the need to present the problems of the research in a logical sequence.

Firstly, a study and analysis of contemporary, up-to-date literature sources and a summary of essential theoretical issues related to the existing theoretical formulations of the symphony orchestra problem, i.e. the nature of an orchestra and types, according to the ensemble, the founding and operational purposes. Secondly, the development and adaptation of methodological and methodical provisions for the evaluation and analysis of factors influencing the performance of symphony orchestras in Bulgaria.

The research examines the stages of development of musical (symphonic) institutions in Bulgaria and the process of cultural reforms in the music performing arts in the country.

Thirdly, the next chapter of the dissertation is a practical study aimed at the implementation of the methods. A model of the importance of strategy in influencing the performance of the Sofia Philharmonic Orchestra is developed and tested. A historical overview of the organisation; the state of its management structure as of January 2020; a Strategy for the Development of the Philharmonic for the period 2018-2021 is presented; and the approbation is carried out through an illustration of the institution's concert scheduling and implementation. Fourthly, ideas are presented on how to implement organisational change by improving the management of the symphony orchestra by establishing an institutional policy towards cultural industries or public and social activities, as well as some key aspects influencing the choice of management policy. Integral criteria for the assessment of symphony orchestra employees are proposed.

The thesis concludes with two sets of questions: first, a justification of the tasks accomplished in the overall research and the achievement of the main objective; and evidence to confirm the research (doctoral) thesis; second, a derivation, including necessary justification, of directions for future work and research in the field of symphony orchestra management to implement organisational change through improved management of organisational structure. Generalisations and recommendations for the subject of study are included.

CHAPTER ONE: THEORETICAL FORMULATIONS OF THE SYMPHONY ORCHESTRA PROBLEM

1. 1. The nature of the orchestra and types according to the ensemble

In this part of the dissertation, the meaning of orchestras and the essence of the word "orchestra" are introduced (according to the Bulgarian Dictionary, the Cambridge Dictionary, the definition website, the Reverso website, etc.). The types of orchestras are discussed and defined according to their size: a) chamber ensemble; b) chamber orchestra; c) symphonette; d) symphony orchestra; e) large symphony orchestra. The questions to be answered are: why is there a chamber ensemble and a chamber orchestra, and what is the difference between them? What chamber ensembles are there within the Sofia Philharmonic? What is the meaning of the term "philharmonic"?

How are major philharmonic institutions related to symphony orchestras? Chamber orchestras that bear this name and why?

There are various chamber orchestras in Bulgaria, and in the twentieth century it was common for state philharmonic orchestras to establish one with musicians from their symphony orchestra as part of their apparatus. As of 2022, there are 7 municipal chamber orchestras. There is also an intermediate category called "Symphonette". Performance experience shows that in most cases it is a small symphonic ensemble suitable for performing works from the classical period (17th century). As of 2021 there are three state and one municipal orchestra with this title in Bulgaria.

The main orchestral category called "**symphony orchestra**" is defined differently in different sources: the Cambridge Dictionary, the Merriam Webster website. The category "symphony orchestra" is essentially the basic type of formation implied when the word "orchestra" is used. Historically, the classical symphony orchestra has its origins in the Renaissance and later the Baroque, but the form in which we know it took shape during the Classical period (the second half of the 17th century to the early 19th century) in the development of "modern" music (modern in the sense of contemporary civilisation). In the late Romantic period, and especially in the late 19th and early 20th centuries, the symphony orchestra grew, and thus the additional category (some do not separate it from the previous one) of the "**large symphony orchestra**" emerged in the works of Berlioz, Richard Strauss, Mahler, Shostakovich, Stravinsky, Bernstein and many others. The number of instruments used varies according to the composer's concept.

The most transparent in this respect is the categorisation of orchestras in Germany, where symphony orchestras are divided into several main categories: Category A: 99 musicians; Category B+: 78 musicians; Category B: 66 musicians; Category C: 56 musicians. A fourth "D" category is also accepted, for orchestras with fewer than 56 musicians (symphoniettes). There is only one orchestra in Bulgaria as of 2022 with more than a three-digit number: the Sofia Philharmonic, which has 122 instrumentalists as of 1 January 2022. In this sense, today the Sofia Philharmonic is the only orchestra in the country that can be considered a "large symphony orchestra".

In terms of their composition, orchestras can be divided into several groups, ranging from a chamber ensemble to a large symphony orchestra, and in world practice there is no

uniform number of musicians for each type of orchestra. The affiliation of each ensemble to its respective group can be defined to a considerable extent according to the repertoire performed, as well as the presence of certain instruments in the orchestra's composition. The distinction between the different types of orchestral groups is clearest in Germany, where each category is strictly dependent on the number of musicians in the orchestra.

1.2. Orchestras, according to the act of foundation, can be: military orchestra; opera orchestra; philharmonic society; with an act of foundation by the funding party (state, city, radio...); after leaving another orchestra; youth (or academic) orchestra; founded on the idea of a person (businessman, patron); founded for/by a conductor. All the known ways in which today's orchestras have come into being (worldwide) are represented. Each orchestra falls into one of the above categories.

1.3. Types of orchestras according to their operational objectives

In his book "*Orchestra Management*", the well-known cultural researcher Gerald Mertens divides orchestras into four categories. Mertens calls this division "*The four-pillar model of German orchestral space*". The purpose of this dissertation is to examine the types of symphonic ensembles, and therefore categories and subcategories such as chamber orchestra, string orchestra, wind orchestra, etc. will be excluded from the "symphonic" categorisation of orchestras. The differences between the studio orchestra and the symphony orchestra are indicated. In recent years, a phenomenon has become more fashionable - a "novelty" (in quotes, because that's how it all started in the early twentieth century) - the film concert - the broadcasting of films with a live orchestra. Examples of film orchestras are given as additional siteography.

Differences in performance of different orchestral ensembles. Summary

Symphony orchestras can be divided into several categories, depending on their operational goals. These categories have no direct relevance to composition setups, visually they may look identical. The difference in their qualities is due to their various purposes.

To choose what kind of symphony orchestra we want to work with, we have to be clear about the product we require. Despite their different purposes of existence, different types of philharmonic orchestras can, if necessary, play a different role on the stage from their

main one, and the difference in their performance would, in most cases, be imperceptible to the general listener. However, as a sum of qualities resulting from the operational goals of the ensemble, the philharmonic orchestra is best suited for high overall performance on the concert stage.

1.4. Property of the orchestra - participation of the orchestra members

In his book *The Art of Orchestral Conducting in Bulgaria*, conductor Ivan Iliev defines two types of musical structures: 1. Traditional triangular structure: music director, executive director, board. 2. Cooperative form of management, where the musicians own and manage the orchestra. Which option is better for the musicians - to be co-owners or to be hired? Under cooperative ownership, orchestra members are part of the orchestra not only as musicians, but also with their ideas for the development of the ensemble, with active participation in the choice of repertoire, guest artists, additional commitments such as recordings, tours, and so on. Then the musicians also take the corresponding risks, because in the case of an economically unbalanced policy or in the case of force majeure events beyond their control (such as the pandemic of 2020), they actually lose their proportional salary.

1.5. The relationship between the “institutions” Orchestra and Hall

Crucial to the performance of a symphony orchestra is the environment in which it functions, i.e. the concert hall. Orchestra and hall are not always equivalent and the relationship between them can be divided into four different groups: a) the orchestra owns/manages the hall; b) the hall owns/manages the orchestra; c) the orchestra rents the hall; d) the hall is an open stage and rents orchestras; e) fusion.

Bulgaria Hall, built in 1937, is the best acoustic concert hall in the country and, according to its regulations, is managed by the Sofia Philharmonic. It is a fact that the Bulgaria Hall operated on a similar principle before 1944. Another such case in Bulgaria is the National Palace of Culture (NPC). In 1986, based on the idea of conductor Emil Chakarov, the Sofia Festival Orchestra (also called the Festival Symphony Orchestra) was established at the NPC to serve the New Year's Music Festival at the NPC. This orchestra, whose principal is the National Palace of Culture, still gives concerts (mainly on January 1 in

Hall 1 of the National Palace of Culture), but in reality, the orchestra does not exist permanently, but assembles only when necessary.

This chapter also provides sufficient information about orchestras and halls in Bulgaria and in some parts of Europe and the USA. Particularly important for an orchestra is the venue in which it works and how they interact continuously - in a positive, sometimes not so positive, sense. The idea of providing this information is to show the Orchestra-Hall (building) or Institution relationship, as often the importance of this relationship also requires proper management. Especially if you have to be a manager over a longer period of time and have a longer-term agenda and vision for the development of the orchestra.

1.6. Significance and influence on the status of music ensembles of the terminological categories "*philharmonic*" and "*symphony orchestra*"

An interesting phenomenon is the fact that in the public sphere the "concert" orchestra is once called "symphony", sometimes "philharmonic". There are also several orchestras, such as the Sofia Philharmonic Orchestra, which have neither "symphony" nor "orchestra" in their name. And here the unfamiliar would ask: is the Sofia Philharmonic a symphony orchestra and the New Symphony Orchestra a philharmonic orchestra? This is a special topic, which, due to different traditions in different countries, sometimes manages to confuse even outstanding professional musicians. This part of the work clarifies these terms in detail.

Conclusions of the first chapter

1. According to the facts reviewed, regardless of their status and funding (in the West mainly municipalities, regions and sponsors, in the East the state), most orchestras today bear their name by tradition, without making a serious distinction in the meanings of the words "symphonic" and "philharmonic". However, according to many music professionals, the term "philharmonic" has a different status and position in musical and social life. There is a famous joke in music circles that all philharmonic orchestras are symphonic orchestras, but not all symphonic orchestras are philharmonic orchestras. In connection with this joke, it is no joke at all that the term "symphony orchestra" is a generic term, while "philharmonic orchestra" is always part of a name.

2. Philharmonic orchestras, although rare, exist with only a chamber orchestra. When the subject has come up for discussion among musicians, they have often rightly resented the fact that philharmonic orchestras are not composed of amateurs. The answer, however, is again in the context of the words - they are amateurs, not because they are not professionally good enough, but because they do what they love. Or at least that's the case with the people who founded the philharmonics. In the words of a representative of the Berlin Philharmonic, to be a "philharmonic" you really have to love music.

3. Today, the terms "symphony orchestra" and "philharmonic orchestra" mean the same thing to most people-a large musical ensemble of classical musicians performing symphonic music. The two names are also used to distinguish ensembles of the same type in the same locality. The origin of the ensemble and the aims of its creators can be judged from the expression used.

4. The word 'philharmonic', however, is more saturated with content, it can be used to designate a cultural institution for the organization and dissemination of concert activity, it can also be the name of a concert hall. Similarly, while the term "symphony orchestra" is unambiguous, a "philharmonic" can include different formations - symphony orchestra, choir, youth, chamber and other ensembles.

5. In this sense, it can be assumed that the term "symphony orchestra" represents a performing ensemble, and a "philharmonic orchestra", according to the tradition of the word in the respective country, can in many cases be an organization for the implementation and promotion of concert activities with a wide range of genre repertoire and performing ensembles.

CHAPTER TWO:

ANALYSIS OF FACTORS INFLUENCING THE PERFORMANCE RESULTS OF SYMPHONY ORCHESTRAS IN BULGARIA

2.1. Musical orchestras in Bulgaria - "*philharmonic*" or "*symphony orchestra*"

There are two orchestras with "philharmonic" status in Bulgaria today – the Sofia Philharmonic and the Pleven Philharmonic. The Pleven Philharmonic, after the 2010

reform, has an orchestra and an administration (72 people in total) and does not have its own concert hall. Its main venues over the years have been the auditorium of the Pleven City Theatre, the Community Centre "Saglasie" and the Municipal Hall "Katya Popova". The Sofia Philharmonic Orchestra, which has its own concert complex - "Bulgaria Hall" (actually several halls), employs 294 people (as of 2020), which includes a symphony orchestra, a mixed choir, chamber instrumental and vocal ensembles, a children's choir, administration, technical services, a children's program "Fortissimo" and a digital department. Here, the history and manifestations of the name "Philharmonia" in Bulgaria after the Liberation are examined:

2.2. Stages of development of musical (symphonic) institutions in Bulgaria

The following is an attempt to provide a brief and concise overview of the stages in the development of musical and orchestral institutions in Bulgaria from 1878 to the present.

STAGE I. Presented in detail are: a list of the symphony orchestras in Bulgaria within the first stage of their development, according to the BAS Music Encyclopaedia of 1967; a list of the ensembles described in the Almanac "Semi-century Bulgaria" of 1929; a list of the ensembles up to 1944, according to the collection "Thirty Years of Bulgarian Symphony Orchestras" published by Science and Art Publishing House in 1974; a list of the ensembles up to 1944, according to the book "Bulgarian Music Theatre 1890-2001" (authors: Rosalia Bix, Anelia Yaneva, Romyana Karakostova, Miglena Tsenova), published by Academic Publishing House "Marin Drinov", 2005; List of the more significant ensembles until 1944, according to the book "The urban traditional instrumental practice and orchestral culture in Bulgaria" (author Elisaveta Valcinova - Chendova, Publishing House "Pony", 2000).

Summary: During the first stage of the development of Bulgarian orchestral art, the initiative was in the hands of amateurs, in many cases those who had completed their education abroad. Most of the ensembles did not survive long due to financial and organisational problems. However, there was a desire to "*bring European culture*" to Bulgaria through instrumental art, and this has led to a great extent to catching up with the historical delay in the development of classical music in Bulgaria, for objective reasons. The state had no official relation to orchestral art, the only orchestra established

by royal decree at an institution subordinate to the Ministry of Education was the "*State Philharmonic Orchestra at the National Opera*" in 1935. A major exception to the overall state policy was the Ministry of War, which established in 1892 (by decree of the Knyaz) the first representative symphony orchestra in the country, as well as dozens of other (military) orchestras in the capital and the country. In addition, the Ministry of War created conditions for training future musicians for the symphony and brass bands. It can be argued that the Ministry of War played the greatest role in the development of symphonic art in this country in the period 1878-1944.

STAGE II. The institution administratively connected with orchestras in Bulgaria is now the Ministry responsible for culture: 1944 - Ministry of Propaganda; 1944-1947 - Ministry of Information and Arts; 1947-1954 - Committee for Sciences, Arts and Culture; 1954-1957 - Ministry of Culture; 1957-1963 - Ministry of Education and Culture; 1963-1966 - Committee of Culture and Arts; 1966-1977 - Committee of Arts and Culture; 1977-1986 - Committee of Culture; 1986-1987 - Council for Spiritual Development under the Ministry Council; 1987-1989 - Ministry of Culture, Science and Education. Provided in detail: List of symphony orchestras in Bulgaria within the second stage of their development according to the Music Encyclopedia of the Bulgarian Academy of Sciences, 1967; List of symphony orchestras in Bulgaria within the second stage of their development according to the collection "Thirty Years of Bulgarian Symphony Orchestras" published by Science and Art Publishing House, 1974. (with the exception of the city of Sofia, where it is about four different orchestras; in the other cities each described orchestra is a successor of the one that existed before it); List of symphony orchestras in Bulgaria within the second stage of their development according to the book *Bulgarian Music Theatre 1890-2001* (authors Rosalia Bix, Anelia Yaneva, Romyana Karakostova, Miglena Tsenova), published by Academic Publishing House "Marin Drinov", 2005¹. The second stage in the development of symphony orchestras in Bulgaria is characterised by the nationalisation (mainly after 1944) of the existing local structures and their legalisation. In the biographies of most cultural institutions in Bulgaria, the date

¹ In this book, the focus of which is not symphonic music, it is not always clear after 1944 when opera houses had their own opera orchestras and when the state symphony orchestras in their respective cities were used.

of state ownership is also given as the date of establishment of the respective modern institution.

Summary: In the second stage of the development of symphonic performing arts in the country, the greatest role was played by the state and, in less frequent cases, by local municipalities. Private initiative was, unfortunately, discontinued as a result of state policy. The state-owned ensembles were, in most cases, given the opportunity for serious development and growth - both artistically and organisationally. Overall, orchestras were smaller than in the pre-1944 period, but they were permanent, with funding secured, and for the first time a comprehensive state policy and attitude towards the development of symphonic art was formed. It was strongly negative that, for political reasons, the historical development of the pre-1944 ensembles was neglected/erased and, although most of the state symphony orchestras were heirs to decades of tradition, the date of their establishment was taken as the year of their nationalisation. In this sense, the 1974 book by Bogomil Starshenov, edited by Lea Cohen, *Thirty Years of Bulgarian Symphony Orchestras 1944-1974*, published by the publishing house “Nauka i izkustvo” (“Science and Art”), is valuable, where the expression used for orchestras after 1944 is precisely 'state-controlled', not 'established', as was the generally accepted practice for that period.

STAGE III. The institution administratively related to orchestras in Bulgaria is again the Ministry responsible for culture: 1991-1992 – Ministry of Culture; 1992-1993 – Ministry of Education, Science and Culture; 1993-2005 – Ministry of Culture; 2005 – Ministry of Culture and Tourism; 2005-2020 – Ministry of Culture. The post-1989 period is mainly characterised by the continuous reform of the state cultural institutes to adapt them to the conditions of the market economy in the country (a continuous process running in different directions from 1990 to 2020), as well as the emergence and development of various private formations. A list of orchestras in Sofia during the third stage (after 1989) is provided. Orchestras (excluding brass and youth orchestras) are shown by type. A division of orchestras by funding is presented.

Over the last 30 years, the Bulgarian state has created conditions for the development of state structures that have destroyed those with public (state) funds, without in any way supporting the long-term, steady development of the independent sector. Even in 2020, in the conditions of crisis (with the global pandemic of Covid 19), the state equated the

musicians with state funding with the administrative workers, providing them with the salaries for a certain period of time, but stopping with a series of normative acts their chances of getting out of the crisis and their further development, trying at the same time to announce a number of projects for the independent sector that have no long-term effect. All of this has led to serious tensions between artists, dividing them, quite wrongly, into almost non-existent worldwide categories.

After 1989, the state has no clear attitude towards the future development of the symphonic performing arts. In the state sector there are continuous chaotic reforms that give the impression of a complete lack of conception and vision of the direction of development. Municipal ensembles are in some relative lethargy because of the way they are financed and managed, which is a legacy of the previous political period. In the private sector, which is entirely new to the country (since there are no existing remnants of the same before 1944), there has been a certain development, not without the help of the state, especially in the larger cities (and in recent years almost exclusively in the capital). The private structures are companies working on a project basis, without permanently employed musicians. Different opinions are presented, especially the **views of *the audiences, musicians, state (municipal) institutes and private/independent structures.***

The AUDIENCE is the consumer in the performing arts. Everything that is done is done for the audience. The interests of the consumers (the audience) can be expressed in the short sentence: more quality at a lower price. Which in itself is a problem, because quality costs money.

MUSICIANS in Bulgaria are a special category, according to the pay, which is significantly below the average salary level in the country and also, significantly below the average pay level of musicians in countries with a classical music tradition (only in the public sector). In the independent sector, wage earning musicians are almost non-existent. To maintain a normal standard of living, salaried musicians in the public sector take on additional commitments outside the institute to which they are appointed. In the long run it means accumulated physical, intellectual and emotional fatigue, leading to the performing standard of an orchestra we observe today.

THE PRIVATE STRUCTURE. Private/independent structures in Bulgaria do not have the security that state structures have had until recently and are required to be innovative and

always interesting to succeed. For them financial failure equals bankruptcy. They are interested in what is attractive to the public and provide it, although the price is often very high. This is one of the two theses about art - it is a luxury, and it is expensive (the opposite thesis is "*art - close to the people*"). The problem with private arts bodies in our country is that they don't have their own facilities and most of them don't have their own range of artists/musicians either. That is, they function on the well-known in various countries principle of "*telephone orchestras*" (exactly this expression has come to be used for such ensembles) - the necessary people are gathered, rehearsed according to the available means and a concert is delivered. There are not many reasonably good musicians left in this country who are available. The private structures in our country do not exist on a general basis with appointed choirs and orchestras (salaries-taxes-insurance) because they lack the financial resources to do so. There is no law that regulates sponsorship or patronage in a way that would be of interest to give money to the arts. The successes of private initiatives are greater because private entities are adaptable and creative in their need to survive. The most spectacular case of this is that of *Cantus Firmus*, which since the beginning of the 21st century has filled a huge gap in Bulgarian concert life, bringing to Bulgaria names that no state structure could afford after 1989.

THE STATE CULTURAL INSTITUTE. The arts did not originate as state-subsidised, but in the early twentieth century the rulers of many countries became aware of its influence on society and assumed the role of greatest patron, the process being smooth in places as the form of social government changed from monarchy to republic. Today, some countries (Austria) use art as a mainstay of their economy, but also as a tool to gain international prestige and influence. Others (Italy) use it as national pride and wealth. For others (Russia) it is a way of promoting ideas and policies among the public and of facing the world. Others (USA) have created conditions for it to develop independently as a business, without direct state intervention. There are also countries (such as Bulgaria) where art has an unclear status and the state policy towards it is more socially oriented - to socially support people who engage in such activity without serious expectations for development. Over the last decade, the state has been making efforts to steer societal structures towards a more market-oriented and adaptive mindset.

The strength of the symbiosis between public and private sectors is not clear. **Private structures** cannot currently do without the state, which provides the foundation on which

musicians can stand - such as salaries, insurance, professional practice, and social security. Most concert halls are also state or municipal. The state, when it has a clear cultural policy, spends money to create and develop the public's taste, from the satisfaction of which the private and independent structures can then profit. **The state institutes** cannot do without the private ones to provide additional income to the musicians, because the budget that is formed by the growth of economy is insufficient (the budget for culture is one of the lowest in the developed countries). **Audiences** benefit from both - public ensembles provide a basis for a permanent cultural life and private organisations, when they have visionary leaders, can enrich cultural life with ideas and performers that are not always possible for budget organisations. **Musicians** benefit from the state for giving them security in the present and in the future when they will not be able to work (retirement benefits), they often get instruments, and the possibility of maintaining them...; they also benefit from private projects from which they get extra income to help supplement their basic salaries.

2.3. The process of cultural reforms in the performing arts in Bulgaria

After 1989, a number of processes (called reforms) took place in Bulgaria. The state continues to control the activities and policies of cultural institutions to a large extent, but funding for them is very limited given the new market conditions. Actions are visible in the period 1991-2020, but there is no overall vision of what the state should do with its cultural institutions.

A comparison of these reforms reveals their inconsistency and disregard for the historical, economic and social preconditions for the existence of the cultural institutions concerned.

2.4. Analysis of the reforms carried out in the professional music sector over the last 30 years

All the reforms since 1989 have been carried out mainly by the Ministry of Culture (MC), which over the years has been merged with and separated from other ministries, those of education and science, and also of tourism. Decree No 139 of the Council of Ministers of 19 July 1993, promulgated in issue 26 of the State Gazette in the same year, laid down 'the main functions of the Ministry of Culture and the principles of the National Cultural

Policy'. **The very clear definition of the MC's activities and of the prospective national cultural policy give a concrete idea about the directions for the future development of culture in Bulgaria. However, has this policy been followed over the years?**

The first changes took place in 1991, when several legal changes, seemingly invisible to the public, took place. Decree No 206 of 22 October 1991 defined the main functions and tasks of the Ministry of Culture (Article 1) and established various national centres, one of which (according to Article 3 a.1 item 3) – the **National Centre for Music and Dance**. The establishment of this centre is a major step towards the decentralisation and depolitisation of musical life in the country, including the activities of the state music institutes. No further steps have been taken in this direction. Moreover, in 2006 the status of the National Centres was removed by Decree No 149 of the Council of Ministers (Section VII) and they were transformed into directorates of the MC without legal and financial autonomy.

Decree No 22 of the Council of Ministers of 4 February 1992 defined the main functions and tasks of the Ministry of Culture. Paragraph 3 of the final provisions of the decree **abolished** the MC structures, such as the Bulgarian Impresario Directorate "Sofia Concert", the Concert- Artist Centre and the Directorate " International Festival "Sofia Music Weeks".

By Decree 114 of 6 June 1995, the Council of Ministers regulated the extra-budgetary financing (an extra-budgetary account was opened) of the Culture Development Fund (the future Culture Fund).

Decree No 194 of 15 September 1994 closes the Pleven Opera House. Its Article 3 also abolished the state structures for organising concerts - the " Agency of Music" - in the towns of Vidin, Gabrovo, Dobrich, Kardzhali, Lovech, Pazardzhik, Pernik, Sliven, Targovishte, Shumen and Silistra. Six state theatres were also converted into "open stages", with only administrative and technical services provided.

Decree No 204 of 11 November 1999 (published in issue 105 of the State Gazette) abolished the Chamber Music Agency and the Institute of Cultural Studies (art. 3).

After the 1989 changes, an attempt was made to legally establish representative state institutions in the various fields of art. Decree No. 128 of 11 July 1994, based on the Constitution of the Republic of Bulgaria and promulgated in State Gazette No. 59 of 22 July of the same year, established the special status and method of financing of the **national institutes** (State cultural institutes of national importance), **which are responsible for the implementation of State politics.**

In 2000, by Decree of the Council of Ministers No 96 of 2 June, published in State Gazette No 48 of 13 June, this Decree was cancelled and replaced by the 'Ordinance on the acquisition and deprivation of the status of State cultural institute of national importance'. The criteria (described in Article 4(3)) for assessing eligibility for this status are defined. Art. 7, para. 3 states that "*State cultural institutes (SCIs) of national importance shall be financed entirely and as a priority from the budget of the Ministry of Culture.*"

Decree of the Council of Ministers No. 15 of 31 January 2011 sets out the uniform expenditure standards of the state cultural institutes in the field of performing arts but does not differentiate between CCIs with and without national status. Under this decree, the funding of Sofia Opera and Ballet is equal to that of the opera theatres in Plovdiv, Stara Zagora, Burgas, Varna and Ruse, and the funding of Sofia Philharmonic is equal to that of the orchestras in Shumen, Vidin, Vratsa and Pleven.

It is important to note that the text of Article 7 of the ZZRK has not been changed and according to it the national cultural institutes should **continue to be financed "entirely and as a priority from the budget of the Ministry of Culture"**.

Reform of the government of Ivan Kostov (1999)

Decree No. 36 of 27 January 1999 implemented a major and serious reform (through Minister Emma Moskova of Ivan Kostov's government). The decree directly concerned only four cities, but the policy that followed led to the division of musical institutions into three main categories: **national** (Sofia Philharmonic, Sofia Opera and State Music Theatre - Sofia); **opera and philharmonic societies** (OPS in the major centres of the country - Ruse, Plovdiv, Burgas and Varna); **specialised state cultural institutes** at local level - philharmonic societies in Shumen, Pleven, Vratsa and Vidin and opera in Stara Zagora. This reform strengthens the influence of the newly established OPSs in their areas

of operation but has led to difficulties (due to staff cuts) in carrying out the duties of the institutions in Shumen, Pleven, Vratsa, Vidin and Stara Zagora when they have to perform larger works from the classical repertoire, using musicians from related institutions as necessary.

Comparison in figures: until the unification of operas and philharmonic orchestras into opera and philharmonic societies, the newly established structures had an initial full-time staff approved by the Ministry of Culture, which was gradually reduced by a number of administrative acts. In the 1999 reform, music institutions in different cities followed different paths of development. Each of them followed the vision of the respective director and the deviation in activities was a result of personal preferences rather than the available resources. The most striking proof of this is the sharp turn and development in recent years of the State Opera Plovdiv. It is essential for the 1999 reform that the **basic principle of financing the state cultural institutes has not changed**, they have a **fixed credit** from the state budget until 2010 and are in relative financial stability, regardless of the results of their activities.

In 2004, following a public debate, a change in public sector cultural wages was implemented: by Decree No. 314 of 22 November 2004 from the Council of Ministers, published in the 104th issue of the State Gazette of 26 November 2004, the Council of Ministers increased by 50% the wages of artists on a permanent contract.

In 2009, a series of personnel changes in the Ministry of Culture, coupled with a desire for change by the new state leadership, also led to divergent ideas, often with no apparent coordination between them. This led to spontaneous reactions throughout the stage guild.

DRAFT Performing Arts Law (2010)

Initially the MC, after various ramblings through orders and decisions, attempted to create a *Performing Arts Act*. Such a law would regulate the sector and could bring stability. However, the texts of the law are extremely contradictory and not in line with the Bulgarian historical, social and normative reality. Due to the wording of Article 28 and Article 45 (in it), the draft law was rejected by the artistic circles with a series of petitions, protests and media appearances and the MC directed its efforts in another direction. **Eventually, Article 28 came into force a year later with the so-called "delegated**

budget" title. The Performing Arts Act did not become a reality, but the Council of Ministers' Decree No 152 of 28 July 2010, published in issue 58 of the State Gazette of 30 July 2010, implemented the **new major reform** in the Bulgarian performing arts.

2010 - REDUCTIONS OF STRUCTURES AND STAFF: The opera and philharmonic societies are again reorganised and some of their old functions, from before Minister Moskova's reform, are returned. This effectively cuts half of their activities, while changing their meaning and effectiveness - i.e. cutting a significant part of their staff. This transformation project is purely financial and does not take into account the specificities of individual cities and institutions and the needs of local audiences. **The 2010 reform consists in cutting staff and abolishing the "philharmonic" status in the regions** (with two exceptions - Sofia and Pleven).

The Decision No. 14 of 31 January 2011, which defines the first- and second-level authorising officers in the Ministry of Culture, lists all the second-level authorising officers in the field of culture - 105 in total. There are 5 symphony orchestras in total: Sofia Philharmonic Orchestra; Pleven Philharmonic Orchestra; Vidin Symphony Orchestra; Shumen Symphony Orchestra; Vratsa Symphony Orchestra.

2011 – DELEGATED BUDGET: as a follow-up to the 2010 reform, in 2011 the Parliament adopted a **new funding system for** state cultural institutions in the performing arts (often mistakenly referred to by the generic name "theatres") - **moving from "hard" funding to a delegated budget.** The underlying principle is that the subsidy of the institutes **depends on audience attendance.** The context is that the more audiences an opera house has, the more subsidy it receives from the state. There are some good points - institutes with enterprising managements have higher funding. What happens? In 2015 Lyubomir Kutin collected data from state cultural institutes and made an interesting analysis of the reform since the introduction of the delegated budget in 2011, reporting unstable revenue growth (details in the dissertation). It shows a 48% growth compared to the initial year (44% for Sofia, 59% for big regional cities and 29% for smaller cities). The data collected by Lyubomir Kutin exists in the Ministry of Culture, the figures are: 349.999 spectators in 2011; 397.691 spectators in 2012; 496.487 spectators in 2013; 585.995 spectators in 2014. We can see an increase of 67% in 2014 compared to 2011 (60% for Sofia, 81% for major regional cities and 38% for smaller cities). Cultural

institutions are finding a way to survive and even develop their audiences, spurred on by the delegated budget. The philosophy of cultural institutions is changing completely: instead of shaping and developing the tastes of the public, a slow and complex process, cultural management is obliged to take into account the given in order for the ensembles to survive: the profitable ones are those that rely on a more popular product, while the artistic criterion is completely ignored and subordinated to the market principle.

2015 – CHANGE of the basic unit of measuring:

The new reform is ostensibly a minor correction of the 2011 reform, but it fundamentally changes the principle and is the next step towards the marketisation of culture in Bulgaria. In 2015, the delegated budget will be changed so that the subsidy will no longer be per spectator who buys a ticket, but per leva earned from ticket sales. The actual income from tickets will be subsidised, and the number of visitors will only be important for statistics. The institutions most likely to survive are those located in economically strong cities.

In 2014, Decree No. 45 of 6 March made a new partial step in the opposite direction - the theatres in the cities of Razgrad and Kardzhali were transformed into a "Theatre and Music Centre", restoring the activities of the Razgrad Philharmonic Orchestra, as well as the music and dance events in the city of Kardzhali (but without restoring the city's symphony orchestra).

The change in the standards (through the DCM) of the delegated budget over the years shows a policy of "trial and error" and the attempt of the Ministry of Culture to react in motion to the economic and cultural situation in the country.

Methodology: The Ministry of Culture issued a special '*Methodology for determining the funds under Article 23a of the Law on the Protection and Development of Culture of the State Cultural Institutes active in the field of performing arts*' - a specifying normative document which has become a fundamental document for the activities in the performing arts in the country in the last ten years. The Methodology defines two components for the financing of state cultural institutes - a *Basic Component* (basic for the budget of the institutions) and *Additional Components* (population of the cities, participation in festivals in the country and abroad, awards won, stage realization of a newly written work, creation of risky (from the financial point of view) productions, work in areas with specific

conditions). An important point in the Methodology is the '*optimisation of the cultural institutions' own contribution to their financing*', which is a step towards the way state cultural institutions are financed in many developed countries. As a result of this Methodology, most music ensembles have serious difficulties in meeting their annual budget requirements and are reorienting their activities towards the 'entertainment' genre. A number of concerts with artists out of the classical genre appeared in the musical activities of the state institutes, such as: Krisko, Margarita Khranova, Yordanka Hristova, Nina Nikolina, Desislava, Ruslan Muinov; the groups Kikimora, Signal, The Foundation, Diana Express and many others.

In 2019, the Ministry of Culture is taking corrective measures to stop the genre shift, as evidenced by DCM No. 269 of 24 October 2019, published in issue 84 of the State Gazette. However, these activities are counterproductive, as there is no mention of genre restriction anywhere.

As of now, the form of the delegated budget can in practice only serve to reduce the funding of the State Cultural Institutes, but not to increase it.

In 2020, with the announcement of the global pandemic Covid-19 and the ensuing state of emergency on the territory of the Republic, the State Cultural Institutes are understandably unable to finance even the CT-protected salaries of their employees, leading to PMS No. 64 of 9 April 2020. The delegated budget is temporarily suspended. The very fact that a system that, as a state, should be sustainable is being adjusted at a time of crisis means that the system is not functioning sustainably.

ALTERNATIVE opinions and views: why could we call the reforms of the last 20 years a failure? The key point in all the transformations of the last decades is only the desire to save financial resources in the state budget, due to the different nature of the "crisis" over the years. In the Bulgarian case, each reform renders the previous one meaningless, and often at a time when the structures on the ground have gradually begun to overcome the shock of yet another change.

There are key problems without solutions, leading to clashes between artists. Regulations alone do not solve cultural problems if they are not in line with historical and social strata. For this reason, cultural legislation in different developed countries, such as Austria,

Germany, Italy, France, Russia, China, the UK or the USA, is very different, taking into account national traditions and different attitudes towards culture as a means of social enrichment or as a cultural industry.

In 2016, I expressed my opinion on the matter with a special "*Questionnaire for statesmen with the intention to overhaul culture*" to the *Ploshtad Slaveykov* media and to this day it is still not so different. Any reform in the public sector should normally follow the vision of the national strategy in the respective professional field, in this case - the **National Strategy for Cultural Development**. It is no coincidence that the need for such a strategy is described in Article 2a of the *Law on the Protection and Development of Culture*. The draft *National Strategy of 2011* is 58 pages long, of which a little more than 2 pages are devoted to the performing arts, presenting a SWOT analysis of the situation (pp. 39-40) and '*optimisation of the organisation of work in the performing arts*' (p. 25 - in fact, it is about the already introduced '*delegated budget*' and '*reduction of staff, but not of employment*'. The 2019 draft *National Strategy* is made up of exactly 100 pages and is more favourable to the performing arts. It includes an analysis of the previous six years (pages 25-30), and for some reason symphony orchestras (wrongly referred to by the generic name "philharmonic orchestras") are not grouped with the other performing arts institutes, but with the folk song and dance ensembles. Clearly the 2019 draft is considerably more mature. Both strategies celebrate cultural heritage (of the arts), performance (the arts) and education (in the arts) as significant, missing the fact that the arts - whether as history (cultural heritage), present (theatres, community centres, etc.) or future (arts education) are part of CULTURE, as a way of self-expression and development of a nation.

The PhD student's opinion (proposal) is added to the dissertation in a paper entitled *PROPOSAL FOR INCORPORATING A SPECIAL SECTION AND PARAMETERS TO A FUTURE NATIONAL CULTURAL STRATEGY*. The above ideas for a *National Cultural Strategy* are absolutely non-binding and are the result of my personal experience.

Chapter two: conclusions

1. The word "reform" should not be synonymous with "downsizing", but with a change in the way the system works, considering global and regional trends, without ignoring the historical and cultural particularities of the regions concerned. A change that would give

a new impetus in the old direction or in a new direction, along new paths or by new means! The term "reform" should be inseparable from "innovation". For if there were no innovation, there would be only the simple reproduction of old forms. And such action is formal and not conducive to long-term positive results.

2. A broader interpretation of the term "innovation" means an idea that is used for the first time by an organisation or a group of organisations with a common purpose and activity to turn opportunities into reality more quickly and efficiently. In the world of cultural organisations this means - properly organised costs, increased interest and attendance, increased income, but also a richer repertoire, more diverse performers, a higher artistic level, educational and social activities and a high profile in society. This should be the point of reform, and this is what has been lacking in our country.

3. Before thinking about the reform of the performing arts in Bulgaria, it is important to seek a clear definition of the concepts of *cultural industry* and *cultural policy*.

What should guide the reform of the sector is a clear vision of the desired outcomes.

4. The main thoughts when wishing to reform, based on a working National Cultural Strategy, should include clear ideas in the following four points: (A) funding and returns; (B) structure and management; (C) public positioning; (D) level of professionalism.

5. Only after the adoption of the *Strategy for the Development of Culture of the Republic of Bulgaria*, should we talk about reforms based on the long-term strategic goals.

6. In the case of the performing arts, the question should be answered as to what is expected of the cultural sector in terms of (i) building an 'entertainment' sector; (ii) building a way of thinking and behaving in society; (iii) creating a particular stratum in society; (iv) promoting certain ideas; (v) building resistance to certain social phenomena; (vi) creating options for a cultural 'outlet'; (vii) building a cultural industry; (viii) national image and national self-esteem; (ix) what and how structures are needed to achieve the various objectives, i.e. public institutions, private and independent structures.

7. The most appropriate form of: fixed or variable public funding; project funding; mixed funding; private funding or combined mixed co-financing should be applied to the relevant cultural policy structures.

8. In the public sector, which for objective reasons could be the most stable, with a clear vision of cultural policy, reforms should be based on the following eight lines of development: (i) optimising expenditure; (ii) increasing revenue; (iii) reaching larger groups of users; (iv) a richer and more varied repertoire; (v) supporting artists with distinctive profiles and high professional qualities; (vi) striving for the highest possible artistic level; (vii) ongoing educational and social activities; (viii) ensuring a broad public impact and supporting the achievement of a high national image.

CHAPTER THREE: TESTING A MODEL FOR THE IMPORTANCE OF STRATEGY AS AN INFLUENTIAL FACTOR ON THE PERFORMANCE OF SOFIA PHILHARMONIC ORCHESTRA

3.1. History of Sofia Philharmonic

Stages in the history of the orchestra: ● Background (1879 - 1892); ● Leibguard Orchestra (1892 - 1936/1938); ● Royal Military Symphony Orchestra (1936/1938 - 1944); ● DSO to the Broadcasting (1945 - 1947); ● Bulgarian National Philharmonic (1947 - 1949); ● Sofia State Philharmonic (1949 - 1989, 1989 - present); Lateral dominants: (Bulgarian National Philharmonic, Academic Symphony Orchestra, State Philharmonic, etc.).

Incorrect historical line of early history

In 2018, the Sofia Philharmonic celebrated its 90th anniversary. This part of the dissertation recounts the real origins of the ensemble with the requisite details and evidence (details in the dissertation).

3.2. Status of the management of Sofia Philharmonic Orchestra

(as of 1 January 2020)

Governing body: the Sofia Philharmonic is governed by a director selected via a competitive procedure by a committee appointed by the Minister of Culture. The requirements for participation in the competition are determined by his order, in accordance with Ordinance No. H-4 of 14 June 2007, published in issue 50 of the State Gazette of 22 June 2007. Applicants must submit a concept for the development of a State cultural institute in the field of music and dance. The position is to be held for a period of

5 years. The Director is the main person financially responsible for the Sofia Philharmonic. Within 6 months of appointment, he/she must submit for approval to the Minister of Culture the "Bylaws" of the institution. The Director determines the structure and management of the institution under his/her management and is obliged to notify the Ministry of Culture in due time when changes are made.

Management Structure. As of 2019, the Sofia Philharmonic has an existing pyramidal management structure with a total of 269 employees. The following management structures of the SP are to be described in detail: the Board of Directors, the Artistic Council, the Syndicate Council, the Orchestra Council and the Choir Council. The Sofia Philharmonic performs its activities on the basis of normative rules and documents for the various structures, which are approved by the Director in consultation with the representatives of the trade unions. The three main normative documents are: *the By-laws of Sofia Philharmonic*, which define the activities and objectives of the institution, its structure, the manner of management and the relations with the principal authorising body - the Ministry of Culture; *the Internal Regulations*, which specify the procedure for the appointment and termination of employment, the rights and obligations of the SP employees, the working hours and remuneration, the organisation of the preparation and implementation of the activities, work discipline and disciplinary *sanctions*. There are also *additional normative documents* which define in detail the activities and relations in the Sofia Philharmonic, such as: *the Development Strategy of the Sofia Philharmonic*; the *Collective Employment Agreement*; *the Accounting Plan of the Sofia Philharmonic*; the *Internal Rules for Wage Organisation*; the *Rules of Financial Management and Control*; etc. (described in detail in the thesis).

The By-law on the Structure and Activities of the Orchestra is proposed by the Director of the respective institution. **Thus, the entire structure, management and activities of state cultural institutes in Bulgaria are a result of the vision of the Director for the respective institute!** (The Bylaws of the Structure and Activities of the Sofia Philharmonic under the leadership of Naiden Todorov (2018) are presented in the Appendix.

3.3 SWAT analysis of the state of the Sofia Philharmonic (as of 31 December 2022)

To build a successful *Development Strategy for a symphony orchestra*, it is necessary to first analyse its strengths and weaknesses, as well as external threats and opportunities for development. Moreover, all four factors in the analysis are dynamic and can change on the fly. An in-depth analysis of the state of Sofia Philharmonic Orchestra as of autumn 2022 is presented, with relevant strengths, weaknesses, development opportunities and possible further barriers. This **SWAT** analysis implies a serious debate, but this will probably be part of another written text and a national discussion.

3.4. Development Strategy of Sofia Philharmonic Orchestra

Culture is not binding. It is in a constant process of development - evolution or decay. The European Community, with the motto "*United in Diversity*", is the cultural diversity of the Member States of the Union.

Classical music is the common heritage of all the countries of modern European civilisation. **The Sofia Philharmonic Orchestra is not only Bulgaria's ambassador to the world, but above all an ambassador of European culture in Bulgaria.** By carrying out its activity of performing Bulgarian classical and contemporary masterpieces, but also those of other nations, the **Sofia Philharmonic Orchestra is an embodiment of the motto of the European Union - "United in diversity"**.

Within the framework of the dissertation, the following main points of importance for the institution of the Sofia Philharmonic Orchestra are presented: the mission of the Sofia Philharmonic Orchestra; the structure of the institution; the goals of the institution in three main categories - creative, economic and social; the highlights in the development of the Sofia Philharmonic Orchestra in terms of: material equipment, administrative sustainability, personnel policy, financial stability, concert activity, repertoire policy, work with the public, public activity, educational activity, building public prestige, marketing, digital activity and international presence. **The idea for this part of the text is to specify the factors that would lead to the creation of a successful and workable Development Strategy for the Sofia Philharmonic.**

The matter is versatile due to the lack of a *National Cultural Development Strategy*, which should serve as a basis for the strategies of the State Cultural Institutes of Bulgaria.

3.5. Planning and implementing a concert at Sofia Philharmonic

In general, the audience does not notice the strategy of a cultural institution. It is interested in the final product, which in an orchestra is the symphony concert. How is a concert realised? What is the process whose final result we see in the hall during the concert? The dissertation presents all the stages of the work of producing a concert cultural project. The **procedure** prepared by the Director of the Sofia Philharmonic includes all the important details for successful planning and realisation (implementation) of the concert activity of a symphony orchestra.

CHAPTER FOUR: IMPLEMENTATION OF ORGANISATIONAL CHANGE THROUGH IMPROVED SYMPHONY ORCHESTRA MANAGEMENT

4.1. Symphony Orchestra Management

Managers in the cultural world perceive it differently and shape their policies according to their views. Some see the arts as a cultural industry, others as a social superstructure of society. Several important points emerge from this part of the thesis: 1) Dependencies between the different performing arts: - **The Philharmonic Orchestra** (the main structure for this study); The **Opera Theatre/Musical Theatre**; - The **Drama Theatre**; - In of the smaller cities there are institutions "**theatre**"; - **Cinema**; - The **music festival** is a serious highlight as an event for society.

2) Dependencies between musical arts and virtual space: - **Radio**; - **Television**: Mezzo, Arte, Classica, Medici; - **Internet**: Spotify, Soundcloud, YouTube, Vimeo and many others. 3) Dependencies between the musical arts and the urban environment: - **Hotels**; - **Restaurants**; - **Public transport** offers a two-way interaction; - **Intercity and international transport**; - **Souvenir shops**, formal wear and shoe shops, florists; - **Bookshops** and music shops; - **Music schools/academies** - it is not only the personnel for the philharmonic orchestra or musical theatre that comes from them. 4) Dependencies between the musical arts and the industry: **The recording industry**; - Publishing companies, some of the biggest - Riccordi, Universal, Doblinger, Berenreiter, Breitkopf, Kalmus, Music, Sikorski and many others.

All these examples lead to the development of the economy, the prosperity of companies operating in cities and areas with cultural institutions and, consequently, to the increase of tax revenues. It is important to realise that **cultural funding is not a 'cost', but a long-**

term investment in the economy and the development of the urban environment - and not just in terms of amenity, but in terms of very real economic indicators.

Cultural institutions are also at the social heart of the community's intellectual capital, bringing additional benefits to both the urban infrastructure and society as a whole.

With a stronger economic orientation in arts policy, aiming at more direct financial revenues, there is a real danger of a gradual transition of the cultural industry into an entertainment industry - show business.

Symphony orchestras are not 'businesses' for financial gain, but institutions whose core business is primarily cultural and educational. Not a few important cultural figures take the opposite view of the activities of such an institution - not as a kind of "economy", but as a policy with a social and public focus.

Economic indicators are not at the core of culture's influence. Its strength lies in the development of society and the conditions of life in each environment. That is why the world's major cities maintain a substantial cultural infrastructure - not for its economic performance, but **for its impact on living standards.**

Cultural institutions, and symphony orchestras in particular, are necessary for the development of society, not as "factories producing and selling sounds", but as catalysts for human empathy, as schools for exploring our inner connection to the people and world around us.

Summary: The performing arts, and symphonic music in particular, have all the ingredients to qualify as a '**music industry**'. At the same time, it should be noted that their great strength lies elsewhere - in the beneficial influence of music on the human psyche.

4.2 Politics of orchestras - *cultural industry or social activity*

Different countries have adopted different management practices. So-called "European" and "American" models are used all over the world, with slight variations according to local politics. They have one main difference - in the "European" model, institutions are mainly publicly (state, regional, municipal) funded, in the "American" model - mainly privately funded.

At present, Bulgaria has a system of governance that not only does not fit into the two main models described above, but is also subject to constant changes, according to the views of the respective Minister of Culture and local directors. This system is a remnant of the development, according to the subjective perceptions of the various rulers of the time, of the system of centralised management of cultural institutions that existed in Eastern Europe until 1989.

A. Bulgaria

The management of orchestras in Bulgaria is a typical example of centralised management. In our country, the state institution is managed by a director who is selected through a competition announced by the Ministry of Culture for a period of 4 years (5 for national cultural institutes) according to Regulation H-4 of 2007. The elected director appoints or does not appoint at his discretion a *Chief Conductor*. It also appoints a *Chief Accountant* or selects an external accounting firm. The head of the institution is also the employer - he or she hires employees or terminates their contracts.

However, there was a time in the history of Bulgarian musical institutions when the leading role in orchestras was played not by the directors but by the chief conductors. In the memoirs of the long-time director of the Ruse Philharmonic, Silvi Stamboliyev^[21], one can read about the changes of 1978. Until 2022, the administrative and artistic management of orchestras was the responsibility of the directors, who also had a leadership role vis-à-vis the chief conductors they appointed.

B. European (German) model

The management structure of the so-called German model comprises three management figures: *the General Musikdirektor (GMD), the Intendant, and the Marketing Director (Geschäftsführer, Verwaltungsdirektor)*. In most cases in Germany, the structures of the performing arts are combined in a single institution under the general title of 'theatre'. The institution 'theatre' includes the departments of opera, operetta, musical, drama, ballet, concerts (chamber, vocal and symphonic). The General Director of Music is the face of the institution to the media and the public. The administrative and financial management

²Music in My Life, by Silvi Stamboliyev, Vanguard Print Ltd, 2006, p. 155

is concentrated in the hands of the Intendant and the Commercial Director. The post of General Music Director has become synonymous with that of Chief Conductor.

B. American Model

The management structure includes three management units: *a board of directors, an executive director, and a music director*. The main management body is the *Board of Directors*. It is an expression of a system in which the state has limited or even zero involvement in the decisions and operations of the institution. The Board of Directors includes individuals who organise the financing of the institution through sponsors (often themselves), advertisements or public projects. *The Executive Director* is responsible for the overall organisation of the institution, as well as for the selection of its staff (including artistic staff). The Executive Director also appoints an accounting department, which, according to a system that he or she sets up, allocates expenses and plans income within the budgets allocated by the Board of Directors, and also participates in fundraising for these budgets. *The Music Director* (or in some orchestras: Artistic Director) is a position that almost always overlaps with "Principal Conductor". *Unions*: In the United States, there are two main unions for musicians that have representatives in orchestras, the AFM and the IGSOBM.

Outside America

Despite the informal name 'American' model, this model is not unique to America, but is representative of privately funded institutions. Such institutions exist in many countries. The London Philharmonic Orchestra Although Britain is an island within Europe, the funding and governance model of most British orchestras is 'American'. The London Philharmonic Orchestra, founded as a company in 1932, changed its form of ownership and governance to a co-operative during the Second World War, following the withdrawal of the orchestra's major sponsors, and since then its board has included both business sponsors and patrons and musicians from the orchestra.

Summary: The forms of governance of an orchestra vary from country to country around the world because of different economic models, different histories of the arts, and different attitudes and support mechanisms from society and the state.

In the work "*Strategies for the Future of Orchestras*"³ the goals of a successful symphony orchestra manager are presented in four points: a). High quality concerts; b). Sold-out events; c). Enthusiastic audiences; d). Happy performers/staff.

To these perfectly chosen four points I would add four more which are in some way related to the first four: e). Financial stability/prosperity of the institution; f). Financial stability of musicians/staff; g). High public esteem; h). International prestige. Fulfilling these eight points is the whole philosophy of running an orchestra, regardless of the legal form of governance and management.

4.3. Reason for the existence of orchestras - the audience

Orchestra managers should always bear in mind that the performing arts **exist for their audiences**. The most important task of the management of any cultural institute is to develop its audience. Different orchestras and organisations are engaged in researching its interests and looking for the right approach to it: **to keep the audience** we have; to look for a way to create **new audiences**. The PhD thesis seeks answers to the questions: **what does the Philharmonic offer to the audience; why do audiences want or need to enter the concert hall** and listen to the respective works in the respective performances, if they can hear and see these works on the internet (the most common answer is the **social experience**); what efforts to make to introduce **the youth audience** to the performance of their art (such as the Fortissimo program, etc.); classical music as a genre is a **general aggregate of different types of music**, so it is important to **target the audience** for different types of concerts ; **crossover** projects, also concerts with **film music**; attracting new audiences through concerts with music from **computer games, etc.**

Orchestras today must be much more reflexive in order to attract and keep the attention of the listener, using modern technologies (streaming, video-on-demand), but also getting the orchestras out of the concert hall, through various projects such as flash mobs, interactions in public places with random passers-by, and so on. Various good practices will be presented and how they could be implanted in the Bulgarian reality, such as: the "**House of Music**"⁴ in Vienna; **youth amateur choirs and orchestras**; "**educational**

³ Rosu, Stefan. *Zukunftstrategien für Orchester*. Springer VS, 2014, p. 18.

⁴ <https://www.hausdermusik.com/museum/> accessed 07.03.2022

lectures" for adults; ways to **motivate** the listener to enter the concert hall; **the environment** - the qualities of the hall itself, the attitude of the staff, the aesthetics of the concert hall and the appearance of the performers, it is not accidental the expression **that the audience "listens with its eyes"**.

The dissertation discusses interesting ways of **advertising** and PR to attract audiences, with good experiences from institutions such as the Vienna Opera or the Scala di Milano. Examples are also given from Bulgaria, Germany and the USA, which orient us to the direction of the audience's interests, and which also show that audiences in different countries have different ways of thinking.

The results of the surveys conducted by the Sofia Philharmonic are a reason to make changes in programming and marketing to increase audience interest and awareness. Evidence is also given from surveys and studies in **Germany**, in the Baden-Württemberg region, in Heidelberg, Heilbronn and Roitlingen, the aim of which is to get a better idea of the interests of listeners; in the **USA** the results of a survey conducted shocked the researchers (motives such as "prestige and quality of the orchestra" do not even figure among the main reasons that make a concert-goer return to the hall. The element "availability of convenient parking" ranks first in the survey), etc. The conclusion of those running the survey is that **the declining audience is not caused by a lack of interest in classical music, but by a desire for a better overall experience**. In 2018 the **Sofia Philharmonic** did a short street survey among young people, which yielded interesting results. What the responses show is that **young people's lack of interest is not due to dislike, but to ignorance of the art**. The dissertation also contains other data.

Summary: The reason for the existence of the performing arts, and symphony orchestras in particular, is to serve/develop the needs of the audience. Audiences in different countries have developed different habits and needs because of the accumulation of essentially different traditions. For this reason, the approach to audiences cannot be standardised, and the development of an audience development strategy and the recruitment of new audiences should consider the specific circumstances in different places and the fact that the habits and priorities of audiences change over time, depending on the social environment. The management of the institution should periodically survey and analyse the tastes and priorities of its audiences, and adjust its audience policy

according to the results, working to develop its high taste while maintaining and increasing interest in the orchestra's activities.

4.4. Choice of repertoire and identity of the symphony orchestra

In order to attract audiences to the concert hall and to build an orchestra's image, it is particularly important to pay close attention to the repertoire. Most symphony orchestras around the world have a wide range of repertoire. This opens great opportunities, but at the same time it puts the management of orchestras in a very responsible position, because their repertoire policy depends on shaping the taste of society in the region in which the orchestra operates. The choice of repertoire also includes the choice of **performers** for the corresponding programme. But the role of the performers goes beyond the aspect of specialisation/profilisation and plays a much more significant function in the overall image of the orchestra. Several factors playing a major role in the selection of performers are presented.

4.5. Legislative framework for the management of the performing arts in Bulgaria

The State Cultural Institutes (SCIs) are established, transformed and closed by decrees of the Council of Ministers on the proposal of the Minister of Culture. The main laws for them are *the Law on the Protection and Development of Culture* ("LPDC") and the *Labour Code* ("LC"). The CCIs are subordinate state budget authorities and, as such, receive their funding from the Ministry of Culture (MoC), as well as partially from municipal budgets in the case of signed co-financing agreements between the respective municipality and the Ministry of Culture. The State cultural institutes define their own tasks, and to achieve their objectives, set out in the *Rules of Procedure*, which are established by the Director of the institution and approved by the Minister of Culture. They may also carry out additional activities, including economic activities. The dissertation presents the main laws that are directly relevant to the main activities of the SCI: A). **The Constitution of the Republic of Bulgaria** has texts that concern the arts directly. B). **Labour Code** - all employees have all rights and obligations arising from this Code. C). **The Income Tax Act** provides for a reduction of taxable income of legal entities in cases of donations to cultural institutes. D). **Personal Income Taxation Law (PITL)** where tax reductions are provided in cases of donations to cultural institutions. F). **The Added Value Tax Act** (VAT Act) has a major tax relief for cultural institutions - tickets for concerts and

performances are exempt from tax. E). **The Gambling Act** provides options to support culture. In December 2013, the Bulgarian Parliament decided that 10% of the taxes paid from gambling should be spent on culture. G). **The Copyright and Related Rights Act has been** harmonised with European directives. H). **A Patronage Act** to create new opportunities for cultural funding. (A factor hindering the operation of the Patronage Act is the *Anti-Money Laundering Measures Act* adopted in 2017.) I). **Law on awarding persons for outstanding services to the state and the nation.** J). In 2010, the Ministry of Culture took the initiative to establish a **Performing Arts Act** (to no avail so far). K). **Law for the Protection and Development of Culture.** L). **Law on State Property and Law on Public Procurement.** M). **Law on the State Budget**, where the financial framework for the activities of the Ministry of Culture is defined. When dealing with public funds, it is also important to comply with the provisions of the **Law on Financial Management and Control.**

Summary: There are disparities and a lack of harmonisation between the normative documents relevant to the development of cultural institutions. In the absence of a harmonised legal framework and in the absence of a law on the performing arts, a series of reform measures have been taken over the last 30 years in this obviously problematic management sector. The contradictions listed here could be commented on individually or in groups (at round tables, conferences or other public forums) in another text.

4.6 Financing of cultural institutions: private, mixed or public

The financing of cultural institutions is one of the most painful issues for artists and for their proper and successful management. Art alone can hardly be self-sustaining. Show business has proven over time that it can be self-sustaining under certain conditions. The Ministry of Culture proposed in 2019 a project on "**Strategy for the Development of Bulgarian Culture**"⁵.

A brief historical overview of the financial parameters of the various cultural institutions and their subdivisions was given, with a focus on their method of financing from 1969 to

⁵ Bulgarian Culture Development Strategy 2019-2029, p. 29.

2019. The conclusion of the historical overview is that there is currently **no clear picture of the long-term financing of culture** (and symphonic art in particular) in Bulgaria.

Three main types of funding for cultural institutions: (A) private funding; (B) mixed funding (public and private); (C) public funding (state, county, municipality). As mentioned above, in the United States of America, the private funding model is the main one; in Western Europe, funding is mixed - public and private; in Eastern Europe, until 1989, funding was exclusively public (several countries still prefer this model today).

(A) Private funding of cultural institutions

The thesis discusses this mode of financing in detail with conclusions. Data is provided for the symphonic arts in the United States with **annual revenues** of symphony orchestras in the United States of over **\$2 billion**. The total capital (assets) of U.S. symphony orchestras is about \$5 billion. Some indicators of the finances of the three most economically successful orchestras in the United States are examined. *Los Angeles Philharmonic, Philadelphia Orchestra, Boston Symphony Orchestra*. There are various advantages to this type of funding, the greatest of which is probably the lack of commitment to government policy and the autonomy in making decisions about the future development of the orchestras. As well as providing opportunities for development, private funding also poses various non-musical threats to the future of orchestras when activity and income collapse (as happened with Covid-19). The funding situation of several leading orchestras in the United States during the pandemic is also discussed, such as

Metropolitan Opera; New York Philharmonic; Philadelphia Orchestra; Baltimore Opera; Fort Worth Symphony; San Francisco Symphony; Chicago Symphony, where Riccardo Muti was chief conductor; Boston Symphony; Houston Symphony.

Summary: Private funding, provided with the necessary legal basis, has several advantages in a functioning economy, but in an economic crisis, culture is the first to collapse. For private companies, the first priority is to save themselves from bankruptcy, and public activity with a social focus is just a bonus in normally functioning financial flows. Taking care of society and the structures that guarantee the standard of living and

social development can only be the priority of a structure whose main objective is the maintenance and development of society, i.e. the municipalities and the state.

(B) Mixed financing (public and private funds) of cultural institutions

Mixed funding structures are of the greatest interest because this type of funding is the most natural that currently exists, combining the principles of (financial) stimulation of (economic and creative) development and (principled) security in the development and existence of the institution and the people working in it. In Europe, where classical symphonic art has the greatest tradition, mixed funding has been developed to an exceptional degree. Funding in Germany is discussed in detail, with data, figures and conclusions. In Austria, too, the provinces, unlike their possible counterparts, the districts in Bulgaria, have considerable autonomy, but they also have substantial budgets which they can allocate according to the rules of the regional ministries. The chapter provides information and a comparison of the ratio of public subsidy to own revenues and sponsorship of the largest European opera theatres with the Bulgarian state opera theatres, which in recent years have attempted a gradual transition from full public funding to a special form of mixed funding (public funding and own ticket revenues). In continental Europe, public funding exceeds 50%. Information is also provided on the Hong Kong Philharmonic - a politico-economically interesting case as a former British colony and, since 1997, a Free Administrative Region of China - a hybrid between different, often conflicting, models of governance and funding.

Australia also prefers the European funding system (a mix of public and private funding) to the American one (an entirely private model). Orchestral arts are concentrated mainly in major cities. The Australian government allocates funding to symphony orchestras according to its own criteria, and funding is not the same for all state orchestras. The Orchestra of the Australian Opera and Ballet Company has no external funding. It can be concluded that, even within a country, funding for different ensembles with the same legal status is not equal, nor is the allocation of funds within the annual budget.

Hazards of mixed funding

As with private funding, the economics of mixed funding for cultural institutions are highly dependent on the state of the 'market'. In a crisis, such as the financial crisis of

2008/2009 or the pandemic of 2020/2021, all pre-planned income from concert activity or sponsors/donors appears to be unfulfilled, leading to serious financial turbulence in ensembles. At the same time, the availability of state subsidies protects publicly funded orchestras from bankruptcy and closure.

Summary: In general, mixed funding does not protect orchestras from financial crises. However, it does ensure their survival and relative independence from the political decisions of local/state structures. Balanced mixed funding may be the most appropriate form of funding for symphony orchestras, allowing them to be economically and artistically autonomous.

(C) Public funding (state, federal districts, municipalities) of cultural institutions

In the case of public funding, we are talking about funding with public money - from municipalities, (regional) districts, (state) agencies or directly from the state in the person of its ministry responsible for the arts. This form of funding undoubtedly has its advantages and disadvantages, which become apparent in crisis situations. When the funding is 100% with public funds, we are not talking about institutions receiving these funds through programmes and projects, but about direct subordination/funding to the municipality/region/state. In Bulgaria, due to the specificity of the powers of the regional structures/management, there are no regional cultural institutes, only state (DCI) and municipal (OCI). **Cultural institutions with 100% public funding were typical in the so-called Eastern Bloc before 1989**, but they are not normal practice in the rest of Europe. It is still normal today in Asia (China) for boards to be under full political (state) control. Such are also found in other countries, mostly with political regimes that **aim to control the development of the arts**. In these cases, the state also takes over the financing of the subordinate institutions. After 1989, a slow process of decentralisation in the arts began in this country, but this process was halted by the post-2010 reforms. For the state, in its role as the main patron, art is not part of a cultural industry, but a social tool to improve the standard of living and/or to promote various (cultural) policies.

Hazards of public funding

Given the absolute dependence of cultural institutions on political parties (which are at the heart of the state's governance), the possibility of art/music becoming a tool for

political ends is very real (and has been used over time). (In the USSR, this was a very regular practice, with composers such as Prokofiev or Shostakovich coming under attack). Another real danger is the lack of motivation to develop, which is common when basic needs are fully met.

Despite the relatively high degree of autonomy of the creative and administrative activities of the state cultural institutes, in practice they are absolutely dependent on the limits set by the Ministry of Finance in the CEBRA for the first-level authorising body, the Ministry of Culture. The reason why the State cultural institutes find themselves in situations of late payments to artists, despite the availability of revenues which in practice cover their fees, is the lack of a sufficient limit on expenditure at the time.

In Bulgaria, artistic, administrative and economic power in the institutes is concentrated in the hands of one person, who in most cases has no economic education. For this reason, the system of electronic bank payments seems to protect the state budget from errors in the chain.

Summary: Public funding (100%) provides security for cultural institutions, especially in times of crisis, and, with appropriate policies, ensures their long-term existence, regardless of the economic turmoil in society. At the same time, there is a real risk of marginalisation of ensembles. Moreover, in the current system, which lacks financial autonomy, the economic difficulties of a cultural institution can have a significant impact on the activities of the other institutions in the system. Outside the specific financial conditions, with total financial dependence on the political management of the state, there is the possibility of imposing censorship and turning art into an instrument of political propaganda.

4.7. Possible solutions to the problem of working hours of staff in symphony orchestras

This part of the thesis deals with the issue of musicians' employment (working hours) as regulated in the Labour Code, which includes creative positions such as musicians, actors, ballet dancers and so on. The problems in this situation are several: the length of the working day and working hours; the duration of rehearsals; the branch contract of the musical and performing arts in this country and worldwide.

Detailed information is provided on the definition of working hours and the payment of orchestra members by *dinsts*, depending on the different groups in the symphony orchestra (as in Europe). In various Bulgarian orchestras before 1989 there was a similar internal (or unofficial) practice of equalising the workload among musicians, called the "point system". In Europe, the unions fight for longer holidays (more rest in the summer) because all orchestras work on permanent contracts, with year-round salaries and insurance. In America (USA) most orchestras are fighting for less holidays (summer) because they are not paid. This means that orchestra musicians are not insured during these periods and do not have a regular salary. In America, the working time of orchestra musicians is also measured in a similar way to *dinsts* (services), with a weekly calculation period. Examples are given from the contracts of various orchestras in Austria: the Vienna Symphony Orchestra, the Graz Philharmonic Orchestra, the Bruckner Orchestra in Linz, the Mozarteum Orchestra in Salzburg, the Tiroler Symphony Orchestra in Innsbruck, the Vienna Philharmonic Orchestra, the Austrian Radio Symphony Orchestra (RSO-Wien). Poland, which has followed the Bulgarian path, also has this system, albeit in a different version. There are also examples from Germany, where there are currently 129 publicly funded orchestras. In the UK, these include the London Symphony Orchestra, the BBC Royal Opera (Covent Garden) Symphony Orchestra, the National Opera of Wales, the Birmingham Symphony Orchestra, the Royal Liverpool Philharmonic Orchestra, the Royal Scottish National Orchestra, etc.

Summary: It is clear from the above examples that the predominant calculation of working time in the performing arts worldwide, and in some cases in orchestras, is not the normal daily hourly rate for most professions, but in performances/services/units. Workloads in the performing arts are difficult to compare, not only with other professions, but even between professions within the performing arts themselves.

4.8. Wages of musicians in a symphony orchestra

The financial relationship between the orchestra and its musicians can be divided into four broad categories: **professional** (paid); **amateur** (unpaid); **orchestra academy** (charged a fee); **youth orchestras** (with/without a fee, purpose - training).

This thesis looks at professional musicians from a practical point of view. In the contracts of orchestra musicians, whether they are paid on a participation basis (civil contract),

seasonally (civil or employment contract) or permanently (employment contract), remuneration is linked to the work performed. The main difference between civil contracts and employment contracts is that in civil contracts the remuneration is for the task/work performed, whereas in employment contracts the remuneration is for presence. In recent years in Bulgaria, despite the provisions of the Civil Code, the first group of professional musicians has been reduced.

To avoid speculations about the ratio of the Sofia Philharmonic's salary rate to the national minimum wage (NMW), the management of the cultural institute introduces from the beginning of 2024 a new way of calculating the lowest starting basic salaries by means of coefficients for the different positions in the ensemble, borrowing the model from the BCCT.

What is the meaning of the Philharmonic management's proposal: The setting of a minimum basic salary of 200% of the national minimum wage provides a guarantee of salary stability, which would not depend on the subjective decision of the director but would be based on the minimum wage set by the Council of Ministers for the year in question.

How is the ratio formed: As can be seen from the comparison with the BCCT (branch collective agreement), the idea of the proposal is to introduce a ratio between the wages in the Sofia Philharmonic to the wages in Bulgaria, which would not be based on trade union demands, but would be increased in relation to them, in order to be similar to the ratio of wages in countries with a developed orchestral culture, in relation to their standard of living.

What is the result of such a linkage?

The salary of a musician in the Sofia Philharmonic is not competitive with the salaries of musicians in similar institutions in the countries of Central and Western Europe, given the lower standard of living in Bulgaria, but the main idea is to have it in a similar ratio to other professions and to the standard of living in Bulgaria, as the ratio of the profession in other countries.

Data is available from orchestras around the world on how they pay their musicians, such as the **Chicago Symphony Orchestra** and the **Berlin Philharmonic**. Looking at the

annual accounts of different orchestras around the world, one is struck by the different approaches to budget allocation. To understand the overall picture, one can look at the analyses carried out by the *International Federation of Musicians* in 2008 and published as the *International Survey on Orchestras*. This comprehensive survey, covering various aspects of the creative, economic and administrative activities of orchestras, covered a total of 164 orchestras from 24 countries in different parts of the world. The analysis of orchestra budgets shows that, on average, 54% of the annual budget is spent on salaries.

Summary: The salaries of musicians in different orchestras can vary according to the type of contract, the number of musicians employed and the overall artistic and economic activity of the orchestras. There is no fixed relationship between the salaries of orchestra staff and their total budget. For the largest proportion of orchestras (34%), the FFR is between 41% and 60% of the total budget. Overall, some 74% of orchestras have salaries in the wide range between 21% and 80% of the total orchestra budget. These wide variations in financial envelopes give the impression of a lack of established regulation in the budgeting of this type of institution, due to the different objectives of cultural policy and the different economic levers of public institutions in different countries.

4.9. Evaluation criteria for symphony orchestra employees

In the period 1944-1989, an interesting way of ranking state orchestras was used in Bulgaria - by means of *State Symphony Orchestra Reviews*. The first one was held in July 1948 and the last one in November 1989. These reviews constituted a kind of symphonic music festival in Bulgaria Hall, in which each orchestra presented one or more concerts under the direction of its conductors.

Such a way of evaluation is subjective, but the effect on the audience is serious; due to the specificity of the event, each orchestra tried to show the maximum of its abilities. The first problem with artistic evaluation is the **impossibility of being unbiased**. Which is the better orchestra, Vienna Philharmonic or Berlin Philharmonic? Or the Concertgebouw? And the New York orchestra? Second problem is **who is to be appraising**? Anyone could be accused of bias. Especially if we don't like his evaluation... Third - **by what criteria is it going to be evaluated**? Number of *kicks*? There are phenomenal recordings of the Berlin Philharmonic from the first half of the twentieth century under Wilhelm Furtwängler that are full of technical errors. Fourth - the **acoustics of the halls** also hinder

objectivity in any evaluation. Fifth problem - the **different repertoire ideas** of the managements. It is very difficult to judge the quality of an orchestra by its repertoire, as the criteria for selecting works are many. A sixth problem is the level of **work of the conductors**, which can also mislead a committee about the capabilities of the ensembles. One could continue in this direction, but one thing is clear - artistic evaluation would always be controversial.

How does the Ministry of Culture in Bulgaria deal with this situation when evaluating artistic ensembles? Every year the ensembles receive the so-called *Complex Evaluation*. This evaluation is mainly related to the administrative and financial aspects of the ensembles' activities, not to the artistic level of the artistic units. In other words, it is not how beautifully and perfectly the music is performed that is evaluated, but the domestic part of the institutes' existence. **The comprehensive assessment of the Ministry of Culture does NOT evaluate the artistic level of the ensembles**, but the existence of a stable audience, the repertoire and the financial situation. In this sense, it is an **administrative attempt to define the overall NON-artistic state of the institutes**. The assessment of artistic level is left to the audience and the personal conscience of the musicians and their directors.

The questions based on which the comprehensive assessment of the state music institutes in the country is made, as of 2019, are divided into five sub-groups: 1. Management activity; 2. Financial efficiency of production; 3. Management of facilities; 4. Artistic politics; 5. Presence of performing arts institute in the community according to the following criteria. In addition to the comprehensive evaluation, the different types of performing arts institutions have their own minimised evaluation system, which for symphony orchestras includes the following seven criteria, called "natural indicators": number of audience members, number of concerts, ticket revenues, concerts for children, programmes of Bulgarian works, participation in festivals and tours abroad, and percentage ratio of ticket revenues to expenses.

Summary: The analysis of the criteria and their fulfilment by the various orchestras and other cultural institutions would be much easier if the Ministry of Culture's website had some clarity and logic in the input of information, but the administrative problems at the MC are not the subject of this study. Of the two possible models for evaluating the

Ministry of Culture, and for the reasons given above, it is clear that **there is no criterion for quality of performance.**

In short, the criteria used are not "important" to our momentary experience in the concert hall but are things that make that experience possible.

Perhaps the most famous ranking is that of the British magazine *Gramophone*, which brings together prominent critics from the world of classical music to produce an annual list of the 'best'. A universal criterion for judging symphony orchestras is hard to define.

Integral criteria for classifying (or evaluating) orchestras: Musicians' Wages; Musicians' Employment; Working Hours; Method of Financing; Position of the Orchestra; Management - Manner of Governance; Politics; Operational Objectives; Origin of the Orchestra; Ownership; Composition (Size); Status.

Summary: This classification is a personal view of the criteria and groups by which the various orchestral instruments can be classified. It may come into use in the future. A manager needs to have an overview of the main instruments and qualities of his orchestra and the institution he manages, to have a clear idea of the main activities, the desired quality of the cultural product produced, and a vision for the future - development and prospects.

CONCLUSION

The aim of this dissertation is to shed light on the history and thus the current situation of symphony orchestras in Bulgaria, focusing on the state of the Sofia Philharmonic. Some innovative aspects and organisational practices of the best European and world philharmonic structures are borrowed, and an attempt is made to implant them in the Bulgarian musical-cultural environment to bring about organisational change by improving the management of symphony orchestras.

The research objective thus formulated has been achieved by carrying out the tasks presented below: 1) To provide a theoretical basis for the structure and management of symphony orchestras. 2) The origins and development of orchestral art in Bulgaria are traced and analysed with a historiographical approach. 3) The state of orchestras and the development of musical (symphonic) institutions in Bulgaria has been examined. 4) To critically review cultural reforms in the performing arts in Bulgaria. 5) The structure and

management of the Sofia Philharmonic Orchestra (as of 1 January 2020) is presented and analysed. 6) A model of the importance of strategy as a factor influencing the performance of symphony orchestras to be part of the cultural industry and to have a social and public activity is proposed and analysed. 7) A legal framework for the management of performing arts in Bulgaria is defined. 8) Integrated criteria for the evaluation of the symphony orchestra in the country are presented, from which the ways of its financing and management as a cultural institution can be derived.

The main conclusions of the respective chapters of the study provide evidence for the accomplishment of the set tasks.

1. According to the reviewed facts, regardless of their status and funding (in the West mainly municipalities, regions and sponsors, in the East - the state), today most orchestras bear their name by tradition, without making a serious difference in the meanings of the words "symphonic" and "philharmonic". However, according to many music experts, the term "philharmonic" has a different status and position in musical and social life.

It has been proved that the term "symphony orchestra" is a generic term and "philharmonic orchestra" is always part of a name.

2. Although rare, there are philharmonic orchestras with only a chamber orchestra. When this subject has come up for discussion among musicians, they have often rightly resented the fact that philharmonic orchestras are not composed of amateurs. The answer, however, lies in the context (the intended meaning) of the words - they are amateurs, not because they are not professionally good enough, but because they do what they love. At least that's the case with the people who founded the philharmonics. In the words of a representative of the Berlin Philharmonic, to be a "philharmonic" you really have to love music.

3. Today, the terms "*symphony orchestra*" and "*philharmonic orchestra*" mean the same thing to most people - a large musical ensemble of classical musicians performing symphonic music. The two names are also used to distinguish ensembles of the same type in the same place. The origin of the ensemble and the aims of its founders can be deduced from the term used.

4. In addition, however, the word '*philharmonic*' is more loaded with content, it can be used to denote a cultural institution for the organisation and dissemination of concert activity, it can also be the name of a concert hall. Similarly, while the term 'symphony orchestra' is unambiguous, a 'philharmonic' can include various formations - symphony orchestra, choir, youth, chamber and other ensembles.

5. It can be assumed that the term "*symphony orchestra*" represents a performing ensemble, and "philharmonic", according to the tradition of the word in the respective country, is in many cases an organisation for the implementation and promotion of concert activities with a wide range of genre repertoire and performing ensembles.

6. The word '*reform*' should not be synonymous with '*downsizing*', but with changing the way the system operates in the light of global and regional trends, and without ignoring the historical and cultural particularities of the regions concerned. A change which would give a new impetus in the old direction or in a new direction, along new paths or by new means! The term "Reform" should be inextricably linked to "Innovation". For if there were no innovation, there would be only simple reproduction of old forms. And such action is formal and not conducive to long-term positive results.

7. A broader interpretation of the term "innovation" is an idea used for the first time by an organisation or group of organisations with a common purpose and activity to turn opportunities into reality more quickly and more effectively. In the world of cultural organisations, this means: properly organised costs, increased interest and attendance, increased income, but also a richer repertoire, more diverse performers, a higher artistic level, educational and social activities and a high profile in society. This should be the point of a reform, i.e. what has been lacking in our country.

8. Before thinking about the reform of the performing arts in Bulgaria, a clear definition of the terms cultural industry and cultural policy should be sought. What should guide the reform of the sector is a clear vision of the desired results.

9. The main ideas for reform, based on a working national cultural strategy, should include clear ideas on the following four points.

10. After the adoption of the Cultural Development Strategy of the Republic of Bulgaria, reforms should be discussed on the basis of the set long-term strategic goals. In the case

of the performing arts, the question of what is expected of the cultural sector in the following aspects should be answered (i) building an "entertainment" sector; (ii) building a way of thinking and behaving in society; (iii) creating a special stratum in society; (iv) promoting certain ideas; (v) building resistance to certain social phenomena; (vi) creating options for a cultural "outlet"; (vii) building a cultural industry; (viii) national image and national self-esteem; (ix) what and how structures are needed to achieve the various objectives, i.e. public institutions, private and independent structures.

11. The most appropriate form of: fixed or variable public funding; project funding; mixed funding; private funding or combined mixed co-financing should be applied to the relevant cultural policy structures.

12. In the public sector, which for objective reasons could be the most stable, with a clear vision of cultural policy, reforms should be based on the following eight lines of development: (i) optimising expenditure; (ii) increasing income; (iii) reaching larger groups of users; (iv) a richer and more varied repertoire; (v) supporting artists with distinctive profiles and high professional qualities; (vi) striving for the highest possible artistic level; (vii) permanent educational and social activities; (viii) ensuring a broad public impact and supporting the achievement of a high national image.

13. The planning activities of concert event management can be summarised in the following steps (1) Answering the question "What do we want to achieve with live music?" is the first condition for finalising a successful concert. The best live music events have a concept that shapes everything from the type of music performed to the audience, venue, other event activities, decor style and merchandising. A quiz with several members of the target audience is a good way of checking whether the concept is exciting and engaging. (2) Budgeting is a preliminary activity to have enough funds for expected and unexpected expenses and possible profits. (3) This requires a clear plan. The main item in the budget depends on the image of the talent who will be invited to star in the event and who will create the atmosphere of the symphony concert. (4) Like any other event, the promotion of the concert is directly related to its success. (5) A marketing plan is needed that takes into account the concept of the event, the audience and the musical talent invited to tour. If the talent has certain channels that work well for their own marketing, they can master the channels to promote the concert. (6) Partnering with the soloists is the key to

success. (7) You can increase the reach and spread the message further by using partners for the event. Sponsors, merchandisers, promoters, ticket sellers and the venue can all help with marketing. (8) The concept and objectives of the concert (show) should be placed on a media page to facilitate promotion. (9) Providing the venue manager with access to social media, email and printed materials is another valuable resource and another important requirement for success. (10) Capturing high quality photos and video before and during the event is a promotional strength and provides an opportunity to turn the performance (concert) into a series, loop or repeat opportunity the following year.

CONTRIBUTIONS OF THE THESIS

Contributions of cultural-managerial nature

1. It is argued that the work of the symphonic musician has a dual character - on the one hand it is a personal resource and at the same time it is the capital of the organization that is interested in developing it. The symphony orchestrator or soloist achieves three types of results (musical, economic and socio-cultural) as he carries out his activity in an organisation where the results are also measured in these three areas.
2. To systematise a set of integrated criteria for the evaluation of human resources in symphony orchestras in our country, from which it is possible to derive ways of financing and managing them as part of the cultural industry with socio-social activities.
3. It is justified and proven that, despite the diverse and complex nature of the work of symphony musicians, it is subject to management, the results of which can be significantly improved through the application of appropriate methodological tools for training and developing their abilities for individual, and therefore organisational, change.

Contributions of an applied nature

4. The development of the symphony orchestra as a part of the performing arts from the Liberation to the present is presented historiographically. The line drawn in the dissertation is supported by evidence, and possible further paths for its growth as a musical and social instrument are shown, using the experience of various professionals in the field, but also that of the national orchestra of Bulgaria - the Sofia Philharmonic.

5. A critical analysis of the cultural reforms in the performing arts in Bulgaria. A legal framework for the management of the performing arts in Bulgaria is defined.

6. A model of the strategy of the Sofia Philharmonic Orchestra (national symphony orchestra) and its importance as a factor influencing the performance of symphony orchestras in general and as part of the cultural industry of the country (in this case the Republic of Bulgaria) and the region in Europe and the European Community (possible future influences in the expansion of the philosophy and practice of the cultural activities of the institution) is proposed and tested. This large-scale and important activity has a social and educational character and could be an example for similar orchestras, based on the overall work of the Sofia Philharmonic.

7. The conclusions drawn, the array of information presented, even the examples and practices given, the data and interviews suggested in the appendices, can be the basis for further scientific and applied research in the field of orchestral work and management.

PUBLICATIONS ON THE THESIS

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2. Todorov, N. (2023). *Approbation of a Model of the Importance of Strategy as a Factor Influencing the Performance of the Sofia Philharmonic Orchestra*, in Collection of Scientific Studies with Authors' Collective, "Development of Regional Social Ecosystems in the Conditions of Digital Transformation", Scientific Editor: Assoc. Dr. Svilena Ruskova, reviewer, Prof. Dr. Veselina Ilieva, Shumen University "Chernorizets Hrabar", Primax **Publishing House** , 2023, ISBN 978-619-7242-99-7, Printed by Academic Publishing House of Rusen University, pp. 5-29.

3. Todorov, N. (2019). *The Symphony Orchestra Machine*, in Journal of *SymphonyOrchestra* . Artisanin, no. 19, 2019, ISSN 2535-1273, pp. 19-38, ed. Г. Dyulgerov