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Adult Education and Education Policy in Bulgaria (2nd edition, 2007)

Institute for International Cooperation
of the German Adult Education Association
(*dvv international*)

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International Perspectives in Adult Education

The reports, studies and materials published in this series aim to further the development of theory and practice in the work of the Volkshochschulen (VHS) as it relates to international aspects of adult education – and vice versa. We hope that by providing access to information and a channel for communication, the series will serve to increase knowledge, deepen insights and improve cooperation in adult education at an international level.

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Cover picture

In the ninth century, the Emperor of Byzantium despatched Christian monks on a mission to the Slavs. Their monastic names were Cyril and Methodius. They were brothers, who had grown up near Thessaloniki, and they therefore knew Slavonic as well as Greek. Cyril had invented a new alphabet that was better suited to the Slavonic languages than the Greek or the Latin. Using this alphabet, the missionaries were able to put across the Bible and other sacramental texts in a form that could be understood by the Slavonic tribes, even though this differed considerably from their everyday speech. This form of language is known today as “Old Church Slavonic”. It is closely related to the modern Slavonic languages, especially Bulgarian.

Cyril and Methodius are still honoured in Bulgaria as the “apostles of the Slavs”. Their disciples, who sought refuge in the Bulgarian Empire when the mission came to a violent end, created centres of learning there, in which they carried on the Slavonic written cultural tradition begun by Cyril and Methodius. Both young people and adults were taught in these schools, although it would be an anachronism to speak of an early form of adult education. Nonetheless, the part that Cyril and Methodius still play in the Bulgarian consciousness makes them appropriate patrons of adult education and *Lifelong learning* in that country.

The cover picture shows the monument to the two saints outside the National Library in Sofia. In their hands they are holding a roll with the Glagolitic alphabet created by Cyril.

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Preface

Before Bulgaria joined the EU, visitors in Sofia, strolling around the former king's palace, were struck by an illuminated digital advertisement on one prominent façade. This told every passing pedestrian and motorist that Bulgaria's membership of the European Union was only a matter of days away. The date of accession had been set as 1 January 2007, and, indeed, Bulgaria then entered the Union, despite some criticism that the country does not meet all criteria in a satisfactory way.

Membership of the EU is also an important topic for adult education in Bulgaria. For years, governmental, civil society and university organizations have been playing a successful part in the EU programmes and projects that go by the sonorous names of Socrates, Leonardo and Grundtvig. Through the prism of Lifelong learning, these provide support for general and vocational education initiatives without which much-needed social and economic developments in Bulgaria will not happen. They also call for and encourage improvements in adult education policy, legislation and funding.

European cooperation in adult education extends beyond the Member States of the EU. The European Association for Adult Education therefore now targets the 44 states of the Council of Europe, which Bulgaria joined in 1992. Bulgarian partners play an active part in EAEA's work of providing information and lobbying (www.eaea.org). They are also joint members of the Network for Intercultural Learning in Europe (<http://Grundtvig.euproject.net/NILE>) and are involved in the project developing the modules for the new Bachelor's and Master's courses in adult education as part of the Bologna Process for the reform of higher education (www.teach.pl).

Bulgaria became involved early on in the work of *dvv international*, the Institute for International Cooperation of the German Adult Education Association, with partners in the individual countries of Central and South East Europe (www.dvv-international.de). When regional cooperation was given further prominence in the wake of the Stability Pact for South East Europe, Bulgaria's crucial position was recognised in the siting of the *dvv international* Regional Office in Sofia. Since then, a large number of well-coordinated activities have been conducted year in year out, covering all countries in the region and ranging from literacy for Roma to non-formal vocational continuing education and training.

Of particular note are the history workshops dealing with the recent past, projects in which the focus has been on human rights and tolerance in democratic development, not to mention more labour-market oriented provision such as languages certificates and Xpert Business Skills (www.iizdvv-bg.org). The Regional Office has been supported in this work by the extensive Network of Adult Education in South East Europe (www.inebis.org) while the regional significance of learning festivals in the individual countries can scarcely be overestimated.

The collaboration between the Institute and its partners in Bulgaria and the South East Europe region receives financial support from Germany through the Federal Ministry of Economic Cooperation and Development (BMZ) as part of its contribution to the development of the social structure, and through the culture and education policy of the Foreign Office. While recognising and expressing our grateful thanks for this support, we –and our partners– urgently hope that adequate support for this important process will continue for some years in order to strengthen EU integration.

The authors deserve our warmest thanks for their well-researched and highly readable country study, which fills an important gap in our series “International Perspectives in Adult Education”. The informed view of adult education in Bulgaria which it provides will prove extremely valuable to those in neighbouring countries for the purposes of well-informed exchange and dialogue. This volume complements those already available on Macedonia and Slovenia, and enables the first steps to be taken towards a comparative assessment. Other partners and authors may be moved by this example to add further country monographs from the South East Europe region to this study on Bulgaria.

The English edition went to print about one and a half years after the German edition had appeared. It has been revised and updated with information on the most recent development.

The writing, production and indeed the distribution of such a book requires much commitment, and mental and physical attention to detail, before it reaches the reader. Thanks are due to all those who have contributed to its appearance in their various ways: we hope they will be pleased with the result.

Bonn, April 2007

Prof. (H) Dr. Heribert Hinzen

Introduction: Adult Education, Peace and Democracy

South East Europe – a Region in Transition

For the states and societies of the Balkan peninsula, the prospect of joining the EU has become, since the 1990s, a pointer for their social and economic development. In some countries however, particularly in the Western Balkans, this development is still hampered by the consequences of the civil wars that disrupted life in the early 1990s and destroyed established institutions. In other countries, incomplete or tardy transition hampers adaptation to European living standards.

At the political level there is an overt willingness to collaborate with neighbouring states in the region. This is to some extent a consequence of the desire to join the EU. People, however, have not yet entirely accepted or adopted the principles of market economy and democracy as guide for social development. One crucial point is how to interpret the past. Historical traditions that accentuate the national or even the nationalistic continue to affect the way in which large sections of society in South East Europe think and act. There are some cross-border initiatives aimed at fostering historical and political understanding, but it is difficult for them to gain a broader recognition. People who have lost their social status tend to regard themselves as victims of political and historical events. This is hardly fertile ground for overcoming deep-seated national myths.

Other factors obstructing the development of stable civil society institutions are widespread corruption and organized crime, which have considerable influence on policy-making in many countries of South East Europe, not just at national level but more particularly in local politics. There are also unresolved questions such as the status of Kosovo, the return of refugees to the areas where they used to live, the place of national and ethnic minorities and, of course, the role of Islam in Europe.

One significant cause of instability in parts of the region is the difficult social situation in which many people find themselves: jobs are often hard to come by, and in rural areas prospects are particularly bleak because of lack of funding for the creation of all forms of infrastructure, which was always poor and was further damaged by war. Besides the generally very high unemployment among young

people, the reintegration of former fighters into civil life places an especially heavy burden on those areas affected by war.

In this context it is vital to explore the historical background to past armed conflicts in order to prepare the ground for dialogue between cultures and religions, for tolerance, peaceful coexistence and reconciliation. Alongside vocational training and the teaching of key skills, this is a core aim of adult education establishments. They believe that however necessary vocational training may be, it will only bear fruit if society as a whole is democratic and is accustomed to resolving conflicts by means other than force – in other words, if it functions as a civil society.

Developments in the Field of Education

In almost all countries in South East Europe (SEE), governments largely withdrew from adult education after 1990, either due to the fightings or as a result of the fall of communist regimes. Thus, organizational and financial support to adult education sank to a minimum. Then, under the influence of the international community, reforms have subsequently been introduced to adjust education systems to the requirements of democratic societies.

One main reason for this has been the wish to do something to ease unemployment and stimulate the economy by promoting preservice and inservice vocational training. Providers of education and training urgently need support if they are to concentrate more on teaching key skills and entrepreneurial thinking. These key skills are nothing out of the ordinary – merely the ability to use a computer and to speak foreign languages. Existing courses need to be further enhanced in terms of quality and skills taught in order to respond to the demands of the labour market.

The notion of Lifelong learning, which is discussed throughout Europe and combines personal development, general education and vocational training, is gaining increasing recognition in SEE countries. But governments lack the money to establish adult and continuing education firmly as a tool of social integration and the civil society. This particularly affects access to educational provision by disadvantaged groups of the population, since educational establishments have so far

generally had to restrict their provision to commercially profitable subject areas for groups of clients able to pay.

There is still an urgent need for expansion in the training of multipliers and for professional dialogue in the areas of democratization and intercultural learning, in order to reduce the continuing potential for ethnically and religiously motivated conflicts. Adult and continuing education is of great importance in this context. In cooperation with civil society organizations, religious communities and other social bodies, it can offer educational means of helping to overcome prejudice, to foster acceptance of other cultures and to establish a universal understanding of history – a major prerequisite for any lasting reconciliation in the Balkans that is accepted by society. For the foreseeable future, support will still be needed from international organizations and the European Union. However, there are good prospects that the changes inaugurated through a wide range of projects will continue and that it will be possible to link them with other initiatives at transnational and civil society level so that a sustainable framework is created which will help to stabilize societies and to tie them into a common Europe.

The Work of *dvv international* in South East Europe

The Institute for International Cooperation of the German Adult Education Association (*dvv international*) has been involved in projects in South East Europe since the early 1990s. Its overall objective is to support local adult education providers, to help modernise existing structures of vocational education and training and to disseminate the EU policy of Lifelong learning. There are project offices in Albania, Bulgaria, Bosnia-Herzegovina, Macedonia, Romania, Serbia-Montenegro and Kosovo. In the case of Croatia and Slovenia, there are framework agreements with adult education umbrella organizations. These are associated with the “Adult Education in South East Europe” project (EBiS)¹, set up under the Stability Pact for South East Europe. The aim of EBiS is to develop lines of cooperation in the region in order to make use of the potential of adult education to develop the social structure.

¹ www.inebis.org

Bulgaria: Poor but Stable?

By contrast with the crises in the Western Balkans, where conflicts and power struggles are sometimes still being fought out along ethnic and religious lines, Bulgaria has remained “remarkably unremarkable” since 1989. In recent years, the average Western citizen was probably only aware of the country as a cheap summer holidays destination, and because it chose as its Prime Minister in 2001 a man who bears the name Sachsen-Coburg-Gotha and was actually King when he was six years old. Another event that has made Bulgaria slightly more known in the West was Bulgaria’s joining the EU. However, Bulgaria so far has been spared the conflicts between differing linguistic and cultural groups that have blown up in neighbouring countries – and it has therefore usually received little media interest.

Even compared with its northern neighbour Romania, Bulgaria has remained a quiet backwater. This was in fact the case before the change of regime. Although Bulgaria had until 1989 been ruled for decades by a kind of oligarchy in communist clothing, the Živkov regime did not resort to the kind of monstrous acts seen in Ceaușescu’s Romania. In Romania, its 20 million people were literally starving while Ceaușescu more than exhausted the state budget, already hampered by a zero debt policy, with his gigantic building projects. In Bulgaria, life in the 1980s was relatively comfortable by comparison with Romania, as long as one went along with the ideology. For city dwellers, a washing machine, a television, a summer holiday by the sea and skiing in winter were more the rule than the exception. Almost everyone lived within their own four walls. Employment, health services and care for the elderly were guaranteed. Under these conditions, most people were relatively comfortably off, and the country remained generally outside the public consciousness in Western Europe. One exception was the panic-like exodus provoked by the Živkov regime in the mid-1980s, when it placed pressure on the Turks living in Bulgaria through the compulsory Bulgarianization of their names and other measures. For a while, Bulgaria hit the headlines in an unpleasant way. However, this occurrence can also be interpreted positively as demonstrating the presence of mind of all sides, in that the wave of emigration set in train by those in power did not result in widespread disturbances. Even the emigration soon turned into re-immigration, and Bulgaria still prides itself on its so-called “Bulgarian ethnic model”. This refers to the fact that the different population groups –chiefly Bulgarians, Turks and Roma– live side by side peaceably

and without apparent problems. The Turkish minority even has its “own” political party, the “Movement for Rights and Freedoms”. Admittedly, it is not defined in law in ethnic terms, and may not be so defined by virtue of the Constitution, but it is generally regarded as the “Turkish” party. It wins seats principally in those areas where many people speak Turkish and look back to Muslim traditions within their families. Since it was set up, the party has continually been part of the majority grouping in the formation of governments, so that it is sometimes said that the “Turks” are well integrated politically in Bulgaria. The Turkish party may be criticized for its heavy reliance on the personality of its leader, Ahmed Dogan, or suspected of improper use of resources from the Agriculture Fund, but it has been regarded (at least by foreign analysts) a stabilizing factor so far.

In respect of foreign policy, relations with Macedonia may give rise for concern, since there is much eager discussion of the “Macedonian Question” (particularly over bar-room tables). The point at issue is whether Macedonian is in fact a dialect of Bulgarian, and whether the area governed by the Macedonian state should today form part of Bulgaria, if there were any political and historical “justice”. But this is scarcely more than a set-piece historical and philosophical debate. Politically, it is entirely without relevance since Bulgaria as a state makes every effort to work in harmonious partnership with its smaller neighbour. Despite the ever-present nationalistic rhetoric about Ottoman rule and talk of the old dream of “Bulgaria of the three seas” (Black Sea, Aegean and Adriatic), it is inconceivable that the country could enter into any aggressive conflict with its neighbours, especially since it joined NATO in 2004.

Economically, there has been an upturn since the low point of 1996/1997, when the socialist government of Žan Videnov let the national finances drift into hyperinflation. In recent years, growth rates have been pleasing with around five per cent per annum, promising eventual parity with the “old” EU states. For years, one hotel after another has been built in the seaside tourist resorts. The trees in the tranquil parks of the hotel villages of the socialist era may have been cut down, with unpleasant consequences for the quality of the surroundings in the tourist resorts, but the boom still continues, at least for the present. Western companies are investing in Bulgaria. This is sometimes at the expense of jobs in these companies’ countries of origin, but the development is beneficial for the Bulgarian communities where bathroom tiles, car doors or refrigerators are now being produced. Especially Sofia, the Bulgarian capital, situated much to the

West, has become, in 2006 and 2007, a boom town, with rising wages, an unexpected shift of population and an alarmingly under-controlled building activity. Connected to the EU accession, billions of euros are being transferred into Bulgarian economy.

A disadvantage for Bulgaria has been, in some respect, in recent years the remoteness of the country (at least as seen from Central Europe). The collapse of Yugoslavia and the fighting there practically hampered contact for years, and even now, after the violence has ended, it is not staying in Bulgaria that is the real “Balkan experience” but getting there. The poor condition of the railway between Belgrade and Sofia goes without saying. Nor is there a continuous motorway from Sofia to Belgrade. In the border areas, road and railway wind through a romantic rocky valley with quaint tunnels that may offer tourists a welcome diversion from the tidiness of average EU countries, but they have little to do with the modern requirements of rapid communication between capital cities. Anyone who has driven the route by car will have discovered at the latest by the Kalótina border crossing what lorry queuing means. Not to mention the impressive things one can learn about cigarettes, bribes and smuggling when crossing the border by train.

Despite the steady economic growth, Bulgaria is the poorest country in the EU. Most economic indicators are worse than even in Romania, at least officially, since measuring is sometimes tricky. An example is the average income. Official data says that an average wage in Bulgaria was about 180 Euro a month (in 2006). However, statistical data are based on work contracts. In the private sector, contracts very often are signed with the minimal wage provided by the law. Real payment, in cash, is usually much higher. Such wide spread systems to save taxes and social contributions make statistics unreliable. They have, most recently, even made the EU issue a regulation for some lifelong learning programmes, according to which a maximum eligible daily rate for a Bulgarian project manager is 34 Euro, but a Romanian 115 Euro and a Turkish even 158.² This does not match real living costs in Bulgaria, and especially in Sofia.

In every case many Bulgarians still need a second income if they are to get by. Even in Bulgaria it is hardly possible to live on a monthly income of 180 euros (or less, since 180 is an alleged average) – let alone buy medicines or pay the doctor

² http://ec.europa.eu/education/programmes/llp/call/part2_en.pdf

in hospital to speed up the chance of an operation. Personal contacts are still more important than institutionalized trust in the civil service or the judiciary – and how can this trust be created if existing personal ties work better? There is also an unmistakable and growing gulf between rich and poor. Innumerable brand-new four-by-fours pound through the streets of Sofia, while old women rummage through waste bins on the pavements for anything of value. The unaccustomed presence of obvious wealth and poverty is doubtless one reason for the rise out of nowhere of an ultra-nationalistic grouping (later registered as a party), called *Atáka* (Attack), which took nine per cent of the votes in the parliamentary election of 2005. Another reason is that many people feel that the state is not so much being governed by those in power as carved up between them, and that there is no real democratic participation.

In the next 15 to 20 years, one long-term issue relating to culture, ethnicity and nationality will be how the Roma minority evolves. This is a population group whose lifestyle does not sit easily with the image of the modern European citizen. At the present time the number of people concerned may be between 350 000 and 450 000, although it is difficult to estimate for various reasons. The Roma generally live in separate areas of a town or city, or on the edges of villages in hutted settlements that are not yet connected to modern services. The attempts, during the socialist era, to accommodate Roma and non-Roma in shared housing estates failed because of cultural differences. In Sofia today it is difficult to find a taxi driver willing to drive into the Roma district known as *Fakultéta*. This partly is the result of real problems which can arise in slum districts, and partly reflects unreasoning dislike. Roma indeed are genuinely disadvantaged because of their background. This is apparent especially in the different treatment by the police, as human rights reports repeatedly have shown. However, concerning their overall position in society, it would be too simplistic to speak of mere exclusion or oppression. From a political point of view, it is not desirable in the long run that a large section of the population should live cut off from the system of communications, values and education of a modern, democratic state. The problem is more complicated than it seems from crude calls for “integration” and it is surely not enough to change the structure of an estate or to bus Roma children to “normal” schools.

Compared to problems of other states in the region the Bulgarian ones seem at least soluble, even though they may require considerable time, effort and money.

An appreciable part of that effort will need to be invested in education. As early as the 19th century, Bulgarian society had a close interest in education and science. In large measure, this resulted from the desire of the local Christian elite – artisans and merchants who had taken advantage of the large market provided by the relative proximity of Istanbul, the capital of the Ottoman Empire, and the large Ottoman armed forces – to follow European society, to join the culture of the West. And this meant breaking free of the Orient, which included South East Europe since the late Middle Ages, due to Ottoman Rule. There is today no question but that Bulgaria is part of Europe. However, the shortcomings in the education system which grew up during the forty-five years of communist party rule and were then markedly exacerbated by the financial decline of the early 1990s, still restrict cultural and economic progress.

Education in all its aspects is a factor in human well-being, but it is also an economic factor. Nowadays it is essential to be able to read and write, because otherwise it is impossible to play a part in society. The Roma therefore need help to catch up. But they are not alone. It is also necessary nowadays, for example, to know how to use a computer and to make sensible use of the information available in that way. Only some years ago, Bulgarian children had computer lessons in their timetables, but in practice no computers were available. Government now is trying to adequately furnish schools in order to solve this problem. However, the problem is a more general one. Education is a crucial factor for living standard. When Bulgaria does not provide very good education, both for children and for adults, this will have negative effects on the economy, since employers will prefer other locations for their industries. In the context of EU accession, it is already visible, that Bulgaria is far from ready to use in time the various means provided by European funds to support economy. Such means must be applied for, and this needs able people. In spring 2007 Bulgarian business complained that the country needed about 10 000 staff capable to write applications for support programmes, but there were, estimated, only 1000 of them available. Education is like seed capital. Education is a highly social affair as well, both in the individual sense, because it helps the individual to occupy a worthwhile place in society, and in the communal sense, because only a certain degree of education allows a modern, democratic society to function.

About this book

This description of adult education in Bulgaria was initially researched and written between late 2004 and mid-2005. The book was published in German in late 2005. This German edition had 246 pages. During 2006 and early 2007 the authors prepared the present English version. Statistical data were updated, and much information on recent developments was added, so that the English edition ended up with 356 pages.

Anyway, given the rapidity with which things in Bulgaria are changing, it is inevitable that some of the information will again become out of date relatively swiftly. This will affect not only figures like numbers of schools or numbers of training providers and participants, but also legislation. There have been numerous changes in recent years, partly in connection with EU membership, partly for other reasons. For example, the Vocational Education and Training Act that has been in effect since 1999. It was amended for the first time in 2000, and then again in 2001, 2002 and 2003 and then, several times running, in 2005 and 2006. With changing legislation, completely new institutions are being created. The National Agency for Vocational Education and Training NAPOO was set up in 2000, inter alia in order to issue licences to a completely new type of vocational training centres, called CPO (*céntăr za profesionálno obučénie*). By May 2005, 240 CPO had been licensed. NAPOO insiders then believed that the number of CPOs would not raise considerably any more, but in April 2007, when the present version of the book was finally edited, the number of CPO licences was already 420.

Given this pace of change, a book such as this can only be a snapshot. The authors hope, however, that it will help to explain the situation of Bulgarian adult education even in the longer term, especially considering some passages concentrating rather on background than on most recent statistics. Rather than reading the whole book, the reader anyway will have to pick out those parts of the text which meet his special interest.

The book is written first and foremost for education specialists intending to work in Bulgaria in the field of adult education. It is also of relevance to businesses wishing to work in Bulgaria and looking for trained staff there. The book shows the kind of employees that such enterprises can expect, where the strengths and weaknesses lie, and what institutions can be contacted.

In order to accommodate the different types of readership, the book attempts to explain matters in detail, and as objectively as possible. Occasionally the authors have nonetheless allowed their opinions to creep in because they feel that subjective personal commentary may offer better guidance than yet further exploration of the details where issues are complex or difficult to grasp. The authors' views are intended to be a starting point. Anyone who does not accept them is free to form his or her own opinion.

Sources. Some of the book is based on material from the Bulgarian National Statistics Institute, especially the Labour Force Survey and the Study on Lifelong Learning.³ More recent data was provided by the regularly published statistical surveys, especially on population, education, economy and the labour market, and especially on vocational training in enterprises, from 2006. For comparison with other European countries, we used the data base of the European Statistics Office (Eurostat). Other sources are the annual reports, information materials and websites of educational institutions, all the relevant legislative and regulatory provisions, several hundred text pages of government strategies and development plans, and reports of other institutions working in the field of education or political monitoring. Interviews were conducted with representatives of institutions such as the Bulgarian Chamber of Craft Trades (NZK), the Federation of Societies of Engineers FNTS, the Cultural Centres Foundation and the National Agency for Vocational Education and Training NAPOO. In the historical section of the book, the passages on adult education in socialism draw widely on an unpublished research by Kornelia Ilieva. And lastly, the book benefits from the experience collected by the IIZ/DVV over a number of years in the area of adult education in Bulgaria.

English and Bulgarian terminology. Terminology is a constant problem in the international discussion of educational standards. Frequently, terms just cannot be translated directly, or direct translation would be misleading: An apparent similarity between terms in the two languages might obscure important differences in the meaning or the context. The Bulgarian "*osnovno učilište*" can be translated literally as "basic school", but it may not be obvious that it means a school providing the eight years of primary and lower secondary education (*osnovno obra-*

³ NSI: *Obučenie prez celija život / Lifelong Learning* 2003. Sofia 2004. The indicators in the study follow the EU Commission template, facilitating international comparison.

zovánie) guaranteed in law (if not in reality) to every child. It follows that a “basic school” teaches elementary (primary and lower secondary) education.

Because the meaning of many different terms is not apparent from the translation, we have often given the Bulgarian original (in *italics*) after the English translation. This may seem redundant at first sight, but it is the best way of avoiding misunderstandings, and it may even help when talking to Bulgarian educationists.

For transliteration of the Cyrillic script, we have adopted the system used in German academic communications, in preference to the systems that are normally used in English books, chiefly because the German system has a more precise 1:1 transliteration of Cyrillic to Latin. A few hints on pronunciation will therefore prove useful:

š	like sh in shall	a	like in B <u>u</u> ckingham
č	like ch in church	e	like in e <u>m</u> bargo
ž	like s in leisure	i	like in I <u>n</u> dia
z	like z in zebra	o	like in O <u>u</u> xford
c	like ts in tsetse (never as English c)	u	like in mood, but shorter
x	like German <i>Bach</i> ⁴	ă	like in a <u>b</u> out (mid-vowel between a and e) → <i>Bălgărija</i>
j	like y in yoghurt.		

Consonants at the end of words are generally not voiced: hence, former President *Željko Želez* is pronounced “Žélef”. The word for “man” (*măž*) sounds – despite the ž– like “măš” (sh), and the word for “I” (*az*), is pronounced with an unvoiced “z” as in “fuzz”, despite of z otherwise being voiced.

Unlike in English or German where there is an important difference of short and long vowels, vowels in Bulgarian. are always short.

In this book we have generally added stress marks (´) to words of more than one syllable. Such marks are not found in Bulgarian orthography, or in the interna-

⁴ German academic transliteration would use “ch”. We have substituted the ch by an h here, because it seems less confusing, especially for readers who have an English background.

tional standard transliteration systems, but they will assist pronunciation since there are no rules governing where the stress falls in a word in Bulgarian: this has to be learnt by heart for every word.

Legal terminology. Bulgarian laws are generally divided into *člénove* (singular: *člen*). We usually translate it “section” (s.), since this best corresponds to its function as the most frequent unit of division in legal texts.

Structure of the Book

The book is intended to provide an introductory yet comprehensive survey of education in Bulgaria, with the emphasis on adult education. Education can be seen from two angles: that of its structural requirements (institutions, laws, regulations, plans) and that of everyday reality. In other words, one way of looking at it is to ask the question “What is intended?”, and the other is to ask “What is achieved?” Both questions are addressed in this book.

Chapter 1 first gives a brief historical introduction to Bulgarian adult education in general, and turns then more particularly to the types of adult education common in the People’s Republic of Bulgaria before the change of regime in 1989/90. These differed in their ideological orientation quite markedly from what is now regarded as adult education. However, the notion and ideal of lifelong learning was then already current, at least in theory.

Chapter 2 examines the formal education system at present: schools, higher education, vocational education and training (VET), and the framework of institutions, authorities and laws. It is concerned both with “standard” (non-vocational) education and with the system of VET. The system has been inherited largely from the socialist era, including about 500 vocational lower secondary schools, Vocational *gimnázii* (for vocational upper secondary education) and Vocational colleges which are of special interest to this book, since vocational courses are particularly relevant for adult education as well. In the present English edition of the book, a completely new section deals with the reform programme for school education which is to be performed in the decade 2006-2015.

Chapter 3 looks more closely at the prerequisites of adult education in Bulgaria, concerning legislation and regulation. The relevant legal acts are presented. A range of government papers concerning adult education is discussed, including

the Strategy for Continuing Vocational Education 2005-2010 and the Adult Training Strategy for 2007-2013 that even was not officially adopted when this book went to print in April 2007. The institutions which are involved are described, like Ministries and administrative bodies, including the National Agency for Vocational Education and Training (NAPOO), which has recently been playing a key role in regulating the education and training market.

Chapter 4 deals specifically with non-formal adult education. In other word: adult education which takes place outside the formal system of schools and universities, but nonetheless leads to generally recognised qualifications. The various providers are discussed, for example local cultural centres, the network of engineers' associations, the *Znánie* associations, the new "CPO" training centres, and those players from the field of formal education (schools and higher education establishments), which also are engaged in non-formal programmes for continuing education. Other vocational training providers belong directly to the world of work: employers, trade unions, chambers of craft trades, etc. Chapter 4 is the core of the book. If you want an instant impression what's up in Bulgarian adult education, forget the rest and read just Chapter 4.

In Chapter 5 the perspective changes, away from the providers and towards the users. Largely with the help of figures from the Bulgarian Statistics Office, it can be seen to what extent adults, or those capable of gainful employment, have made use of the education and training provision available to them so far, and how much (or how little) they use self-learning methods.

Chapter 6 gives an overview of the economic situation, population, level of education and labour market in Bulgaria, largely using statistical material, together with some commentary. The chapter also presents statistics on how well (or how badly) educated are some groups of the population in Bulgaria. By this it becomes apparent that action is urgently needed in the area of adult education if European integration is truly to succeed.

The Conclusions and Recommendations at the end of the book summarize the most important factors. An attempt is made to suggest policy guidelines.

The Appendix contains a few larger tables which may help to give a clear idea of the education system in Bulgaria; there is also a list of abbreviations, a list of institutions, a selected bibliography and other additional things, for example some words about the authors.

What the Book Does Not Cover

We have sought to discuss the topic of “adult education in Bulgaria” as fully as possible, but depending on the reader’s expectations and prior knowledge, he or she may find some aspects missing. The field of political education – a major shortcoming in the Bulgarian education market – is barely touched on. But there is not much to report, anyway. The initiatives that do exist are the result of the work of international NGOs. Mention of political education will most likely be found in those parts of the text devoted to such NGOs. Since there is little point in listing all the individual initiatives that currently exist, those that are described may be taken as representative of others. Nevertheless, the sudden success of the xenophobic grouping *Atáka* in the parliamentary elections of June 2005 has clearly demonstrated that political education would make an important contribution to a democratic Bulgarian society.

Little attention is given to teachers. An entire chapter could have been devoted to the training, skills, methods, career opportunities and life stories of teachers in adult education, together with the relevant legislative framework, or rather a description of how such a profession has in fact grown up entirely without legislative provision. Teachers are closely associated with the question of teaching methodology, and specialists would probably be more interested in what methods are most commonly used.

Foreign education providers such as the Institut Français, the Goethe-Institut and the British Council also contribute to adult education through their specific cultural activities. They are not referred to here because the intention was specifically to describe the Bulgarian system.

The education provided by the Churches or religious groups of all kind would be another separate area. The Bulgarian Orthodox Church actually offers less than might be supposed. There are activities such as Sunday Schools (principally for children) and weekend courses on parish work, group work and social issues. These often grow out of the initiative of committed lay people or priests, but to very little extent of the Church as an institution. Sunday Schools, seminars for lay people, and courses in parish work are isolated and unsystematic occurrences. This is mostly related to the peculiarly unwieldy nature of the Bulgarian Church at present, which is to a large extent caused by the structure of its hierarchy. Another reason is that the Church, until 1989, was barred from all forms of social

activity which – despite a common perception in the West – had started to evolve quite vividly in the 1920s and 1930s. The few activists of today are therefore true pioneers.

Groups such as the Mormons, which frequently originate in the United States and are generously funded, are more active than the Orthodox Church. They offer all kinds of activities with a missionary purpose. Many of them may have purely secular educational provision, in foreign languages for example, but these serve principally to attract people to the group. However, we find it difficult to regard this as adult education in the classic sense. And, here too, it would be necessary to describe each individual initiative in order to arrive at a clear picture.

It would also be of interest to observe what is happening in the area of Islamic religious education, and the extent to which it relates to adult education. Especially in the region with a considerable share of Muslim population, in the South East and North East of Bulgaria, a network of state independent religious education has developed in recent years, sometimes with support from outside Bulgaria.

Another topic that we have not researched at all is education within the army, especially outside the G. S. Rakovski Military Academy in Sofia, the Vasil Levski Military University in Veliko Tŕrnovo and the Nikola Vapcarov Naval Academy in Varna where higher staffs are trained. In the socialist era at least, civic awareness was a key element of what was taught in the armed forces. In the meantime, Bulgaria has joined NATO and has considerably reduced its military manpower.⁵ By end of 2008 general conscription will be stopped, Bulgaria will completely rely on professional staff for its armed forces. This shifts adult education in the army from general civic education to vocational education and training. For some years, another field of adult education related to the reduction of manpower, was retraining. Programmes had been run to help professional officers to return to civilian life, for example as stock-breeders.

A vast field of interest would be the private language schools. Bulgarians traditionally place great emphasis on learning European languages (principally German, French and English, with Spanish and Italian as well now, and until 1989, of

⁵ From 107 000 in 1990 to 78 000 in 2001 and a target of 45 000 (including 6000 officers) in peace times as part of NATO which Bulgaria joined in 2004.

course, Russian). This tradition is still kept up, as is evident from the many specialist foreign language *gimnázii*, in which much of the teaching is carried out in the language in question. Since the change of regime in 1989, many school and higher education teachers have transferred to private teaching or have started private schools and teaching centres. We have left out the question of private language schools. However, the wave of private educational providers set up in the 1990s is addressed in Chapter 4 (“Providers of Non-formal Adult Education”).

It is even harder to pin down the informal citizens’ groups that have recently started being formed in larger towns and cities, in which people can gain training in computing from advisers and from discussions, for example the open source operating system Linux. In the way this works, it is classic adult education, and could be described as vocational continuing education. It is organized without educational sponsoring bodies and yet takes the traditional form of training courses and classes.

Another new form of training has developed with computers and internet becoming popular. The Internet is not only a means of communication but also an information and learning opportunity. Although there are many attempts now to teach computer skills in schools, much more effect have computers and internet available at homes. Although not that common as in the UK or even the US yet, home computers have become a standard equipment of Bulgarian households in recent years, sometimes purchased prior to a washing machine. In the towns, it is only a matter of hours to get a high speed internet connection.⁶ Any young person setting up his or her own website learns how to be both a consumer and a manipulator of the medium, usually through self-learning or from friends. There is no reference at all to this form of activity in the book. But it should be borne in mind that new ways of transmitting knowledge and skills are, obviously, coming into being.

Acknowledgements. It is not possible to thank all those who have helped to bring this book to fruition, but those who have made the greatest contributions should be acknowledged. First statistical data were procured by Ivo Baev, and it is his and the NSI staff’s input which informs to a great extent our discussion of the Bulgarian education system. Maria Todorova shared with the authors the benefit of her experience of education, and provided important contacts. Kornelia

⁶ German users who are familiar with delays of four and more weeks when they order a broadband internet access will find Bulgaria a service paradise, in comparison.

Ilieva supplied the basis for the section on adult education under socialism, and Kathrin Wiemer contributed many suggestions about the structure of the book. The German edition was translated into English by Peter Sutton. For any oddities in style, however, the authors themselves are to be blamed, since many changes and additions have been made afterwards. Typesetting and all the graphics was done, with much attention, by Christo Založnikov. Finally, we must thank the many people in positions of responsibility in institutions and organizations, whose willingness to give up hours of their time for interviews and to answer many questions have lent the book much of its topicality.

Munich and Sofia, April 2007
Christian Geiselmann, Johann Theessen

1 Looking Back: Adult Education in Bulgaria before 1989

This chapter is intended to give an overview of the history of Bulgarian adult education. The period from the foundation of the modern Bulgarian state in 1879 until the Second World War will be considered briefly, while the communist era will be dealt with at greater length, particularly the 1980s.

As in other countries of the former Eastern Bloc, the socialist past is still a topic that most people prefer not to talk about. Even academic research is only slowly beginning to look at this era of history, largely because of the gradual change of generation in the universities. Any open discussion of how the years from 1944 to 1989 should be evaluated would still stir up controversy. Just now, in 2007, a discussion on what to do with the piles of personal files collected by the secret service in communist times, is gaining more impact on the public. Likewise, institutions that survived the change of regime in one form or another refer in their publicity rather to traditions dating from before 1944 and to successes since 1989/90, leaving out the 45 years in between.

We shall focus on four areas of education which were particularly highly developed in the socialist era: (1) vocational continuing education and training provided by enterprises and trade unions, (2) inservice training for teachers, (3) education provided by the mass organization the “Fatherland Front” and (4) the adult education provided by the Communist Party itself.

The activities of the individual institutions involved in adult education during the socialist era, and the practical arrangements of that period, will be discussed in the book wherever those institutions are described in detail. This applies particularly to the trade unions, the cultural centres (*čítálišta*) and the “Houses of Science and Technology” of the societies of engineers.¹

1.1 The Beginnings

The Bulgarians have paid great attention to education in the European mould since the 19th century. From the late middle ages until 1878/79 the Bulgarian

¹ See Chapter 4 (Providers of Non-formal Adult Education) from p. 177.

lands were part of the Ottoman Empire and many areas of social life were therefore influenced by Islamic and Ottoman culture.

Within the Ottoman Empire there had been practically no state system of school education in the Western sense. There had been a system of *medreses* (Islamic schools of religion and law), to train Ottoman civil servants. Like other institutions as mosques and attached establishments of social care, the *medreses* normally were financed by the traditional Islam endowment system (*vakıf*). A few specialist schools along Western lines also began to be opened in the 19th century in such areas as medicine and military studies, as a part of the attempts to modernize the Empire. But such institutions were limited to major Ottoman centers like Istanbul or Thessaloniki.

On the other hand, the Orthodox Church, and especially the monasteries, had been providing a network of learning facilities since the middle ages. They concentrated mostly on religious contents and, since Orthodox Christendom in the Balkans was dominated by Byzantine culture, on Greek language. Greek language served as a *lingua franca* in the Balkans also for trade. Thus the monastery schools provided a learning opportunity not only for clerics-to-be, but for sons of merchant families as well. Greek dominance however began to be combated by a rising Slavonic self esteem. From the late 18th century, and especially during the 19th century, a movement for a Bulgarian Orthodox Church independent from the (Greek) Patriarchy in Istanbul (Constantinople) became the starting point of modern Bulgarian nationalism. Bulgarian Orthodox Church (then named “Bulgarian Exarchate”) received official recognition by a *ferman* of Sultan Abdul-aziz in 1870.

A first Bulgarian textbook for modern primary education, concentrating on Bulgarian language and other practical skills, had been issued in 1824 by an outstanding scholar, Petăr Beron, who lived in Transsylvania, with financial support by a Bulgarian merchant. This small book, later known as “The Fish Primer” (*riĭben bukvár*, because of a drawing on its cover), was meant to be used as an incentive of a modern and practical Bulgarian primary education. It was to be used in the several schools which were being founded during the first decades of the 19th century all over Bulgarian lands. This book was followed by about 300

other Bulgarian textbooks until 1878/79², nota bene without any government structures actively being involved in this process.

In the European dominions of the Ottoman Empire, the initiative to establish schools patterned on those in Central Europe was largely taken by the local inhabitants, belonging to the majority of Christian population. They became better organized in the course of the 19th century and looked increasingly to Central Europe. Foundations were set up largely by the better-off, such as merchants and artisans, often in co-operation with the local parish and the trade guilds. Similar developments took place all over the Balkans with their predominantly Christian population. In Bulgarian lands, close to Istanbul as the Centre of the Ottoman Empire, this development was particularly strong. From the early 19th century, a Bulgarian school education system was maintained by local communities dominated by artisans, merchants, the guilds and church parishes in order to provide children with elementary education in contemporary subjects, using what were then the latest methods. This led to a rapid rise in the level of education of the population. Wealthier families began to send their sons to university in Vienna, Leipzig, Munich, Ljubljana, Paris or Petersburg.

This European orientation was encouraged by political conditions: the growing influence of the European powers in the Balkans, especially after the Crimean War of 1853-1856, and the reforms in the Ottoman Empire itself, which granted non-Muslim subjects ever greater rights in several stages between 1830 and 1870, including the right to establish their own schools. The reform movement in the Ottoman Empire was led by parts of the governing élite. Their attempts to modernize the political and economical structures additionally pushed forward especially Bulgarian lands, since a substantial part of them from 1864 on formed the “Danube Vilayet”, kind of a testing area for Ottoman modernization. This was a developing factor which, however, still seems to be underestimated by Bulgarian history textbooks and public opinion.

According to historical investigations, there were Bulgarian schools in 200 towns and villages in the Bulgarian part of the Ottoman Empire in 1835, by 1855 there were 600, and in 1877, shortly before the state was founded, there were 1500³

² *Istorija na Bălgarija văv 14 tomove*. Vol 6. p. 108.

³ A good map of Bulgarian schools in the years 1856-1878 is to be found in *Istorija na Bălgarija v XIV toma*, Vol. 6, pp. 98-99.

which means, that roughly in about 50 of every 100 villages there was an opportunity for children to attend some kind of classes.

The education system of the area that was to become the Principality of Bulgaria was thus largely modelled on Western, European ideals even before it became a state. New educational methods such as the Bell-Lancaster method of “mutual teaching” were taken up in Bulgarian classrooms almost at the same time as in the rest of Europe and overseas. The teaching content focused not only on the practical needs of the craft trades and commerce, but also on the spreading ideology of the nation-state. The subjects taught and their syllabuses were typically very varied since the education system was set up in a decentralized manner, without guidance from any state agency. What was taught was largely a matter of local circumstances and the individual skills and preferences of the teacher.

It was only when Bulgaria was detached from the Ottoman Empire and became an independent state in 1879, that a standardized national education policy was introduced step by step. The new elite placed great emphasis on this, particularly as most of the early leading politicians had received their education in a variety of European countries. Many had themselves had worked for a number of years as teachers in Bulgarian towns and villages. Bulgaria introduced four-year compulsory education towards the very end of the 19th century.

Alongside the school system, which was intended to provide education chiefly for children, a network of cultural centres (*čitálišta*) also developed in the 19th century. They were organized in much the same way as today’s voluntary associations. Their intent was to provide education for adults in the form of public libraries, lectures and cultural events such as theatrical performances and lieder evenings.⁴

⁴ *Čitálište* can be translated literally as “place for reading”, or more freely as “reading room”. However, its function is better conveyed by the term “cultural centre”. For further details of the *čitálišta* see Section 4.8 from p. 211. The legal basis of the cultural centres today is discussed in Section 3.1.6 from p. 146.

1.2 Adult Education after the Foundation of the State (1879)⁵

During the second half of the 19th century there had been several attempts to set up Sunday schools for adults in order to spread reading and writing. These were modelled on similar institutions in Europe and America. There is mention of schools being established privately in Strelžza in 1850, in Šumen in 1862 and in Prilep (now Macedonia) in 1869. These attempts rarely lasted more than a few months, however.

The Sunday schools established largely from the late 1860s in many towns and numerous larger villages proved more successful. By 1879, when the state was founded, there are records of around 50 Sunday schools, nine of these for women. The courses principally covered reading and writing, but also included other subjects such as physics and geography and practical agricultural, craft and commercial skills, which varied according to local needs. Some of those schools were organized by the cultural centres (*čitališta*). Other classes were organized by the the Bulgarian Orthodox Church, which had been officially recognised by the Sublime Porte as an independent institution in 1870, under the title of “Bulgarian Exarchate”.

The Bulgarian state for the first time in 1891 set up evening and Sunday schools for adults who had not attended primary school. A journal entitled “Evening School” (*Večerno učilište*) first appeared in 1896. In that year also, the Bulgarian Teachers’ Association (*Bălgarski učiteliski sājūz*) drew up management rules and a curriculum for the evening and Sunday schools. Teaching in these establishments was free.

⁵ There is a widespread conception in Bulgarian society that the Bulgarian state was founded in 681 A.C. by Han Asparuh, when this Protobulgarian chief crossed the Danube with his people, and settled, after battles with Byzantine forces, in an area that is now northern Bulgaria. This is not wrong, but it is hard to adjust with modern conceptions of nation and state. During Ottoman Rule in South-Eastern Europe there was for about 500 years no kingdom, state or empire which called itself (or was called by others) “Bulgaria”, although this name continued to be used for the region and its Slavonic inhabitants. After the Russian-Turkish war of 1877/1878 a Bulgarian State –in a modern sense, with a constitution, a government, several institutions, and a monarchy– was founded in 1878/1879 by Bulgarians, supported by the Great Powers, especially Russia which had its special interests in Balkan politics. We call this “Foundation of the Bulgarian State”. Traditionally, Bulgarians would rather call it “Liberation from Ottoman yoke” or at least “Liberation from Ottoman rule”.

Under the Education Act introduced in 1909⁶, local authorities were obliged to provide the population with two-year supplementary literacy courses (day courses, evening courses and public holiday courses). However, the Balkan Wars of 1912-13 and the First World War (Bulgaria was involved 1915-1918) put a stop to any implementation of the law. When civilian life was restored to its normal course, these evening courses were organized chiefly by districts with a communist majority on the council (so-called *komúni*) in the early 1920s. Since there was often a lack of funds and organization to implement national laws and regulations, it depended largely on the will of the local decision-makers whether and how they were actually applied. The notion of free, broad-based adult education was one of the ideas of the left-wing political spectrum, so that the *komúni* in practice made greater efforts than the other local authorities.

Such adult literacy courses continued until the mid-1930s, when they gradually became redundant. By then, most young adults could read and write, as a result of school education becoming more widespread. Free compulsory education for all children aged 7 to 14 years had been introduced by the 1921 Education Act. Thus, completed elementary education became more or less standard from the early 1930s.

The 1920s and '30s were also full of other initiatives in the field of adult education. When the need for adult literacy courses declined, other subjects became popular, such as health, civic and even political education. Voluntary associations carried out some activities. The temperance movement, which was one of the driving forces behind adult education in Western Europe, spread in Bulgaria too between the wars. The Orthodox Church began in the 1920s to introduce a broad modernization programme, providing courses partly for their own staff (parish priests, church cantors and subsequently youth group leaders, etc.). Another favourite way of making contact with the public outside services were lecture and discussion evenings (*besédi*). Religious topics predominated, but priests were also obliged by both state and Church to spread useful knowledge of all kinds, particularly in rural areas. Lectures were held by priests on new agricultural

⁶ *Zakón za naródnata prosvéta*, ZNP.

methods and entire income-generating activities such as silk-worm farming and bee-keeping. People were also to be given a knowledge of medicine.⁷

Another aspect that must be touched on at this point is the courses originating in the communist movement. At secret meetings, activists were instructed in ideology, or read and discussed authors like Marx, Lenin or Bakunin. In their memoirs, communist activists of the 1920s and 1930s regularly report of secret meetings that were held in forests and remoter areas, since being a communist was illegal in most times during the 1920s and 1930s, and police was used to much brutality. There were also courses on conspiratorial behaviour, the collective economy of the USSR, and languages courses.⁸ Especially the Esperanto movement, which was closely associated with the workers' movement, had numerous adherents in Bulgaria. Esperanto clubs were formed in many towns and villages, building on individual initiatives launched in the late 19th century, and they then combined into umbrella organizations. During the age of agrarianism in the early 1920s, Esperanto had even been a school subject in secondary technical schools (*reálki*). A "Workers' Esperanto Association" (*Rabótničeski esperántski sājúz*, RES) was founded in 1930. However, it was banned after a few years because of its political orientation, and the activists transferred to the older and less political "Bulgarian Esperanto Association" (*Bǎlgarski esperántski sājúz*).

All of this can certainly be regarded as adult education, even though there is no clear division between education and propaganda. By the way, in those years the communist movement had many adherents among schoolteachers. This further strengthened the affinity between communism and the ideals of adult education.

Another organisation engaged in education was the umbrella organization for the craft trades. It offered a lively range of activities in the 1930s. The Bulgarian Chamber of Craft Trades⁹ has its headquarters today in an impressive building from the 1930s, not far from Sofia main railway station. This building once was

⁷ For the work done by priests in the period 1920 to 1955 see the dissertation by Christian Geiselmann which is shortly to appear in Germany.

⁸ See also: Christian Geiselmann: Politisches Leben in der bulgarischen Dorfgesellschaft 1919-1944. Am Beispiel der Memoiren des Stefan Rajkov Canev aus Vǎglevci. [Political Life in Bulgarian Rural Society. The Memoires of Stefan Rajkov Canev from Vǎglevci.] In: Digitale Osteuropa-Bibliothek, Reihe: Geschichte. ISSN 1613-1061 (www.vifaost.de).

⁹ *Nacionálna zanajatčijska kámara*, www.nzkgb.org

the Central School of Apprentices. It shows, despite its present state of dilapidation, the influence of the craft trades movement between the wars, and of course its commitment to apprenticeship training.

1.3 Adult Education in the People's Republic

Education during the socialist era, in general terms, was typified by ideological orientation and centralized organization. Frequent attempts at reform sought to remedy structural shortcomings.

Adult education took place both through the formal education system (whenever adults attended classes in normal schools) and through a wide array of courses, events, societies and institutions outside the school system. Very many institutions and associations provided education in the form of courses, study circles and correspondence courses.

Vocational continuing education and retraining were usually organized by the state-owned enterprises. They generally played an important role in society, being often responsible for childcare, holiday arrangements, social and cultural events. Enterprises also provided initial and inservice training, especially in order to support changes in the structure of the economy which were planned to remedy structural shortcomings. The Ministry of Education prescribed the methodology, while the Ministry of Labour and other Ministries had a say over organizational matters.

Adult education in the more general sense was provided by a variety of bodies such as the "Society for the Propagation of Scientific Technical Knowledge", the "Houses of Science and Technology" run by the technical associations (the societies of engineers), the trade unions and various other clubs and societies. (Where these still operate, they will be discussed more fully in Chapter 4.) The mass organizations "Fatherland Front" (*Otėčestven front*, OF) and the Communist Party should also not be forgotten. Their adult education activities will be considered a little later in this chapter.

Among the non-formal education organized by the state in the People's Republic of Bulgaria, there were also radio and television programmes such as language courses and courses on history, music, literature and social sciences. Some of these broadcasts were specially arranged to coincide with examination periods in

secondary and higher education, so that pupils and students had the opportunity of enjoying additional tuition and reinforcing their knowledge by radio and television. The criticism was also made, however, that these programmes did not take sufficient account of the needs of adult users and people in employment.¹⁰

Adult Education as a Policy Area

Knowledge, education and the full development of the collective personality were key aspects of the perception of the world and the human being under socialism, as was stated in the preambles to many laws and Party conference documents. Practically all institutions were obliged to concern themselves with adult education. As a result, adult education was not a matter for one isolated section of government, but many different sectors of government and the Party structure itself were involved in adult education. Statements proclaiming the high priority of lifelong education in the socialist way of thinking were omnipresent in formal speeches, pronouncements and programmatic declarations, and typically read as follows:

“Education in socialism is directed to the development of the rounded personality, which is characterized by a high level of general and vocational education, and by thought and action determined by a scientific outlook and the standpoint of the working class.”

Or:

“The socialist personality is marked by its conscious and active commitment to preserving peace and creating the socialist society, by its adoption of a Marxist-Leninist world view, by its striving for specialist and cultural education, by its adoption and implementation of the principles of socialist morality, and by its optimistic attitude to life!”

Socialism was thus not that far removed from the kind of wording found today in EU programme documents, even though there might be essential differences in

¹⁰ Micheva 1982 S. 61.

the underlying philosophy. The methodology used in socialist adult education, however, largely kept close to that designed primarily for children and young people. Courses were not generally adapted to suit the specific needs of adult learners.

Stages of Education Policy

The development of the education system in Bulgaria in the years 1944 to 1989, during the period of socialist rule, can be divided into a number of stages, beginning and ending with a series of laws and programme documents issued by the organs of the Communist Party. The Education Acts of 1948 and 1959,¹¹ and the Plenary Meetings of the Central Committee of the Bulgarian Communist Party (BCP) of 1969 and 1979, marked clear turning points. The Plenary Meeting of 1979 also adopted the “Principles for the Development of the Education System” (*Tézisi za razvítie na obrazovátelnoto délo*). Another break was the Twelfth Congress of the BCP in 1982, when “Principles for the Transfer to the New Structure of Education” (*Osnóvni položenija za préxoda kám nóvata obrazovátelna strúktúra*) were agreed.

These changes took place against the background of the following sequence of general political developments in Bulgaria:

- By the end of the 1940s: Transfer to Communist Party rule. Educational institutions “brought in line”
- By the end of the 1950s: Industrialization and urbanization (resettlement of a large part of the population in towns and cities)
- 1970s: High point of the wave of modernization known as “developed socialism”: specialization and fragmentation of production, and therefore also of education
- 1980s: A crisis in the system because of the failure to solve problems in production and in political management: an imbalance between production capacities, stages of education and output from the education system

After the Second World War, it was literacy programmes that were resumed first in the area of adult education, and provision was created to enable adults belat-

¹¹ *Zakón za národnata prosvéta*, ZNP.

edly to attain specific stages of school education. New types of evening school were approved in 1945 for that purpose: one-year primary schools for illiterates, one-year evening schools for people with little reading and writing ability (*malo-gramótni*), two-year evening “*progimnázii*” and four-year evening *gimnázii*. This was the plan. In reality, shortened evening courses were introduced for adults whose reading or writing was poor or non-existent. From October 1946 there were also evening *gimnázii*.

In the 1950s and '60s no further need was then seen to provide education specifically for adults at primary school level. At that time, however, rapid industrialization and modernization created the need for new types of vocational continuing education, training and retraining of workers. This led to the 1959 “Law on Closer Ties between School and Life” (*Zakón za po-tjásnata vrážka na učilišteto i života*), which also introduced a system of post-graduate training in higher education.¹²

By the 1980s, a wide range of non-formal and informal educational provision had come into being:¹³

- A series of schools outside the formal education system itself (*obštéstveni škóli*) for languages, music, sports and art
- Party schools
- Continuing education courses in enterprises or higher education institutions (both short and long-term); a distinction was made between courses for which leave of absence was granted from work, and courses held outside working hours
- Seminars, meetings and gatherings (*drugárski sréšti*), and conferences
- Public readings and lectures

¹² The abbreviation VUZ (*vísše učébnó zavedénie*, institute of higher education) is often used in Bulgaria to denote all forms of higher education establishment, such as universities and specialized institutes.

¹³ The conventional distinction between formal, non-formal and informal education can be summarized as follows. Formal education: taught in separate institutions and leading to generally recognised qualifications. Non-formal education: taught in separate institutions, but certification is not crucial; Informal education: without the involvement of a teacher. The three areas cannot always be clearly separated. See the definition of terms in the Appendix.

- Gatherings on public holidays, when the main topic was naturally the theme of the celebration
- Education programmes on radio and television
- A widespread practice of organized visits to exhibitions, museums and theatre performances, usually through a works collective
- A broad range of provision at cultural centres including amateur crafts and performing arts. One expression typical of the socialist era was “*samodéjní kúrsove*”, literally “do-it-yourself courses”, which generally operated without a teacher. The participants taught each other using a form of group self-teaching. Participants proudly referred to themselves as *samodéjci* (“do-it-yourselfers”). When used by outsiders, however, the term often had a somewhat demeaning flavour, as tending towards amateurishness. The *samodéjci* movement also seems to have been closely connected with socialist forms of culture, since the word is scarcely used at all nowadays except by older people who still live by the cultural traditions of the age before the change of regime.
- Services offered by libraries, which extended even to the smallest village. Local cultural centres (*čítališťa*) sometimes had (and still have) libraries, while some libraries were run as separate establishments. The libraries of the local Party organization were available only to restricted categories of persons.
- Excursions within Bulgaria and to other socialist countries arranged by pensioners’ associations. Today there is hardly an elderly Bulgarian who has not been in Eastern Germany to visit the cities of Leipzig and Dresden at least once during the socialist era. Pension age in socialism was generally low, and even lower for many respected groups of people or those with physically demanding jobs. Anyone who had been awarded the title “Fighter against Fascism” as a result of his or her conduct before 1944, for example, could retire as early as the age of 50. Other privileged groups were miners and soldiers. The low pension age increased the demand for such excursions. There were so many of these that GDR citizens looked on excursion groups of Bulgarian pensioners with a mixture of amazement and envy.

Opportunities to Gain Formal Qualifications in Adulthood

In the 1980s, schools arranged evening courses to enable adults to make up for general or vocational school qualifications which they had missed as children or young people. This usually meant for those of more than 16 years of age who were in employment. Contemporary documents from around 1980 divide this provision into the following categories:

- Evening basic schools: for people who were working but had not completed basic (compulsory) education
- Evening middle schools: three-year courses for people who were working and wished to have another chance to complete middle-school (upper secondary) education
- Evening vocational schools: for working people who had not completed basic (compulsory) education. After two years participants were given a certificate of completion of basic education as well as a vocational qualification.
- Vocational evening middle schools: three-year courses for people who were working and wished to have another chance to complete upper secondary education (*srédno obrazovánie*) at the same time as acquiring a vocational qualification
- Evening *texnikum*: four-year courses for working people who had completed basic education, and two-year courses for working people who had completed middle (upper secondary) education (*srédno obrazovánie*). Participants were generally at least 17 years of age. On satisfactory completion of the course they were awarded the title “specialist”.
- Correspondence courses for working people. The courses were matching various types of school. This solution was used when it was not possible to establish a separate evening school for adults in a particular region.
- Courses for shift workers: in many enterprises, courses were set up similar to the evening schools described above to suit shift patterns so that workers could attend them more easily. The teaching might be arranged by the enterprise itself or by a local or regional educational institution.

- In-house inservice training, especially for people who had not completed basic education. The aim on completion was to pursue vocational middle education.

- Individual teaching for more experienced staff.

In the academic year 1978/79 there were 11 specialist evening *téxníkumi* and 34 evening school departments of regular *téxníkumi* in Bulgaria, with a total of 11 000 learners. Another 93 *téxníkumi* and evening *téxníkumi* also had their own correspondence departments, with a further 11 000 learners.¹⁴

All in all, this provided a system that gave adults a second chance to complete those types of school education on which they had missed out as children or young people. The focus was on catching up with compulsory basic education and middle (upper secondary) education (*srédno obrazovanie*), usually complemented by vocational training. These courses were generally organized locally by the schools responsible for the school qualifications, while the costs of accommodation, materials and services (electricity and heating) were borne by the enterprise for whose employees the courses were held. If the courses took place in the school itself, the school then covered the costs.¹⁵

Training contracts with an enterprise

During the socialist era¹⁶ vocational skills could be acquired not only in schools but also via a training contract (*dógovor za učeníčestvo*) or apprenticeship contract with a particular enterprise. It was a precondition that the signatory had completed at least basic education (*osnovno obrazovanie*, eight years), although there were exceptions. This training related principally to low-skilled manual or semi-automated jobs.

The legislation on apprenticeship contracts, which dates from the 1950s, is still in force and is contained in s. 230-237 of the Bulgarian Labour Code (*kódeks na trudá*).¹⁷ The “apprentices” receive a modest wage.¹⁸ When they complete their

¹⁴ Micheva 1982. p. 34.

¹⁵ For details of syllabuses, social programmes, maternity assistance, etc., see Micheva 1982, p. 40 ff.

¹⁶ We again concentrate on the 1980s.

¹⁷ As at June 2005.

training, apprentices may be obliged to work for a certain length of time for the enterprise, but this obligation may not exceed three years. The training may take place individually or in groups. Every apprentice is attached to a skilled worker (master or instructor). In the case of group teaching, the master may teach all the apprentices provided that they are all in the same area of work. The length of training depends on the occupation, but may not (and in the past might not) exceed six months (s. 230 para. 2). The apprenticeship contract is a subsidiary form of a contract of employment, and there are no specific conditions prescribing the learning process more exactly.

Inservice Training (PUC and other)

A new system of in-house inservice training was introduced in the People's Republic in 1972 (Decision of the Council of Ministers of January 22nd, 1972), the essential element of which was the establishment of training centres within enterprises (*profesionálni učebni centrove*, PUC). These centres were intended to provide various kinds of initial and inservice training, adapted to modern production methods. It is reported that there were 682 such PUCs in the entire country in 1982, and that some 400 000 workers took part in their courses.¹⁹ The aim was not only to improve occupational skills (and to offer promotion as a result²⁰), but also to raise the general level of education. Sometimes even stages of formal (school) education could be acquired in the PUCs, such as the certificate of middle education (*srédno obrazovanie*, with or without an additional vocational qualification).

Contemporary sources speak of courses in over a dozen fields being provided in the PUCs:

¹⁸ According to the current wording of the legislation, "not less than 90 per cent of the legal minimum wage" (p. 230 para. 4). The legal minimum wage is presently (2007) 180 Leva (92 Euros) per month.

¹⁹ Micheva 1982 S. 43.

²⁰ The grades of workers in socialist manufacturing enterprises were known as *razrjad* or *razréd* ("ordering, grading"). A higher *razrjad* could be obtained by means of length of employment, examination, training courses, or successful suggestions for improvements in working processes. This went with an increase in wages.

- Courses for new recruits to the enterprise (induction) lasting three months to a year, and in complex industries, up to eighteen months. These courses were intended specifically to integrate young adults into working life
- Inservice training for staff, usually consisting of 270 hours of instruction in a year
- Refresher courses for staff in an enterprise
- Courses to improve the general education of the staff of an enterprise. The curriculum was in accordance with Education Ministry regulations.
- Courses leading to a higher level of vocational training. (Vocational training was then classified by means of a seven-stage system.)
- Courses leading to a second vocational qualification for those already in work
- General inservice training courses
- Special courses in which staff learnt to use new materials or machinery
- Courses in enterprise management, relating to the industry in question
- Courses in specific skills for supervisors, team leaders, engineers, etc., with high or very high vocational qualifications
- Courses on modern (in the jargon of the time “scientific”) methods of labour organisation and enterprise management
- Courses in industrial and product design (under the name “industrial aesthetics”)
- Courses on ethics (moral issues, aesthetics and politics)
- Courses on safety at work and fire protection
- Courses to teach the results of pilot studies and new methods of working

PUCs were in existence until 1991, when they lost their legal status under the new Education Act (ZNP), and the beginnings of economic restructuring did the rest.

For enterprises that were not in a position to set up their own PUC, there was a system of individual and collective induction and inservice training. “Individual training” meant that an experienced worker instructed the new recruit during the production process. This form of training was naturally concerned with jobs that were easy to learn and required little previous theoretical knowledge. However, it

was not left to the individual trainer alone. The enterprise had to sketch out a syllabus and have this approved by the Ministry of Education.²¹

One favourite variant of individual induction was the method of “collective training” or induction with the help of the brigade. In this case, several new recruits (usually four or five) were integrated into a larger existing team (a brigade), which jointly took care of training the beginners. The trainees could thus experience a wider spectrum of jobs, and there was less disruption to the production process. Both forms (individual training and brigade training) ended with an examination by a commission made up of staff of the enterprise.

National Programme of General Education and Training in the 1980s

In 1971, the Tenth Congress of the BCP adopted a programme stating that “at the present time, education has ceased to be a one-off process”. Steps were taken from 1980 to organize continuing education and training: in the wake of a decision by the Politburo of the Central Committee of the BCP, the Council of Ministers issued Order No. 42 for the creation of a unified, national system to improve the skills of leading cadres, specialists²² and workers. This was in effect a proposal for a large-scale scheme of state adult education, not unlike the present-day “life-long learning” in approach. The programme stated that over 4.6 million management and executive cadres were to improve their skills in the 1980s. In fact, 1.07 million manual and office workers, generally from manufacturing industries, took part in education and training in 1981. These measures in the 1980s were addressed chiefly to people up to the age of 40 years. They were organized in cooperation with enterprises, trade unions and local authorities²³, and agencies were set up to arrange seminars, conferences and courses. From a present-day point of view, these courses would be described as non-formal education. Even

²¹ Micheva 1982 p. 47.

²² “Specialists” means here workers with higher skills, such as sociologists or engineers, and hence usually graduates of higher education.

²³ Trade unions (in this case: *prófsájuzi*) were under the socialist system practically state organizations which by definition were intended to represent the interests of workers, although they also served as a means of checking on those workers who were not in the Party. They could also be used to gauge the mood of the population. However, the trade unions did also arrange inservice training.

though certificates were issued for some courses, they served more as a record than as a recognised qualification.

At first these education and training activities were welcomed by participants, but the initial impetus soon lapsed. One reason was that enterprises, organizations and the municipal authorities competed to see which of them could provide the largest number of successful courses. They began forcing people to take part, and this reduced interest considerably. Moreover, the ideological content grew during the 1980s, and this also had a negative effect on the popularity of the courses.

Teacher Training (Continuing, Inservice)

One form of adult education which was relatively well provided for in socialist Bulgaria was inservice training for teachers in middle schools.²⁴ Bulgaria was one of those countries in the “Eastern Bloc” which paid particular attention to teacher training, like Hungary and Czechoslovakia.

Bulgarian inservice teacher training will be outlined here in more detail. Although the system has today as good as vanished, it yet has a considerable influence on the habits and expectations of the teaching body, as insiders report. Anyone growing up with this system would argue that these organizational methods proved their effectiveness over the decades and that the staff who used to work in this system associated their feeling of self-worth with it.

Inservice teacher training in the period 1975 to 1990 rested on four pillars: schools, local education authorities, teacher training institutes and higher education. At the school level a professional committee organized meetings twice a month for the exchange of experience. A full teachers' meeting (*učitel'ski savét*) was also held once a month, devoted to one particular aspect of methodology.

At local authority level, the education inspectors responsible for individual subjects arranged methodology meetings for teachers four times a year, to which outside speakers, usually higher education lecturers, were invited. The teacher training institutes (IUU, *Institút za usäväršénstvane na učitelite*) in Sofia, Stara

²⁴ (Upper) secondary schools of various types. For full details see p. 57 ff.

Zagora and Varna provided inservice training for teachers who had at least so-called “half-higher” education²⁵ and taught in Years 4 to 8 in Middle schools. Monthly and weekly courses were held, for which teachers were released from school, for the purpose of general training or for the introduction of new curricula.

In the universities which trained teaching staff (primarily Sofia, Plovdiv and Šumen), teachers with higher education degrees (who were teaching in Years 9 to 11) received further training. Once a year, a specialist course was given in each teacher’s subject, ending with an examination and a final dissertation. In Sofia, for example, the work on methodology was led in the period 1975 to 1990 by the Centre for Postgraduate Inservice and Teacher Training (*Céntăr za sléd-diplomna kvalifikácija i usăvăršénstvane na učitelite*, CSKUU). In every administrative district (*rajón*) there was a methodology specialist for each subject (*učitel metodíst*) who worked half-time as a normal teacher but on the other three days of the week monitored and headed the work of the subject teachers in the schools in that region.

At that time there were the following levels of additional qualification for teachers: the lowest level (Class III) was awarded to teachers at the discretion of the school head council (*direkciónen săvét*). It brought a salary increment of ten leva (the basic salary then being 190 to 200 leva). Class II was reached after a one-year course leading to an examination at a higher education institution²⁶ or an IUU. The salary supplement was 30 leva. Teachers who had reached Class II, had distinguished themselves through significant publications on academic or methodological issues and demonstrated a high level of professionalism could attain Class I, when the salary supplement was 60 leva. There were also the honorific titles “Teacher of Merit” (*zaslúžil učitel*) with a salary supplement of 60 leva, and “People’s Teacher” (*naróden učitel*) with a supplement of 100 leva.

The inservice training system for teachers thus offered financial and intangible incentives and professional advancement.

²⁵ *Pólúvísše obrazovánie*: a special type of training following middle education for a number of occupations. Courses typically lasted two or three years, with the emphasis on practical skills rather than theory. In the context of education, “half-higher education” was used mainly for teachers and propaganda experts.

²⁶ *VUZ* = *vísše učébnó zavedénie*, see above, footnote 12.

Political and Cultural Education

Most of the non-vocational educational provision in the People's Republic was in the areas of culture and politics, the political education being marked by the appropriate ideology.

In the 1950s and '60s, there were so-called people's universities (*narodni universitěti*) in many places. These were often attached to cultural centres (*čitališta*) and provided teaching in the form of lectures and discussions.²⁷ devoted to various topics in science or popular science. The questions put by participants also provided a way of establishing "public opinion" or the opinion of the "masses", either on the international situation or on social issues that might prove a threat to the system. These activities were held once a week or fortnight on a fixed day of the week. The time and place of the activity was widely advertised in various ways – through posters, flyers and personal invitations to opinion-formers, whose presence increased the multiplication effect.

In the grassroots Party organizations (especially at places of work) "schools of communist labour" were also organized to discuss practical production issues as well as matters of morals, health and aesthetics.

Educational activities of the Fatherland Front

The educational activities of the "Fatherland Front" (*Otėčestven front*, OF) form a separate topic of adult education in socialist Bulgaria. Like the "National Front" in the GDR, this mass organization was intended to bring together all social forces and to place them under the leadership of the Communist Party. The National Encyclopaedia of socialist Bulgaria therefore called the OF, in best socialist mannerism, an "all-embracing socio-political organization and national movement, the incarnation of national unity, of the solidarity of the working class, the working peasantry and the national intelligentsia, the expression of the joint labour of Communists, organized landowners and non-Party members."²⁸ The OF had its

²⁷ The term *besėda* is often used in Bulgaria in the context of education, and indeed of the Church. It may refer to teaching activities of all kinds, but *besėda* tends to mean a discussion of a prescribed topic.

²⁸ *Enciklopedija Bėlgarija*, Vol. 4, under "Otečestven front".

roots originally in politics: a “Fatherland Front” of opposition parties and other opposition groups was formed in 1942 under the leadership of underground communists. When Soviet troops marched in in September 1944, this alliance seized power as the “Government of the Fatherland Front”. A number of different parties and groupings took part in a loose coalition, but the strategically important Ministries went to the communists, who could therefore control further developments more effectively. The Soviet military presence guaranteed this status quo. A few years later the character of a political coalition was abandoned, and the OF was expanded to form a mass organization. A series of member organizations such as the Farmers’ Union and the Women’s Association either split away or were completely absorbed by the OF.

The functions of the OF oscillated over the years between politics and culture. However, it always remained an important instrument of social management and control. It was crucial to its operation “to educate the population in the patriotic and socialist spirit and to support the leadership of the people among the masses.” In the early 1980s, the OF had 4.3 million members according to official figures – roughly half the population. The extent to which membership was acknowledged and actively pursued by members is another matter, however. For many people membership probably meant no more than paying the membership fee; aside from that it meant a trip to the nearest OF office (there were such offices in every residential area) if a certificate of good repute had to be collected to apply for a new job or a university place. By this method the OF organization guaranteed the good behaviour of the population throughout the country.

People today will assess the role of the OF quite differently, depending on how they stood in relation to Communist Party rule at the time, and how they see the period up to 1989 in retrospect. Anyone close to the system at the time will have a more positive view of the OF with its village and district committees, its brigades, its care for public spaces such as parks, and its lecture meetings. Those who were at a remove from the system or suffered under it will see the OF instead as an instrument of social control and discipline, of which people were forced to be nominal members.

There will therefore be a wide spread of opinion on the role played by the OF in adult education. The proceedings of the OF congresses of the 1980s contained separate sections on education, in which congress participants raised questions about school education and adult education, and put forward their own sugges-

tions on matters including literacy for the Roma. The close connection between the OF and hobby and amateur groups (*samodějci*) is also stressed.

On the other side, the view is now heard that the scale of OF educational activities was largely fictitious, despite being proclaimed in official pronouncements. Like much else in the socialist era, there was often a wide gap between what was said and what actually happened. There can however, be no disputing that OF educational activities had a largely ideological purpose, and that the teaching of other knowledge and skills played a subordinate role, if any.

Communist Party Education

As for Communist Party education in a more specific sense, there were in the 1960s so-called evening Party universities and evening Party schools (*večérni partijni universitěti*, VPU, and *večérni partijni škóli*), the former largely in the major administrative centres (regional capitals), and the latter in smaller towns. The courses which these offered lasted one or two years, sometimes even three, depending on the topic and the region. They were divided into so-called “faculties” such as history, philosophy and economics. The most important were the “faculties of economics” (*fakultěti po stopánska dějnost*), in which practical and theoretical subjects were taught. There were also subjects such as propaganda, Marxism-Leninism, history and philosophy.

In order to describe the VPU system, we will take Sofia as an example. The VPU in Sofia served as the base for training propaganda staff and spreading the teachings of Marxism-Leninism among the personnel of the Sofia Party organization. Up until 1965, around 1000 to 1500 participants attended the courses every year. These were cadres from the Party, industry and government, as well as personalities from the academic world, arts and culture. The VPU was managed by five people: the honorary Rector, the Vice Rector and three Deans. Besides their administrative duties, they also provided tuition in some subjects. About half the teachers worked on a voluntary basis (*“na obštěstveni načála”*). Some subjects were taught exclusively by the staff of the relevant institutions of higher education and universities. Overall management was in the hands of a council (*učěben sávět*) which met regularly to decide key issues.

Three types of course were provided:

- Courses through which propaganda activists could deepen their knowledge of the basic disciplines of Party education: political economy, Marxist-Leninist philosophy, scientific communism, Marxist-Leninist aesthetics, Marxist-Leninist ethics, communist education, industrial economics, economics of construction, history of the CPSU, history of the BCP, history of the international workers' movement and the communist movement.
- Courses on special topics for various occupational groups such as academics, teachers, higher education lecturers and engineers, including philosophical questions in physics, chemistry, mathematics and biology. There were also courses in Marxist-Leninist aesthetics for those working in artistic occupations, especially in the theatres in the capital, courses in scientific atheism particularly for propaganda staff from the villages, courses in communist education for sportspeople, courses in export trade management for heads of export enterprises, courses in agriculture for agronomists, stock-breeding technicians and members of similar occupational groups.
- Separate branches in enterprises and organizations with special needs-oriented courses given by higher education lecturers under the direction of the local evening Party university (VPU). Most of these courses were in towns and cities where major enterprises were situated.

After the first VPU was opened in Sofia in 1945, more were established in other towns and cities during the 1950s and '60s as industrialization spread and major enterprises were created. In Plovdiv, for example, the City Committee of the BCP had only one two-year evening Party school in 1953/54 with 80 participants. Ten years later there were seven two-year and 22 one-year courses with a total of nearly 1200 participants.

The teaching was organized in semesters, and the academic year generally began in September/October and lasted until May or June, depending on the region. In January there were consultations, colloquies and examinations. Most teaching took place for two to three hours once or twice a week in the evenings so that participants did not miss work. At the VPU in the town of Pleven in northern Bulgaria, for instance, it was usual for the teaching to be arranged on the first two days of the working week between 18.00 and 20.00, i.e., a total of four hours a week.

Every course (called a *škóla*) was led by a tutor. The tutors were principally lecturers from the “ideological” faculties of higher education institutions (politics and Party affairs, history of the BCP, Marxist-Leninist philosophy, economics). The others had to have at least ten years’ experience as Party and propaganda activists.

The individual regions had some freedom over the way in which teaching was organized, but the subject-matter was heavily centralized. Every syllabus had to be approved by the higher echelons of the Party, although new subjects could be created at the request of a group of learners.

One-year courses were taught to people who had been selected to take part. There was no participation by the general public since the courses were specifically directed at loyal Party members, and a certain prestige attached to being chosen to participate.

Courses were updated every year. The length was reduced from three years in the 1950s to two years or one year in the late ’60s. The number of subjects taught on a course also fell at that time, and training became increasingly specialized.

The method used was predominantly frontal lecturing by the teacher (*lekciónen método*), and great attention was devoted to clear explanation of the topic. The teaching might also take the form of seminars in which participants gave short papers and discussed the topic after the teacher had spoken. Other methods were personal conversation, which was used largely to form opinion, and “public” lectures, although “public” only meant that sessions were open to all VPU course participants regardless of their particular subject.

One significant element of this type of adult education was the checking of participants’ active involvement, opinions, educational success and attendance. A permanent check was kept at several levels: by the teacher, by commissions set up by the municipal Party committees, and by colleagues and superiors at the workplace. Learning achievement was recorded by the results being either sent to the appropriate Party organization or announced to participants at works council meetings (*prófsăbranie*). A similar procedure was adopted for attendance checks. In theory, inadequate commitment to the educational process could lead to dismissal from the place of work, or at least to public denunciation.

An element of competition was often created. Non-pecuniary incentives such as orders and distinctions were introduced and awarded, and particular success was rewarded with gifts, usually books. Group visits abroad to neighbouring socialist countries (*ekskúrsii*) were particularly sought-after prizes; these were regarded as prestigious and were difficult to come by, especially in earlier periods such as the 1960s.

As regards prior education, the VPU system was very open. There were no strict educational criteria for participation. What counted instead was political reliability and loyalty to the Party. Half of VPU participants were usually higher education graduates, and the remainder had generally completed upper secondary “middle” education (*srédno obrazovanie*), although there might be one or two people on a course who had only completed eight-year basic education (*osnovno obrazovanie*).

In the reverse direction, however, participants in these courses wanted to know whether their VPU certificates would be recognised by normal higher education institutions as contributing to a degree. This was not clearly regulated, and often depended on the personal opinion of the higher education staff in question. VPUs were therefore popular “backdoors” to formal higher education because the entry requirements were lower and the syllabuses less taxing.

In the beginning, VPU courses were genuinely designed as a form of higher education, which means that they were relatively demanding, were general in approach, covered large amounts of material and included some examinations. But this led to the weaker participants dropping out, and these were often the very people who would never have got into higher education in the normal way. As a result, the subject-matter in the VPUs was considerably reduced, particularly at the expense of the general subjects, and the emphasis was placed on practical matters and practical skills.

This type of adult education had the side-effect of stimulating informal education (often self-education), since participants were able to use the library of the local Party office. This was attractive because books could be found there to which the average citizen had no access.

In the 1970s, the VPUs and the evening Party schools had significant resources in terms of staffing, methodology and organizational experience for the training of senior staff involved in the management of society. Later, however, they were

then gradually closed down or turned into some other kind of educational institution. A reason was, most likely, that the need for ideological training and retraining had declined over the years. Anyone born in 1945 was 25 years old by 1970, and had therefore grown up entirely in the socialist system. Hence, it was possible to reduce the ideological emphasis of the adult education programme somewhat and to concentrate more on teaching general topics, although the teaching was naturally still committed to creating a socialist society. Depending on local circumstances, the evening Party schools became either separate academic institutions, departments of existing higher education institutions, regional educational institutions or voluntary associations.

Thus, the VPU became as well the origin of the *Znánie* associations,²⁹ which are today once again playing an important role in Bulgarian adult education, after a post-socialist process of transformation. They go back to the “Georgi Kirkov Society for the Dissemination of Scientific Knowledge” (*Družestvo za razprostranénie na naučni znánija “Georgi Kirkov”*), which was set up in 1971. In the *Enciklopedija Bălgarija* this is described as the immediate successor to the evening Party schools,³⁰ although this tradition no longer plays any practical part in the presents activities of the *Znánie* associations. The aim of the Georgi Kirkov Society at the time was to teach sociology, law and natural sciences. According to the communist way of thinking – and in accordance with the Bulgarian Constitution of the time – the Bulgarian state and the Bulgarian Communist Party were one inseparable whole. Scarcely anyone would have imagined that it was possible to distinguish between the interests of society in general and those of the Party. The question whether the Kirkov Society was aimed at political indoctrination or delivered “real” education is therefore difficult to answer. We cannot make a definitive judgment, but will quote the opinion of someone who was familiar with the education system, having worked in it for many years, and said when interviewed by us: “I think the Georgi Kirkov Society and the *Znánie* associations in the provincial capitals did genuinely disseminate academic knowledge locally. They arranged round tables, lectures and discussions, which was sensible because that way lecturers visited even the remotest villages, and the inhabitants discovered a lot of new and useful things, completely free of charge. But of course at the same

²⁹ See p. 221 ff.

³⁰ *Enciklopedija Bălgarija*, Vol. 2. Sofia 1981. p. 443 under “*Družestvo za razprostranénie na naučni znánija „Georgi Kirkov”*”.

time they spread topical political information and ideological knowledge. The Party and the state were one. No one can say which took precedence – enlightenment or ideology, at least in the first ten to fifteen years... It seems to me that in the last five to seven years before the change of regime, ideology did then take over, but that is easily explained because the system was beginning to totter, and there was a need to give people some explanation for why they had to put up with things that were unacceptable and to promise them a better future.”

1.4 Adult Education under Socialism - Summary

Overall, adult education in the socialist era was well-organized primarily in the area of propaganda and agitation, as well as in the inservice training of teachers, and also to a large extent in the social sciences and administration, economics, politics and international relations. The effectiveness of training within enterprises and of continuing vocational training is a matter of dispute.

Adult education took many forms, using all possible channels of communication including radio and television: in the 1980s, there were several radio and television programmes on topics such as culture and languages, agriculture and international relations.

Educational provision was as a matter of principle free of charge for the user. However, education was often delivered under psychological pressure (fear of dismissal or humiliation), especially in the early stages of the socialist era. Later on, when more inservice training was provided during working hours, it became more popular among workers, but it also attracted people who did not enjoy their work. Towards the end of the socialist period, adult education lost much of its prestige and legitimacy, and new types of institution took its place.³¹

One beneficial inheritance from the socialist era is the dense network of educational institutions, professional contacts and staff trained to organize educational activities of all kinds. A large proportion of these staff transferred to the private sector after the change of political regime in 1989/90, but even more went over to the new NGOs, foundations and voluntary associations that were set up to pro-

³¹ See the dissertation by Kornelija Ilieva, to appear provisionally in 2006.

vide education, largely with financial support from abroad. The Bulgarian state, on the other hand, withdrew increasingly from adult education.

The Issue of Lifelong Learning

As a result of belonging to the former Soviet-dominated economic bloc, Bulgaria has the disadvantage today that wide swathes of the state-managed economy got out of the habit of innovating after the Second World War, at least by comparison with the dynamic development in the part of the world that was operating a market economy. Sluggish technological innovation also left little room for the general population to develop the willingness to innovate. To put it simply, turners, welders, miners and tractor-drivers learnt their jobs when they were young and did them more or less without change until they retired. There was little or no need for inservice training because the technological basis changed relatively little. Despite the grand pronouncements about human beings constantly learning in a socialist society, “lifelong learning” is therefore far less well-rooted in the former socialist states than in the West. (That being said, there were considerable differences within the socialist camp. The GDR and Hungary, for example, are described by insiders as having broadly welcomed innovation and continuing training.)

Adult Education after the Change of Regime

The economic and social changes that began to occur in 1989 had differing effects on the various forms of adult education. Because production fell sharply and whole sectors of industry collapsed, almost all in-house training centres closed within a short period. School-based adult education remained, however, although interest in this provision rapidly fell in favour of short-term retraining courses, for which there was heavy demand in the wake of rising unemployment. Private establishments began to offer an alternative to the state system of initial and inservice training, and were subject to checks by state agencies only “on the way in” (when they first opened) and “on the way out” (when they needed approval to hold examinations and issue certificates, etc., at the ends of courses).

Thus, a market for training services developed in the period 1990 to 1996 that was huge by Bulgarian standards. In 2001 over 400 educational establishments

of varying legal status were registered to provide formal and informal occupational and skills training and retraining.

The National Agency for Vocational Education and Training (NAPOO) was set up in 2002 to help to improve control of non-governmental providers of vocational training. This will be discussed in more detail in Section 3.5.5 of this book, from page 168.

2 The Formal Education System

2006 was a crucial year for Bulgarian education. This year has been declared the starting year for a comprehensive reform of the education system as a whole. In summer 2006 the Ministry of Education published a reform strategy intended to modernize the system by 2015 in several stages which (it is claimed) will bring about profound changes. Some of the reforms are expected to be implemented immediately, while others will need more time for preparation.

This chapter will first describe the present system of general school education. In a special section (section 2.10, starting on p. 114), added in August 2006 to the book, the reform programme will be presented.

Because the features of the school system are undergoing constant reform, what is described below may change rapidly. This is true even for the number of schools, which – as one part of the reform – is to be updated to reflect recent demographic developments, etc.

2.1 Types of Schools

There are quite a number of different types of school in the Bulgarian system of general school education. One reason is, that vocational education and training are closely linked to general education. This goes back to the design of education during the socialist era, which aimed to provide young people with a fairly definite area of vocational competence while still at school. Today there are very many Vocational Schools and Vocational *gimnázii* (upper secondary schools) in Bulgaria which provide vocational training alongside middle-school education. The combination of various types general and vocational education results in a wide range of courses, between which pupils may in principle choose.

The upshot is that different types of school may serve one and the same educational aim. Eight-year basic education (*osnóvno obrazovánie*) may, for example, be taught both at basic schools designed for that purpose (*osnóvni učilišta*), at Middle schools with a full 12 to 13-year programme which includes basic education and ultimately leads to completion of middle-level education (*srédno obrazovánie*), at *prógimnazii* teaching Years 5 to 8, or at *gimnázii* (from Year 9), and indeed at certain vocational schools which provide both elementary vocational

training and basic education (*osnovno obrazovanie*). The existing types of school are described briefly in the list set out below. The list is enshrined in the Education Act¹, albeit in a different order and, of course, without the explanatory comments and figures added here.

Another way of looking at the Bulgarian education system would be to examine the various courses that can be taken at the different types of school, rather than the schools themselves. These courses are defined by legal provisions and will be described in greater detail in Section 2.3 („Stages of Education“, from p. 77) in the context of their ISCED level.

Kindergarten (*détska gradina*): In the school year 2005/2006 there were 3331 in Bulgaria, 34 of them private.

First school (*načalno učilište*): Years 1 to 4. In the school year 2005/2006, 277 pure first schools were in operation, five of them private.²

Basic school (*osnovno učilište*): Years 1 to 8. This is the most common type of school, the task of which is to teach the eight years of basic education (*osnovno obrazovanie*) which is similar (and compulsory) for all pupils. In the school year 2005/2006 there were 1872 basic schools in Bulgaria, 21 of them private. – According to the education reform strategy published in 2006 (uniform) *osnovno obrazovanie* will be reduced to seven years, to be completed by a special examination. Nevertheless, compulsory education is not finished then, since school education remains compulsory up to the age of 16. Years 8, 9 and 10 then will be provided for by other types of schools, e. g. *gimnázii*).

Prógimnázija:³ Years 5 to 8. This type of school is relatively rare as a separate institution. In the school year 2005/2006 there were 21 autonomous *prógimnazii* (two of them private). Years 5 to 8 of basic education are often described in Bulgarian as “*prógimnazija* education” (*progimnaziálno obrazovanie*).

¹ *Zakón za narodnata prosvéta*

² See Table 5 in the Appendix for the exact figures.

³ The terms *prógimnazija* and *gimnázija* are left in the Bulgarian original since there is no exact equivalent in English. “Junior and senior grammar school” might be the nearest approximation. Also “Lower secondary school” and “Upper secondary school” good translations.

Middle school, or General Secondary School, *srédno óbštobrazovátelno učilište* (SOU), literally “middle general education school”: Usually Years 1 to 12, and in some cases also Year 13. After Basic schools and Vocational *gimnázii* the commonest type of school, there being 419 in the school year 2005/2006, four of them private. These schools are the conventional way of acquiring “middle” education” (*srédno obrazovanie*, i.e. upper secondary education).⁴ A few Middle schools do not offer the first four years of basic education. These schools, then, are not comprised by the notion “SOU”.

Gimnázija (or Upper Secondary School), Years 9 to 12, and **profile gimnázija** (*profilirana gimnázija*, Profile upper secondary school), Years 8 to 12 or 13. At the last count (2005/2006) there were 168 *gimnázii*, 26 of them private. Profile *gimnázii* differ from general *gimnázii* in their particular area of specialism and the length of courses (five years, and occasionally six years, instead of the usual four). Profile *gimnázii* are more highly regarded. In order to attend a profile *gimnázija* it is necessary to pass a special examination. The well-known foreign language *gimnázii*, where much of the teaching is conducted in the foreign language (frequently German or English) are such profile *gimnázii*.

Vocational gimnázija (*profesionálna gimnázija*), or Vocational upper secondary school : From Year 8 or 9 to Year 12 or 13. In the school year 2004/2005 there were 453 of these, 25 of them private. The law states that Vocational *gimnázii* are to provide general education plus Level 2 vocational training (four-year course) or Level 3 vocational training (five or six-year course).⁵ Pupils are admitted on completion of basic education (i.e. after Year 8), or after Year 7. Vocational *gimnázii* may also offer purely vocational (Level 1) rather than general courses. With special approval, Vocational *gimnázii* may also offer Level 4 vocational training (ZPOO s. 19 para. 3), which is usually provided by Vocational colleges (*profesionálni koléži*).⁶ – Until 2003, today’s Vocational *gimnázii* mostly were known as “SPTUs” (*srédno profesionálno techničesko učilište*), if they provided Level 2

⁴ Bulgarian middle schools therefore have nothing to do with the term “middle school” as used in the UK, which refers to schools for pupils aged 8 to 12 or 13 years. A Bulgarian middle school includes upper secondary education providing preparation for higher education.

⁵ For the four levels of vocational training see p. 67.

⁶ All this refers to the present (2006/2007) system, not to the changes planned by the education reform strategy for 2006 to 2015.

vocational training and as *téxnikum* (usual plural form in Bulgarian: *téxnikumi*) if they provided Level 3. The old names are often used even at present, in a more colloquial manner of speaking, although they are not properly correct.

Vocational school (*profesionálno učilište*): The current task of vocational schools is to provide uniform basic education (*osnóvno obrazovánie*) in combination with simple vocational (Level 1) training. There are also three-year courses from Year 7 (therefore still including basic education, *osnóvno obrazovánie*) or two-year courses from Year 8 or 9. – However, vocational schools may now also offer courses leading to middle (secondary) education and Level 2 vocational training. – The main difference from Vocational *gimnázii* is therefore that pupils can transfer to a Vocational school after Year 6 and that the training usually only goes as far as Level 1, and in exceptional cases Level 2. – These schools have little practical significance, however, as there are few of them: in the school year 2005/2006 only five were in operation. – Until 2002/2003 vocational schools used to be known as “PTUs” (*profesionálno techničesko učilište*).⁷

Vocational college (*profesionálen koléž sled srédno obrazovánie*). The main feature of Vocational colleges is that they (and only they; exception see above at “Vocational *Gimnázija*”) provide Level 4 vocational training. The length of training depends on the student’s previous training in the specific field, but lasts at most two years. Completion of middle education (*srédno obrazovánie*) is a condition of admission. Hence, these colleges teach pure vocational training and no general education. At the last count, 17 Vocational colleges were registered, all of them private. – Vocational colleges should not be confused with the quite similarly named *koléži* (colleges of vocational higher education or vocational university courses).⁸

Sports school (*spórtno učilište*). Sports schools are at the same level as profile *gimnázii* and therefore provide (profiled) middle education. They cover Years 8 to 12. At the last count there were 17 of them.

⁷ Where the term “Vocational school” is used in what follows, it refers to this particular type of school. When “all types of schools providing vocational education” is meant, we use “vocational schools” with all lower case letters. The term “vocational schools and colleges” is used as a collective term covering Vocational schools, Vocational *gimnázii* and Vocational colleges.

⁸ These are described in the section on higher education from p. 90, especially from p. 92

Art school (*učilište po izkústvata*). In the school year 2005/2006, 20 Art schools were in operation, one of them private. The law states that Art schools are to provide general middle education plus Level 3 vocational training and can therefore be compared to Vocational *gimnázii*.

Culture school (*učilište po kultúrata*). This type of school has been introduced in an 2006 amendment of the Education Act. It is not really of practical importance, since it gives only a new legal definition to two schools in Sofia, as comes clear from the parliament minutes. These schools are the “National *Gimnázija* for Classic Languages and Culture” and the “National Teaching Centre for Culture and Italian language”.⁹

Special schools (*speciálno učilište*). This term may refer to schools for children with particular educational needs, such as deaf-mutes, or to schools in particular situations, such as prison schools. They teach at various levels, depending on the abilities of the pupils or students. Most cover basic education, some middle education, and many also teach vocational skills. In 2004/2005 there were 127 special schools, 72 of them for mentally retarded, 25 for convalescent and speech impaired children, 18 social-pedagogic boarding schools, and 6 for hard hearing or visually handicapped children. – The number of schools for children with particular educational needs probably will go down in years to come, because Bulgaria recently is running a programme to integrate such children into the classes of the common school system. Children with special needs there are to be helped by specially trained additional teachers.

These are the types of school set out in the Education Act. Because of their considerable significance for adult education, another kind of educational institution should also be mentioned in this introductory overview. These are **Vocational Training Centres** (CPOs, *céntrove za profesionálno obučenie*), for which licences have been issued since 2002/2003. They may be run by the state, the local authorities or private providers and are licensed by the National Agency for Vocational Education and Training (NAPOO) to teach vocational courses for specific occupations stated in the licence. They are by nature addressed primarily to adults rather than children and young people. The CPOs are entitled to award

⁹ *Nacionálna gimnázija za drévni ezíci i kultúra*, www.ngdek.com;
Nacionálen učében kompléks po kultúra s licéj za izučávane na italiánski ezík,
www.nukk.org

certificates of vocational training at Levels 1 to 3, in the same way as the vocational schools and colleges in the formal system. Following European standards (as used for example by Eurostat) such courses should be regarded as formal education. However, shorter trainings and courses (for example concerning only a “part of a profession”, are regarded as belonging to non-formal education. CPOs are treated more fully from p. 185. By April 2007, when this book went to print, NAPOO had issued about 420 licences.

For types of **higher education** institutions see p. 90, the beginning of the section on Higher education.

2.2 Legal Bases

By tradition, Bulgarian legislation has some characteristics which make it different from, for example, German legislation. Namely, a relatively large share of regulations are not provided for by laws (enacted by the parliament), but by other Acts of sub-legislative level, for example administrative regulations of a Ministry or another authority, a mayor, a district administration and so on. This is mainly an inheritance from socialist times. There is criticism that without a strong legal basis, enacted by the parliament, citizens are hindered in their right of democratic control. This is true especially in education, where some years ago a thicket of assertedly about 3000 sub-legal regulations were in force which nobody could keep track of, and which often even were contradictive. Bulgarian politicians, of course, are aware of the problem, especially because of EU requirements, and in the meantime much has been done to reduce the number of such orders, regulations and decrees. But much remains to be done yet. Thus, the several Acts which we present in what follows often provide only for a very loose framework of rules which then is completed by a lot of more concrete sub-legal regulations.

The four most important Acts which govern Education in Bulgaria currently are the

- Education Act (*Zakón za národnata prosvéta*, ZNP)
- Stages of Education, Minimum Standards of General Education and Curriculum Act (*Zakón za stépenite na obrazovánie, óbštóobrazovátelnija minimum i učébnija plan*), hereafter referred to in short as the “Stages of Education Act”

- Vocational Education and Training Act (*Zakón za profesionálnoto obrazovanie i obučenie*, ZPOO)
- Higher Education Act (*Zakón za viššeto obrazovanie*, ZVO)

In a more general sense, the 1991 Constitution lays down the right to education, equal educational opportunity, and freedom of teaching.

Vocational education and training (VET), which is of special interest in this book, is covered by the Acts governing general education, but specifically by the Vocational Education and Training Act, as will be seen in more detail below. Further regulations affecting the education and training market are to be found in the Labour Code (*Kódeks na trudá*), in the Employment Promotion Act (*Zakón za nasárcávane na zaetosttá*) and in the Trades Act (*Zakón za zanajátite*).

Concerning higher education, there are two more Acts, however with little meaning for the topic of this book: the Academic Degrees Act (*Zakón za náúčnite stépeni i náúčnite zvánija*) and the Research Promotion Act (*Zakón za nasárcávane na náúčnite izslédvanija*)

2.2.1 Education Act (ZNP)

The Education Act (*Zakón za národnata prosvéta*) was adopted in 1991 and has been amended and expanded several times since. The aim of the initial version was to alter the legal basis that had applied until 1989 and to match the education system to the new requirements of a democratic society and the market economy. The 1991 Act removed a number of totalitarian principles from the education system and put an end to the ideological influence of the Communist Party.

The Act governs – on at present 23 pages of text – both pre-school and school education, and the activities of support institutions such as hostels and convalescence centres, prescribing their structure, functions and administration. The Act lays down the rules for the satisfactory completion of eight-year basic education and middle education (*srédno obrazovanie*, which provides admittance to higher education) by means of “National Education Standards” (DOI), and prescribes the general education curriculum for pupils.

Main chapters of the Education Act concern:

- National education standards (their contents in general, the way they are enacted)
- Kindergartens (dealing with the age of the children, state funding, taxes, the right to choose a kindergarten, provisions for children with special pedagogic needs)
- Schools (defining i.a. the basic levels of education like basic, middle and professional education, examinations, certificates, preconditions for a pupil enter a specific education programme)
- Administration and provision of resources (authorities, school administration, funding)
- School support associations (*nastojateľstva*, an explanation what are these is to be found in the footnote on p. 135.)
- Disciplinary measures (defining sanctions e. g. in case parents do not send their children to school, institutions running classes without licence, etc.)

2.2.2 Stages of Education Act (ZSOOMUP)

The “Stages of Education, Minimum Standards of General Education and Curriculum Act” (*Zakón za stépenite na obrazovanie, óbšttoobrazovateľnija minimum i učébnija plan*) dates from 1999, with several amendment since. On its about six pages, it sets out norms for eight-year basic education (*osnovno obrazovanie*) and middle education (*srédno obrazovanie*). It also lays down the requirements for successful completion of each stage of education and for transfer to the next stage. The Act prescribes standards for general education and for the knowledge and skills expected of pupils at each stage of education. Another important element of the Act is the curricula of compulsory and optional subjects for the various types of school, including vocational schools.

The 1999 Stages of Education Act extended normal schooling from eleven to twelve years in order to bring it in line with European norms.

A 2002 amendment to the Act also introduced a centralized national upper secondary examination called *dăržaven zrélosten izpit* (“state maturation examination”), commonly referred to as *matúra*. Success in the *matúra* will thereafter be

the requirement for admission to higher education (ZSOOMUP s. 7 para. 4).¹⁰ Details as how these examinations have to be organised are to be defined in the Education Act and further Acts (ZSOOMUP s. 7 para. 7.). Since 2003 there have been some attempts to apply the *matúra* idea, but several years running the Ministry of Education did not succeed to overcome the various problems. The plan to introduce a *matúra* examination with effect from 2006, i.e. for pupils attending Year 12 in the school year 2005/2006, again failed, and last news in summer 2006 was that *matúra* will be applied from 2008.

2.2.3 Vocational Education and Training Act (ZPOO)

The Vocational Education and Training Act (ZPOO)¹¹ dates from July 1999. Several Amendments have been adopted since then. An amendment in August 2006, for example, concerns regulated professions and the admission of EU citizens. The main provisions of the ZPOO are described in what follows.

The ZPOO governs both

- vocational training in the traditional (**formal**) state school education system, which is intended to suit young people at school and
- vocational education and training outside this system, i.e., **non-formal** vocational training and inservice training for adults, regardless of whether this is provided by state or non-governmental bodies.

Structure of the ZPOO

The ZPOO has the following main sections:

- General requirements concerning the organisation of the VET system. – Subsections are • Vocations and levels of vocational qualification • Conditions of the acquisition of professional qualification c) Organisation of the teaching process.

¹⁰ Before, pupils have only had to take such an examination if they had achieved a mark below 4 in any subject (6 being the best mark and 2 the worst in the Bulgarian system, a 1 only being given as a form of punishment).

¹¹ *Zakón za profesionálnoto obrazovanie i obučenie.*

- Institutions in the VET system
- State education requirements for VET. – Subsections are, inter alia: ● Contents of vocational education and vocational training, ● Practical training, ● VET for pupils with special educational needs, chronic diseases etc.
- Certification of VET
- Administration of the VET system. – Subsections concern ● The National Agency for Vocational Education and Training (NAPOO) ● Function of Ministries, local authorities, other authorities and social partners.
- Funding of VET and vocational orientation.
- Recognition of professional qualification achieved in other countries and admission to such professions in Bulgaria (This is a completely new section, due to the Bulgarian entering the EU).

Important provisions of the ZPOO

In what follows, we summarize some of the provisions of the Vocational Education and Training Act.

a) Responsibilities

Under this Act, vocational education and training are the responsibility of the Ministry of Education and Science (MON)¹², to which the regional education departments (*inspektoráti*) are answerable. The specific roles of the Ministry of Labour and Social Policy, the Health Ministry and the local authorities in the regulation of vocational training, as well as those of the employers' and employees' organizations, are also set out in the Vocational Education and Training Act (s. 51-58). Furthermore, the social partners are involved in the work of the National Vocational Education and Training Agency (NAPOO), taking part on an equal basis in its management and expert committees. (For more details on these committees see p. 169).

¹² *Ministérstvo na obrazovániето i náúkata*, Education Ministry for short..

b) Levels of Vocational Training

The Vocational Education and Training Act lays down four levels of vocational training. These levels apply in principle to all occupations, but the highest level attainable varies, depending on the knowledge and skills required in the occupation in question. The fourth (and highest) level applies, for example, to business economists, television directors and automation technicians. Polymer technicians, jewellers and interior designers go up to Level 3. Level 2 is the highest qualification for occupations such as machine fitter or food industry machine operative, and Level 1 for occupations such as cashier, seamstress, shoemaker and store-keeper.¹³

The following profile of requirements is laid down for qualification at the various levels:

- **VET Level 1:** “Acquisition of job-specific skills for routine tasks under constant conditions”
- **VET Level 2:** “Acquisition of skills for complex activities under changing conditions”
- **VET Level 3:** “Acquisition of skills for complex activities under changing conditions and acceptance of responsibility for the work of others”
- **VET Level 4:** “Acquisition of skills for complex activities under changing conditions, acceptance of responsibility for the work of others and allocation of resources”

These very general statements are then fleshed out in the National Education Standards for vocational education and training (DOI¹⁴), which are either currently (2006) being developed or have already been developed by the National Vocational Education and Training Agency NAPOO.

¹³ Last updated on 8-3-2005 (as for July 2006). The list is available from the Bulgarian National Agency for Vocational Education and Training (NAPOO) on the Internet at www.navet.government.bg/Sections/prof-list.zip

¹⁴ *Dържавни образователни изисквания за професионалното образование i обучение.*

c) Outline Syllabuses for Vocational Training in State Schools

Vocational skills are to be taught in the state vocational education and training system in accordance with special outline syllabuses (*rámkovi prográmi*) which should, according to the Vocational Education and Training Act, be laid down by the Ministry of Education and Science, the broad features being set out in the Act itself. These outline syllabuses should specify among other things the minimum age of candidates at the start of training, their prior education (completion of a particular stage or number of years of education), the duration of their training, the theoretical and practical learning content, and the method of awarding a qualification. Six such outline syllabuses are prescribed in the Act, three of them for basic vocational training.¹⁵ Table 2.1 (p. 70) sets out the requirements of the Act schematically. These six outline syllabuses (A, B, V, G, D, E) for vocational training in the state school system, complemented by the regulations of the Ministry of Education and Science, can be summarized as follows.

Pupils may start basic vocational training at the earliest when they have completed Year 6, that is, generally at the age of twelve years. In the case of pupils who have not yet completed eight-year basic education, the syllabus must always consist of a combination of vocational training and general education. When they finish training, pupils are given a certificate of completion of eight-year basic education (*osnóvno obrazovánie*) and a certificate of the first level of vocational training in the occupation in question. Basic vocational training may also begin later, after completion of Year 7 or Year 8. In such cases, the training lasts either two years or one year.

Basic vocational training after Year 6 or 7 takes place in Vocational schools (*profesionálni učilišta*), or in separate classes at general schools (including special schools). There is basic vocational training after Year 8 in the Vocational schools (*profesionálni učilišta*) and the Vocational gymnázii (*profesionálni gymnázii*). This form of vocational training (leading to a Level 1 qualification) is usually chosen by pupils who do not wish to continue training in Years 9 to 12 at *gimnázija* level.

In the case of basic vocational training in the Vocational *gimnázii* (Level 1 qualifications), pupils complete the curriculum of middle education (*srédno obra-*

¹⁵ The term "basic vocational training" (*načálno profesionálno obučenie*) is described in s. 5 para. 2 point 1 of the Vocational Education and Training Act as "acquisition of initial competence in an occupation or part of an occupation".

zovánie). The additional vocational training for Level 1 vocational qualifications starts in Year 8 or 9, shortly after or immediately after the completion of eight-year basic education (*osnovno obrazovánie*).

Courses for the completion of middle education and Level 2 vocational training last four years (Years 9 to 12) and begin after completion of eight-year basic education. Courses for completion of middle education and Level 3 vocational training last five or six years, depending on the variant: the five-year variant (Years 9 to 13) begins after completion of eight-year basic education. The six-year variant (Years 8 to 13) begins after completion of Year 7, one year earlier than the five-year variant. The six-year courses differ from the five-year only in the higher number of teaching hours in the foreign language in which training is given.

There are compulsory admission examinations for the six-year courses. In the case of the five-year courses, the Vocational *gimnázii* control admissions themselves, either through examinations or on the basis of pupils' previous marks. The private vocational schools decide on their own admission procedures entirely for themselves.

One peculiarity of the last-named courses, which lead to Level 3 vocational qualifications, is that pupils may discontinue training after Year 12 since certificates of completion of middle education (*srédno obrazovánie*) are issued at the end of that year. If pupils decide to discontinue training after Year 12, they may sit the examination for a Level 2 vocational qualification. In practice, the majority of pupils on courses leading to Level 3 vocational qualifications do in fact leave school at the end of Year 12 without reaching Level 3 management skills. Of the 31 300 or so pupils on these courses in the school year 2003/2004, only around 12 900, 41 per cent, went on to Year 13. The others, it may be assumed, moved straight into higher education.

The low esteem in which state vocational training would thus appear to be held points to a problem that will be discussed again later: the lack of market orientation of the state vocational training system in Bulgaria, the consequence of which is that pupils in some fields train for jobs for which there is no demand in the world of work.

Table 2.1 The Six Outline Syllabuses for VET (s. 10-12 ZPOO)

	Educational objective (as set out in the act)	For Students admitted under 16 years of age	For those admitted from 16 years of age	Syllabus details determined by
A	Basic vocational education with Level 1 vocational qualification	Duration: 3 years Requirement: completion of at least Year 6	Duration: 1 year Requirement: completion of at least Year 6	National educational requirements for vocational education and training (DOI, see Foot-note 14)
B	Basic vocational education with Level 2 vocational qualification	Duration: 4 years Requirement: Basic education or at least one year of middle education	Duration: 1 year Requirement: completion of at least one year of middle education; or middle education.	
V	Vocational education with Level 2 or 3 vocational qualification	Duration: 4 or 5 years Requirement: Basic education	Duration: 4 or 5 years Requirement: Basic education	
		Duration: 4 or 5 years Requirement: Basic education		
		In Art schools: Duration: up to 4 years Requirement: Basic education, or one year of middle education		
G	Vocational training Level 4	(no provision)	Duration: 2 years Requirement: Middle education	
D	Basic vocational training for only “part of an occupation”	Duration: up to 1 year Requirement: Basic education or one year of middle education	Duration set by the establishment	The establishment in question But if vocational training is to be given to one of the “levels of vocational qualification”, this must satisfy the requirements of DOI.
E	Continuing training in an existing vocational qualification; also acquisition of Level 1, 2 or 3 vocational qualification.	(no provision)	Duration set by the establishment	

The names of the six outline syllabuses (A,B,V,G,D,E) are the first letters of the Cyrillic alphabet.

d) Formal and non-formal education

The ZPOO creates a framework for vocational education and training for both young people and adults, i.e., for people over and under 16 years of age.¹⁶ Additionally, the ZPOO provides the legal fundamentals for acceptance of non-formal learning, especially by defining rights and duties of CPOs (Vocational Education Centres) together with rights and duties of schools (as institutions of formal education).

Some of the regulations applicable equally to formal and non-formal vocational education and to continuing education and training are:

- The list of recognised occupations (s. 6 of the Act). This is broken down by fields (*óblasti*), occupations (*profésii*) and specialisms (*speciálnosti*) for the purposes of vocational training. This classification is fully compatible with the 1999 Eurostat “Fields of Education and Training” categories.
- Requirements for completion of the four levels of vocational training set out in law (s. 8.3)¹⁷
- Requirements in terms of prior education for admission to one of the four levels of vocational training (s. 8.4)
- Regulations governing which institutions are entitled to offer vocational education and training (s. 9 and 18)
- Provisions governing the certification of vocational training (s. 38)

e) Vocational Training Offered by Independent Providers

The 1999 Vocational Education and Training Act created the basis for fresh regulation of the provision of vocational education and training by private schools, associations and organizations, companies, etc., in other words by educational providers not belonging to the traditional (formal) education system. The Act provides for special licensing of such independent providers by the National Agency for Vocational Education and Training (NAPOO). These licensed vocational training centres (*Céntăr za profesionálno obučenie*, CPO) are described in full in Section 3.5.5 from p. 168 and section 4.3 from p. 185.

¹⁶ Until the age of 16 school education is compulsory in Bulgaria.

¹⁷ See p. 65 ff.

f) State Schools as Providers of Continuing Education

The Vocational Education and Training Act (ZPOO) allows state schools, run either by national government or local authorities, to offer additionally vocational training for adults who would pay a fee (s. 12 and 31 ZPOO). In practice, this has made it possible Vocational *gimnázii* to take on some of the courses for the unemployed commissioned and paid for by local employment offices (*bjurá po trudá*).

g) Funding

The Act provides for the funding of vocational training establishments from various sources: national government, the local authorities, donations, national and international programmes, and income earned by schools themselves (s. 59). This is part of the current approach to encourage schools to increase their budgets by providing services in the regional education and training market. However, in recent years, this has not been working very well. A problem was that earnings had to be passed on to the Ministry of Education and Science, from which they are hardly likely to flow back to the school. Or the Ministry would cut regular financial support to the school proportionately when a school creates its own income. – According to the 2006-2015 education reform plan¹⁸, schools shall get much more autonomy in financial decisions.

h) Establishment of a National Agency for Vocational Education and Training

The provisions governing the administration of formal and non-formal vocational education and training (ZPOO Chapter 6) stipulate that a Vocational Education and Training Agency is to be established to oversee vocational training in Bulgaria. In fact, this National Agency for Vocational Education and Training (*Nacionálna agéncija za profesionálnoto obrazovanie i obučenie*, NAPOO) was set up in 2000.¹⁹ The Agency issues licences for vocational training centres, draws up the list of potential training occupations, formulates the national standards for

¹⁸ See p. 97 ff.

¹⁹ NAPOO itself often uses the English version of its name, NAVET (National Agency for Vocational Education and Training).

the award of vocational qualifications, etc. (NAPOO and the practical aspects of its work will be presented in more detail from p. 168).²⁰

i) List of Vocations for Vocational Training (SPPOO)

In 2001, the VET Agency (NAPOO) has adopted a „List of Vocations for Vocational Education and Training“ (*Spisäk na profesiite za profesionalno obrazovanie i obučenie*, SPPOO). For a description of this documents, see Section 3.2.2 on p. 149.

A Note on Terminology

The two terms “*profesionälno obrazovanie*” and “*profesionälno obučenie*” which constantly recur in the context of education in Bulgaria my rise some problems. We try to explain here their meaning in several contexts. The end of the section about ZPOO is a good place to do this, because the Act itself provides in s. 5.. a definition of the terms in question:

According to the Act, *profesionälno obrazovanie* is vocational training taught alongside general school education. In practice this takes place largely in vocational Middle schools, where pupils learn both special vocational subjects and general subjects such as mathematics and history, at the level of middle education (*srédno obrazovanie*, i.e. upper secondary). Therefore, a good translation in this case is **Middle school vocational education**. On the other hand, *profesionälno obučenie* focuses, according to the Act, on vocational education or training that is devoid of general content. We call it here just **vocational training**. However, in cases when learners have not yet completed eight-year basic education (*osnovno obrazovanie*), contents of general education anyway form – according to the Act– part of the programme of *profesionälno obučenie*.

In everyday usage (where people do not stick so much to legal definitions), the term *profesionälno obučenie* refers not only to vocational curricula in schools but also to the broad field of general vocational preservice and inservice training, etc.

²⁰ The website of the National Agency for Vocational Education and Training is to be found at www.navet.government.bg and contains up-to-date statistical information.

The phrase **profesionálno obrazovanie i obučenje**, which is frequently encountered in official documents, should not be taken to mean simply the sum of the two terms described above, as one might believe. It is instead a general expression used to cover vocational education and training of all kinds. The simplest translation of *Zakón za profesionálno obrazovanie i obučenje* is therefore just “Vocational Education and Training Act”.

(Better do not expect too much logic in Bulgarian legal definitions, so far. We have tried long enough, without really finding a way out of the labyrinth. Bulgarian legislation often is a field of self-contradictory definitions or doomed attempts of being systematic.)

2.2.4 Higher Education Act

The Higher Education Act (*Zakón za visšeto obrazovanie, ZVO*) dates from 1995. Since then it has been amended several times a year. The Act governs the degree of autonomy of institutions of higher education and sets out their functions and how they are to be administered and funded. With its 48 pages it is a quite more detailed legal text than the other Acts mentioned above. Therefore, less will be regulated by sub-legislative regulations as Ministry decrees.

Its main sections are

- Government functions in the administration of higher education
- Types of higher education institutions, and how they can be founded, transformed or shut
- Academic autonomy
- Structure and organization of the teaching in higher education
- Academic staff of higher education institutions
- Honorific titles
- Organization of research in higher education institutions
- Students, doctorate students and *specializánti* (people taking courses for some type of continuing education)
- Accreditation of higher education institutions
- Funding of higher education institutions; their own property assets

- Admission to regulated professions for people which have obtained their education outside of Bulgaria. (This is a complete new section, added in 2006, which came into force when Bulgaria entered the EU in January 2007.

Higher Education Qualifications

The 1995 Act established new kinds of higher education qualification to replace the former system of the socialist era:

- Specialist (*specialist*) for courses lasting at least three years
- Bachelor's (*bakalávěr*) for courses lasting at least four years
- Master's (*magistěr*) for courses lasting at least five years or Bachelor's plus one year
- Doctorate (*dóktor*) for study lasting at least three years after completion of a Master's degree.

Under the higher education system of the socialist People's Republic of Bulgaria, which lasted in practice until 1995, the titles Bachelor and Master did not yet exist. Graduates of higher education received a diploma of higher education (*diplóma za vísše obrazovánie*) on completion of their courses, which lasted between four and a half and six and a half years. The new Higher Education Act of 1995 prescribes that these diplomas are equivalent to a Master's degree (*magistěr*).

Until 1995 there were also institutions teaching "half-higher (or semi-higher) education" (*póluvisše obrazovánie*). These were largely training centres for health service staff, laboratory workers and teachers for pre-primary and primary education. The courses lasted between two and three years.

The "Specialist" degree awarded at colleges of vocational higher education (*koléž*)²¹ or in vocational courses at universities and specialist institutes of higher education (these courses also being known as *koléž*), is peculiar to Bulgaria from

²¹ Not to be confused with "*profesionáln* *koléž*", or Vocational colleges, which provide Level 4 vocational training. For a description of the different types of school and college see p. 57 ff.

the European perspective (and bearing in mind the provisions of the Bologna Process as well). An expert report on Bulgarian higher education published in 2004²² concludes that there is little demand from employers for graduates of such courses. – After demonstrations of college students in early 2007, there was introduced a bill into the Bulgarian parliament that colleges should be allowed to issue Bachelor's degrees instead of specialist's. This might be the end of the "specialist" degree at all. However, colleges first will have to pass an accreditation procedure. The protests had started in colleges of medical training (vocations as laboratory assistants, social workers, dental technicians and assistant pharmacists). The students complained that they study 2.5 years and therefore should have equal rights with Bachelor students. So far, only staff nurses and accoucheuses (midwives) are awarded a Bachelor's degree.²³

Classification of Higher Education Courses

Besides higher education qualifications, the Higher Education Act also provides a classification of higher education courses in accordance with a unique system.²⁴ This system of classification does not fit either the International Standard Classification of Education (ISCED or ISCED-97)²⁵ or the 1999 classification of "Fields of Education and Training" recommended by the European Statistics Office, Eurostat.²⁶

For further details of higher education, especially the division into universities, specialist institutes of higher education and colleges of vocational higher educa-

²² Bahram Bekhradnia (Higher Education Policy Institute): Higher Education in Bulgaria – a Review for the Ministry of Education and Science, Oxford 2004, esp. paras. 89-91. For more information see p. 111, where this study is described in greater detail.

²³ Mediapool, March 3, 2007.

²⁴ *Klasifikátor na oblastite i profesionálnite napravlenija na visšeto obrazovanie.*

²⁵ ISCED is a system enabling the various stages of education in different countries to be classified for the purposes of international comparison. Using the ISCED classification it is possible, for example, to establish the level of British education which corresponds to completion of Bulgarian eight-year basic education. The ISCED system was introduced by UNESCO in 1976; the most recent update was in 1997 – hence the name "ISCED-97". ISCED documentation is available as a pdf file from www.unesco.org. An introduction into ISCED terminology is to be found in the appendix of this book, from p. 321.

²⁶ Andersson, Olsson: Fields of education and training. Manual. Luxembourg 1999. Downloadable from http://fria.fri.utc.sk/fri/dokumenty/koncepcia_skolstva/isced_fl.doc.

tion, and the courses which these offer, see the section on “Higher education” from p. 90.

2.3 Government Plans and Programmes

Important programmatic documents that define education policy in Bulgaria at present (2007) are:

- National Programme for Development of School Education and Pre-School Education and Preparation (*Nacionálna prográma za razvítie na učilištnoto obrazovanie i prádučilištnoto vázpítanie i podgotóvka*).
- National Strategy for Continuing Vocational Training in the Period 2005-2010 (*Nacionálna stratégija za prodálžavašto profesionálno obučenje za períoda 2005-2010 g.*) See Section 1 from p 27 where this strategy is presented in detail.
- National Strategy for Introduction of Information and Communication Technology (*Nacionálna stratégija za vávěždane na informaciónnite i komunikaciónni tehnolóгии*)
- National Research Strategy (*Nacionálna stratégija za naučni izslédvanija*)
- Employment Strategy 2004-2010 (*Stratégija po zaetosttá 2004-2010 g.*).
- National Report “Education and Training 2010 in the Context of the Lisbon Strategy” (*Nacionálen doklád “Obrazovanie i obučenje 2010 v kónteksta na Lísabonskata stratégija”*).
- Concerning the integration of minority groups (chiefly Roma) there is a „Strategy for educational integration of children and pupils of ethnic minorities“, adopted by the Ministry of Education and Science in June 2004 (*Stratégija za obrazovátelna integrácija na decáta i učenícite ot etníčeskite malcínstva*).

For the integration of children with special needs there are additional programmes and plans as follows (as for 2007):

- National programme for integration of children with special education needs and chronic health conditions into the education system, 2004-2007 (*Nacionálen plan za integrírane na decáta sás speciálni obrazovátelni potrébnosti i xronični zaboljávaniija v sistémata na naródnata prosvéta 2004-2007*)
- Regulation for the activity of the resource centres for support and integrative education of children and pupils with special education needs (*Právilnik za*

dejnosťá na resúrnsnité céntrove za podpomágane na integríranoto obučénie i vázpítánie na decá i učeníci sás speciálni obrazovátelni potrébnosti.)

- The Education Reform Programme (see above) provides a section on those children as well.

2.4 Stages of Education

2.4.1 Pre-primary Education

→ ISCED Level 0

→ *prédučilištno obrazovánie*

→ Elementarbildung

Pre-school education for children aged from three to six years is intended primarily to accustom them to everyday school life. In Bulgaria it usually takes place in kindergartens (*détski gradini*) and in some cases in schools. Since 2003, one year's pre-school preparation has been compulsory for children before they start school itself. The state has therefore agreed to fund the compulsory pre-school year, for which parents do not pay fees.

Main regulations concerning kindergarten education are provided by the Education Act. It defines kindergartens as part of the education system (s. 2). Kindergartens are to serve children from the third year until they enter school education (s. 18). Attending kindergarten is not obligatory (s 20a), but there are obligatory one year courses which are to be held either by kindergartens or by schools in order to prepare children for school education. These courses are free of charge (s. 20), whilst for kindergartens there can be a fee. The state has to provide additionally education for children whose mother tongue is not Bulgarian, using specific methodology. (s 20 al. 2).

The school education reform strategy for 2006-2015 does not define new or more specific tasks of the kindergartens, as one could have expected. It mentions kindergartens just in a general way as providers of social and morale education and as preparation to school education. However, the reform programme calls for special measures in order to make sure that children who do not speak Bulgarian as their mother tongue do attend kindergarten more regularly.

According to NSI statistics, in 2005/2006 there were 3331 kindergartens or pre-schools in Bulgaria. Of these, 2421 were all-day, 866 half-day and seasonal, 12 for children with intellectual disabilities and 6 convalescent for children suffering specific health conditions, such as heart conditions. 1740 kindergartens were in villages. Since 2001 the number of pre-schools has increased by 2.7 per cent.

In the years since 1999 the number of children enrolled in pre-school institutions has remained relatively constant, at around 200 000 (see Figure 2.1). This is about 75 per cent of the 260 000 children aged 3-6 years. Factors influencing the stable number of pre-school attendance are a stable birth rate and the introduction of the compulsory pre-school year.²⁷ However, pre-primary education attendance of children is very different for certain ethnic groups. According to a 2003 survey, made by an NGO engaged in minority questions, 35 per cent of Roma children and about 16 per cent of Turkish children had not attended pre-school at all. For comparison, just 6.8 per cent of Bulgarian children, according to the survey, had not attended pre-school.²⁸

2.4.2 Primary Education / First Stage of Basic Education

→ ISCED Level 1

→ *načálno obrazovanie / p̄rvi etáp na osnóvnoto obrazovanie*

→ Grundschulbildung

Primary education in Years 1 to 4 (*načálno obrazovanie*) is the first stage of basic education (*osnóvno obrazovanie*), which covers Years 1 to 8. There are relatively few schools that deliver exclusively primary education (291 pure primary schools in 2004/2005). Most primary education is provided for by basic schools (*osnóvni učilišta*, Years 1 to 8) and Middle schools (SOU, Years 1 to 12) including primary school classes (about 2200 schools of these types).

²⁷ *Nacionalen statističeski institut (NSI): Obrazovanie v Republika Bǎlgarija. Sofia 2004. p. 35-36, and subsequent studies.*

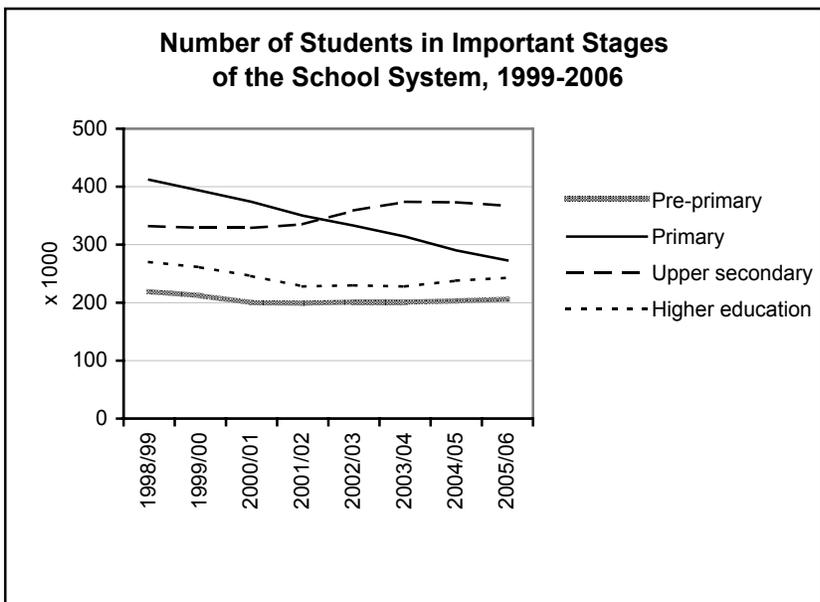
²⁸ International Center for Minority Studies and Inter- Cultural Relations (IMIR): Final Report on the Project: Evaluation of the Existing Policies and Practices for Ensuring Equal Access to Education of Children from Minorities and for Developing Recommendations for a Sustainable Solution of the Educational Problems of the Minorities. Sofia: IMIR, 2004; available at <http://www.ncedi.government.bg> (accessed on 14 January 2006).

The main aim of primary education is to teach basic knowledge, that is, to teach pupils reading, writing and mathematics and to give them an elementary knowledge of the natural sciences, the social sciences, art, music, sport, etc.

Primary education, or the first stage of basic education, lasts four years. Children start school at the age of six or seven years, and they receive a certificate when they complete primary education.

The number of children in the primary school stage of education has been falling for some years. While around 411 700 children were enrolled in primary education in the school year 1998/99, there were only 308 000 in the school year 2003/2004 and 284 000 in the school year 2004/2005.

Figure 2.2



2.4.3 Lower Secondary Education / Second Stage of Basic Education

→ ISCED Level 2

→ *prógimnazialno obrazovanie / vtóri etáp na osnóvnoto obrazovanie*

→ Progymnasiale Bildung / zweite Stufe der Grundbildung

Prógimnazija or lower secondary education, which is also known as the second stage of basic education (*prógimnazialno obrazovanie*, equivalent to ISCED Level 2A), also lasts four years (Years 5 to 8). During this time, the basic knowledge acquired previously is deepened and expanded. Teaching is typically divided into subjects, which are now taught by separate subject teachers.

The education provided at the *prógimnazija* stage may be either general or already vocational. Vocational education at this stage leads to Level 1 vocational qualifications (“acquisition of skills in a particular occupation for routine tasks under constant conditions”).²⁹ The usual age of entry to this stage of education is eleven years. Eight-year uniform basic education (*osnóvno obrazovanie*) concludes with completion of this stage, and pupils are given a certificate to that effect. This certificate is needed by those pupils who wish to continue their education at general or Vocational *gimnázii*.

The number of pupils in *prógimnazija* stage (years 5 to 8, ISCED level 2A) in the school year 2003/2004 was about 303 000 and in 2005/2006 about 295 000. Only about 1800 of them were taking part in vocational courses, which is an indication of their low level of popularity.³⁰

In the school year 2004/2005, *prógimnazija* education was provided in 1877 (2005/2006: 1872) basic schools (*osnóvni učilišta*, Years 1 to 8), 21 (21) *prógimnazii*, 424 (419) Middle schools (SOU) Years 1 to 12 or 13, including primary education) and about 30 pure Middle schools (Years 5 to 12, without primary education).

Although *prógimnazija* education is legally compulsory (since the Education Act prescribes compulsory education until the age of 16), only 84 per cent of children aged eleven to 14 years were enrolled in it on 1 January 2004. In the school year

²⁹ For the four levels of vocational training see the beginning of Chapter 3.

³⁰ Data for 2003/2004.

2002/2003, around 11 200 pupils dropped out (3.2 per cent), 3100 of them (according to NSI data) because they were “unwilling to learn”, 4600 for family reasons, and 1400 because of emigration.

2.4.4 Upper Secondary General and Vocational Education

→ ISCED Level 3

→ General middle education and Vocational middle education

→ *srédno óbšto obrazovánie, srédno profesionálno obrazovánie*

→ Mittlere Bildung (allgemeinbildend oder berufsorientiert)

Upper secondary courses (*srédno obrazovánie*) can be either general or vocational. Courses last between four and six years. The usual age of entry is 15 years, and courses normally begin at the end of Year 8, after completion of eight-year uniform basic education (*osnovno obrazovánie*, ISCED Level 2). However, some vocational courses and some general “profiled” courses in Middle schools begin before pupils have completed eight-year basic education (ISCED Level 2). In this case, pupils are admitted to courses after taking an entrance examination at the end of Year 7.

After completion of middle education (in most cases after Year 12) the students normally try to continue in higher education, which however demands a special additional entrance examination to the respective higher education institution.

In what follows, we describe first the general (i.e. non-vocational) middle education, and afterwards the vocational middle education.

a) Upper Secondary General Education

- ISCED Level 3
- General Middle Education
- *srédno óbštó obrazovánie*
- Allgemeine mittlere Bildung

Regardless of the actual type of school, two kinds of general course are offered in general middle education:

- A **standard course** (non-profiled course, *né-profilírana prográma*), which lasts four years, starting after completion of Year 8, with no special entrance examination
- A course with a **particular teaching profile** (profiled course, *profilírana prográma*), lasting five years and starting after Year 7. In order to enter such a course it is necessary for a child to pass an entrance examination to establish the child's aptitude for deeper study of such subject areas as languages, science or sport etc.

In both cases, the course finishes at the end of Year 12.

Schools offering profiled courses, for which an entrance examination is required, are generally profile *gimnázii (profilírani gimnázii)*. However, there are exceptions. A Middle school (SOU), for example, may also offer a profiled course and thus require an entrance examination.

Currently many profiled courses focus on a Western languages, mathematics, natural sciences, humanities or sport. Of the 167 000 pupils enrolled in the various kinds of non-vocational middle education (*srédno óbštó obrazovánie*) in the school year 2003/2004, two thirds (around 110 300, or 67 per cent) were attending such profiled courses. This demonstrates that profiled courses are appreciably more popular. They enjoy greater prestige, and they promise the prospect of better opportunities in the future. (Figures for the school year 2004/2005 were very similar: 170 000 pupils in general middle education classes, 115 000 of them in profiled courses.)

The number of schools providing general (i.e. non-vocational) middle education in the school year 2004/2005 was 582 (not including the nine special schools offer-

ing this level). Of these 75 had a foreign languages profile, 33 a natural sciences and mathematics profile, 13 a humanities profile, 18 a sports profile and 14 some other profile.

b) Upper Secondary Vocational Education (Vocational Middle Education and Training)

- ISCED Level 3C and 3A
- *srédno profesionálno obrazovanie i obučenie*
- Beruforientierte mittlere Bildung

Vocational middle education and training (*srédno profesionálno obrazovanie i obučenie*, equivalent to ISCED Level 3) in the formal education system comprise three different kinds of courses offered at the various types of school, no particular course being tied to any one type of school. The courses lead to vocational qualifications at Level 1, 2 or 3.³¹

The types of school offering ISCED Level 3 vocational education in Bulgaria are Vocational schools (*profesionálni učilišta*), Vocational *gimnázii* (*profesionálni gimnázii*) and Art schools (*učilišta po izkústvata*). In the school year 2003/2004, the total number of pupils in all three types of school was just over 206 800, in 2004/2005 the number was only slightly smaller.

Level 1 vocational courses (“Acquisition of skills in a particular occupation for routine tasks under constant conditions”) at ISCED Level 3C³² last two years. In the school year 2003/2004 only around 800 pupils, or 0.4 per cent of the total of 211 000 students on vocational courses, were enrolled in such courses. (Figures for 2004/2005 are similar.) The majority of these pupils were training in the fields of production and processing (48 per cent) and services (33 per cent, 2003/2004 figures). These courses are unpopular because they only provide vocational training at the lowest level (Level 1) and do not lead to a certificate of middle-level education (*srédno obrazovanie*). They are purely intended to prepare pupils for

³¹ For the levels of vocational training see above p. 67.

³² ISCED 3C is defined as covering courses providing access to the labour market, or to ISCED Level 4 or other post-ISCED 3 courses (see ISCED-97 Manual, p. 24).

the labour market. Pupils may be admitted on completion of basic education (Year 8), usually at the age of age of 15 years.³³ Such courses leading to Level 1 vocational qualifications at ISCED Level 3C were offered in 2004/05 at five Vocational schools and at some Vocational *gimnázii*.

Level 2 vocational courses (“Acquisition of skills for complex tasks under changing conditions”) are also taught in middle education (*srédno obrazovanie*). They last four years and are equivalent to ISCED Level 3A.³⁴ In 2003/2004 around 43 800 students were taking part in such courses (21 per cent of all students on vocational courses), in 2004/2005 the number was around 41 000. The most popular courses were “technical studies”, with 43 per cent of students, followed by “production and processing” with 19 per cent, “services” with 15 per cent and “commercial studies and administration” with 11 per cent (in 2003/2004).

Courses of this type are often chosen by pupils because they grant access to higher education (by completion of middle education, *srédno obrazovanie*) as well as leading to a Level 2 vocational qualification. This enables those completing such courses to continue their education at a higher education institution or to find more skilled employment.

Students are admitted to these courses on completion of basic education (Year 8), generally at the age of 15 years. Courses of this type (Level 2 vocational training at ISCED Level 3A) were in 2005/2006 offered at around 453 Vocational *gimnázii* (25 of them private) and five Vocational schools. The number of Vocational *gimnazii* thus has been reduced by nearly 50. (For the total number of schools see Appendix Table 8, p. 311.)

Level 3 vocational courses (defined as “Acquisition of skills for complex activities under changing conditions and acceptance of responsibility for the work of others”, equivalent to ISCED 3A), especially the six-year courses, are the most popular among parents and pupils.

³³ These schools also offer courses to which pupils may be admitted at the end of Year 7. These courses are at ISCED Level 2A, however, and are described in more detail above (Section 2.4.3 p. 81).

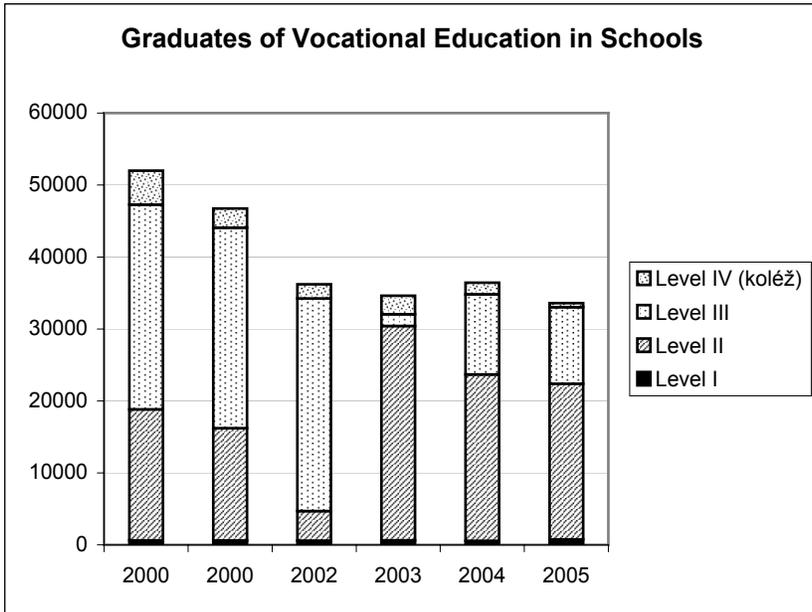
³⁴ ISCED 3A means courses providing access to ISCED 5A courses, i.e. normally to higher education [ISCED 97 Manual, p. 35].

Students are usually admitted to the five-year courses at Vocational *gimnázii* (*profesionálni gimnázii*) at the age of 15 years after completion of eight-year basic education. The six-year courses at Vocational *gimnázii*, on the other hand, generally begin at the age of 14 years, after completion of Year 7. In order to attend such courses, pupils must take a special entrance examination. In the first year (Year 8), courses provide intensive tuition in a foreign language, the same number of teaching hours being devoted to this subject as in the *gimnázii* that specialize in languages.

Those completing these six-year courses receive a certificate of completion of middle education (*srédno obrazovánie*), which grants access to higher education, and a Level 3 vocational qualification, provided that they pass final examinations in occupational theory and practice. This opens up the prospect of finding better-paid work. Originally these courses were intended to prepare students for work requiring a high level of occupational and management skills. As mentioned in Section 2.2 from p. 62), most students do not in fact complete the course, but go straight to university once they have completed middle education (*srédno obrazovánie*) at the end of Year 12. Observers of education in Bulgaria interpret this as a sign that the vocational training element of state school education is of poor quality and is more particularly not matched to the labour market.

In the school year 2003/2004, a total of 158 500 (or 77 per cent of all students on vocational courses at ISCED Level 3) were being taught on five and six-year courses leading to Level 3 vocational qualifications. The most common subjects were technical studies, with 38 per cent of students, business, with 19 per cent, production and processing, with 15 per cent, and services and construction, with 7 per cent. (Figures for more recent years have changed only very slightly.)

Vocational education at Art schools. There is one more group of vocational courses at ISCED Level 3A, which is offered at Art schools (*učilišta po izkústvata*). These courses last four years and usually begin at the age of 15 years on completion of eight-year basic education. In this case too, there is an entrance examination. On completion of the course, students receive a certificate of middle education (*srédno obrazovánie*) and a Level 3 vocational qualification. In the school year 2003/2004, 3700 students (2 per cent of all students on vocational courses at ISCED Level 3) were enrolled in 19 Art schools. (The number of Art schools in 2005/2006 was 20, with 3640 students.)

Figure 2.1 ³⁵

New syllabuses at Vocational schools and Vocational *gimnázii* since 2004.

Under the Vocational Education and Training Act, new courses and syllabuses were introduced in Vocational schools (*profesionálni učilišta*) and Vocational *gimnázii* (*profesionálni gimnázii*) at the start of the school year 2004/2005. The aim was to match the teaching to the new official list of occupations drawn up by the National Agency for Vocational Education and Training (*Nacionálna agéncia po profesionalno obrazovanie*, NAPOO)³⁶ under the aegis of the Ministry of Education and Science. The list was prepared in full compliance with the Eurostat Manual “Fields of Education and Training” (Andersson and Olsson 1999).³⁷ It contains 15 broad fields, 38 narrow fields and 198 detailed occupational fields or individual job titles.

³⁵ Data from NSI *Obrazovanie 2006*, p. 68, and NSI *Obrazovanie 2005* (CD).

³⁶ See p. 168.

³⁷ See Footnote 26, p. 76.

Regardless of the occupation which the young people are studying, the syllabus will cover economics, management and business correspondence. There is also provision for instruction in the software usually used in the occupation in question, and intensive foreign language teaching. Courses are quite broad in the first two years, and the emphasis then shifts to job-specific training. How the new syllabuses are actually applied in practice is another matter, however, given the wide range of problems of implementation in Bulgarian education.

Problems. Regardless of positive changes such as the updating of syllabuses, vocational training at ISCED Level 3 is structurally ineffective since the training is not sufficiently guided by labour market demand. This applies both to the regional and the national labour market. Since there are, so far, no statistics on the real demand for employees who have attended Vocational *gimnázija* by region, structural ineffectiveness at regional level cannot be backed by figures. However, National Statistics Institute (NSI) data from a study of employment at *national* level do shed some light on the issue. According to this, for every 100 people in employment with ISCED Level 3A vocational training in “humanities and the arts”, there are 15.3 who are unemployed, for every 100 who studied “services” there are 14.9 who are unemployed, and for every 100 who studied “agriculture” there are 14.7 who are unemployed (see Appendix Table 7). A 2004 study shows that over half of the working population with vocational middle education were not working in the field for which they had trained at school.³⁸ This demonstrates that the vocational training given as part of middle education is insufficiently matched to actual labour market demand and that reform is urgently required.

It is also obvious that some of those with middle education and a parallel Level 2 or Level 3 vocational qualification who are unemployed would have better chances of finding a job after market-oriented retraining. The shortcomings in the state education system could be remedied in this way in the short to medium term by third-party providers in the area of adult education until reform of the formal education system finally takes hold.

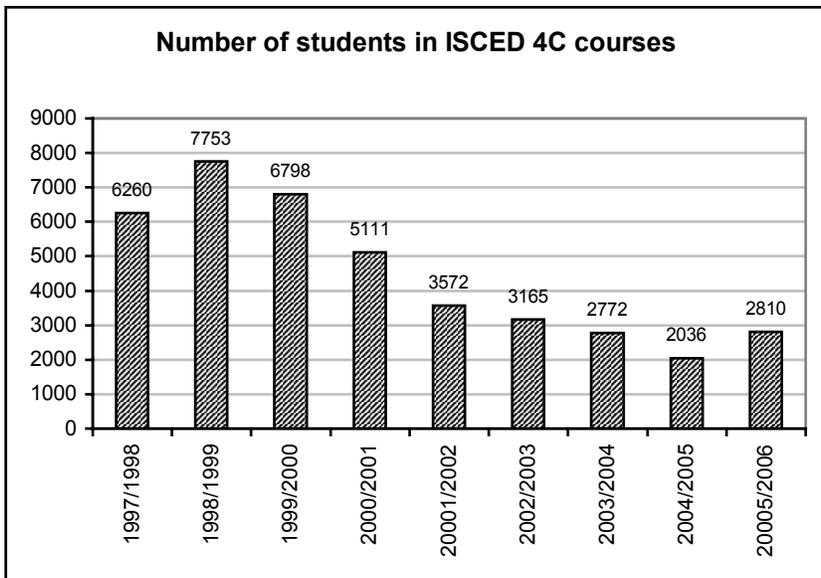
³⁸ Alpha Research: *Obrazovanie vs. pazar na truda*.
Published on 18.8.04 (www.aresearch.com)

2.4.5 Vocational Training after Completion of Middle Education

- ISCED Level 4C
- post-secondary non tertiary vocational training
- *profesionálne obučenie sled srédno obrazovanie*
- Berufsausbildung nach Abschluss der Mittelbildung

Purely vocational training courses taken after completion of middle education (*srédno obrazovanie*) are equivalent to ISCED Level 4C. These courses last two years. They are governed by the Vocational Education and Training Act³⁹. The theoretical age of admission is 19 years, but the typical age of entry is higher since they mostly attract school-leavers who have failed university entrance examinations once or twice. These courses lead to Level 4 vocational qualifications.

Figure 2.2



³⁹ *Zakón za profesionálnoto obrazovanie i obučenie (ZPOO).*

General education is not a purpose of these courses. Rather, completion of middle education (*srédno obrazovanie*) is a condition of admission. The courses are defined as “Acquisition of skills for complex activities under changing conditions, acceptance of responsibility for the work of others and allocation of resources”. That means, their aim is to prepare students for the labour market at a highly skilled level. The courses are provided at Vocational colleges (*profesionálni koléži*) and some of the Vocational *gimnázii* (*profesionálni gimnázii*).

In the school year 2003/2004 the number of students in such courses (in Vocational colleges and Vocational *gimnázii* at ISCED Level 4C) was around 2770 (or 1.3 per cent of all students on vocational courses at ISCED Levels 2, 3 and 4). The most popular subjects were commercial studies (38 per cent), security (36 per cent), art and design (7 per cent), agriculture (5 per cent) and technical studies (4.8 per cent). The number of students in Level 4C courses in recent years has fallen considerably since the 1990s, as shown in Figure 2.2.

2.4.6 Higher Education

- ISCED Levels 5A, 5B, 6
- Tertiary education
- *vísše obrazovanie*
- Hochschulbildung

Bulgaria currently has numerous higher education institutions (*vísši učilišta*).⁴⁰ Many of them are designated “universities”, however without –as the term by tradition would implicate– having an “universal” teaching programme. In contrary, most of the so-called universities have a quite tight field of teaching, as mechanical engineering or forestry.

The Higher Education Act⁴¹ provides for three types of higher education institution: • “universities” (*universitěti*), • “specialist institutes of higher education”

⁴⁰ For a complete list of higher education institutions, as accredited by August 2006, see Table 10 in the Appendix.

⁴¹ Higher Education Act, version of 10 August 2004..

(*specializirani visši učilišta*) and • “colleges of vocational higher education”⁴² (*koléži*, or more explicitly, *samostojátni koléži*, meaning “autonomous colleges [of vocational higher education]”).

Universities must, according to the Act, offer a wide range of subject areas, from at least three of the four areas of humanities, natural sciences, social sciences and technology. A number of other criteria are also laid down. For example, a university must be able to conduct research and to publish the results, must have a library, and so on, and there are also staffing requirements. The degrees awarded by universities are Bachelor’s (*bakalávăr*), Master’s (*magístăr*) and doctorate (*dóktor*). The Act lays down minimum durations for the relevant courses of study: four years for the Bachelor’s, five years for the Master’s (the first four of which may be devoted to a Bachelor’s degree) and a further three years for a doctorate.

The breadth of subject provision at a “university” may be restricted if the “university” indicates this in its name. It is therefore possible for some higher education institutions with a narrow range of subject provision to call themselves universities, such as the University of Forestry or the University of Mining.

The Act also provides for independent **specialist institutes of higher education** (*specializirani visši učilišta*). Under the terms of the Act these focus on either science or the arts. Their provision is intended to cover “one of the fundamental areas of science, the arts, sport or the armed forces”. In effect this section of the Act serves to integrate the advanced training institutions for the arts, sport and the armed forces into the higher education system. They are not obliged to offer Bachelor’s, Master’s or doctoral courses, although most of the other requirements placed on universities also apply to them.

Under the Act, the role of the **(autonomous) colleges of vocational higher education**⁴³ (*samostojátni koléži*) is to provide a vocational training type of higher education leading to the title of “specialist in...” (*specialíst po...*). Unlike the universities and specialist institutes of higher education, they do not need to have any research capacity. Like them, however, they are expected to foster interna-

⁴² In Bulgarian, the term coined by the Act is “*Visše obrazovanie za pridobivane na obrazovatelna i kvalifikacionna stépen ‘specialíst’*” (translated: Higher education for achieving the “specialist” level of education and qualification).

⁴³ In German they could be compared to *Fachhochschulen*, approximatively.

tional contacts in their teaching. Fifty per cent of the teaching is to be given by holders of advanced doctorates, while this figure is 70 per cent in the case of universities and specialist institutes of higher education.

Colleges of vocational higher education inside universities: One paragraph of the Higher Education Act (s. 17 para. 7) also allows universities and specialist institutes of higher education to offer their own advanced vocational courses (*koléži*) internally. The provisions governing the autonomous colleges of vocational higher education apply equally to these. In practice, this means that the universities and specialist institutes of higher education, which generally only offer courses leading to Bachelor's, Master's and doctoral degrees, may also provide courses leading to the title "specialist". Such courses last three years. Holders of the title "specialist" are entitled to transfer to a Bachelor's course.

Difference of *koléži* and *profesionálni koléži*: Colleges of vocational higher education (*koléži*) must not be confused with Vocational colleges, which are officially called *profesionálni koléži*, but are generally known simply as *koléži*. The Vocational colleges (*profesionálni koléži*) offer two-year courses that do not count as higher education. However, admission to a Vocational college is dependent on completion of middle education (*srédno obrazovanie*), which currently also grants access to higher education.

Number of higher education establishments. Currently (figures for academic year 2005/2006) there are 43 universities (*universitěti*)⁴⁴ and specialist institutes of higher education (*specializirani vísši učilišta*) and 10 autonomous colleges of vocational higher education (*koléži, samostojátni koléži*). Additionally, there are 40 colleges (*koléži*) attached to universities or specialist institutes of higher education. Thus, the number of individual higher education institutions is 53. The numbers comprise the private institutions as well: seven universities and specialist institutes of higher education and nine autonomous colleges of vocational higher education (theses figures for 2005/2006). – For 2006/2007 only 51 institutions had an accreditation of the Ministry of Education, the number of private institutions having been reduced from 16 to 14.⁴⁵

⁴⁴ To be precise, higher education institutions which bear the title "university" in their name.

⁴⁵ For a complete list of them see Appendix p. 316.

The right to provide preparation for **doctorates** is enjoyed –in addition to the universities– by a number of institutes of the Bulgarian Academy of Sciences (BAN, *Bălgarska akadēmija na naukite*), the National Centre for Agricultural Science (*Nacionálen céntăr za agrárni nauki*), the Centre for Hygiene, Medical Ecology and Nutrition (*Nacionálen céntăr za xigiéna, medicínska ekológija i xránene*), the Centre for Haematology and Transfusion Studies (*Centăr za xematológija i transfusiológija*), the Academy of Military Medicine (*Voénno-medicínska akadémija*) and the National Office of Veterinary Medicine (*Nacionálna veterinárno-medicínska slúžba*).

Types of higher education course. The courses offered in Bulgarian higher education institutions can be divided as follows, according to ISCED:

- Courses at ISCED Level 5B⁴⁶ lasting at least three years which are taught at colleges of vocational higher education (*koléži*, either autonomous or attached to universities or specialist institutes of higher education, see above) and lead to the **qualification of “specialist”** (*specialist*). In the academic year 2003/2004 around 16 300 students were enrolled on these courses, or 7 per cent of all students in higher education. In 2004/2005 their number was around 18 400.
- Courses at ISCED Level 5A⁴⁷ lasting at least four years which are taught at universities or specialist institutes of higher education. These courses lead to a higher education **Bachelor’s degree** (*bakalávăr*). The number of students on these courses at the last count was 154 900 (or 68 per cent of all students in higher education).
- Courses at ISCED Level 5A lasting at least one year which are taught at universities or specialist institutes of higher education. These courses are intended for students who have already acquired a Bachelor’s degree (*bakalavárska stépen*) and they lead to a **Master’s degree** (*magístárska stépen*). The number of students on these courses at the last count was 25 700 (or 11 per cent of all students in higher education).

⁴⁶ ISCED 5B means higher education courses teaching theoretical knowledge but focusing overall on practical application and the labour market (see ISCED 97 Manual p. 29).

⁴⁷ ISCED 5A means, in brief, a full academic course lasting at least three years that teaches theory and opens the way to further stages of an academic career (see ISCED 97 Manual p. 29)

- Courses at ISCED Level 5A lasting at least five years which are taught at universities or specialist institutes of higher education. These courses lead **directly** (i.e. without a preliminary Bachelor's examination) to a higher education **Master's degree** (*magistarska stépen*). The number of students on these courses at the last count was around 26 700 (or 12 per cent of all students in higher education).
- Courses at ISCED Level 6⁴⁸ lasting at least three years which are taught at universities, specialist institutes of higher education and some research institutes such as the Bulgarian Academy of Sciences.⁴⁹ These courses lead to a **doctorate** (*dóktorska stépen*). The number of students on these courses at the last count was 4834 (or 2 per cent of all students in higher education). In 2004/2005 their number was 5079.

One peculiarity of Bulgarian higher education is its **high degree of specialization**. There are currently nearly 290 courses on the market leading to Bachelor's and Master's degrees (*bakalávăr* and *magistăr*). Under the Higher Education Act, every course has to be accredited by the authority established for that purpose (*Nacionálna agéncija za ocenjávane i akreditácija*, NAOA).⁵⁰

Autonomy vs. Government control. The Higher Education Act grants the Government the following areas of responsibility in respect of higher education:

- It lays down the broad outline of higher education policy.
- It draws up the system for the classification of higher education and occupations (see above p. 76).
- It lays down national standards for admission to higher education by level of education and skills and by subject in the case of regulated occupations.
- It establishes the numbers of students and post-graduates to be admitted each year by occupational field and stage of education and training.

⁴⁸ ISCED 6 means courses leading to an advanced academic qualification, generally a doctorate. As part of the course of study it is necessary to write an original academic dissertation (see ISCED 97 Manual p. 39).

⁴⁹ Other such institutes are mentioned on p. **Fehler! Textmarke nicht definiert.**

⁵⁰ For its own description of its work see www.naea.government.bg.

In his report on the condition of higher education in Bulgaria, Bahram Bekhradnia comes to a twofold conclusion: on the one hand that higher education institutions in Bulgaria are given more freedom than in many European countries, but on the other, that the state has control over a whole range of detailed matters, with the result that universities are prevented from adjusting to changing market conditions. Furthermore, freedom of research and teaching is of little use if conditions are so poor that no advantage can be taken of these freedoms. The report recommends that the Government should leave higher education institutions greater freedom, and should structure the bodies managing higher education institutions in such a way that competence rather than loyalty becomes the criterion for the selection of senior management staff.⁵¹

Admission to higher education. At present, pupils completing middle education (*srédno obrazovanie*) receive a certificate which grants them admission to higher education and can therefore be regarded as a matriculation certificate. However, there are plans to introduce an additional centralised state matriculation examination (a centralized upper secondary leaving examination), under the name *matúra* or *dáržaven zrélostén ízpit* which will become compulsory for admission to higher education. The introduction of the *matúra* has been foreseen several years running now (on details see p. 64) and last news (in summer 2006) was that the next attempt to perform the reform would start in 2008.⁵² If, finally, on day the *matúra* is introduced as planned, pupils who either do not take or do not pass this examination will only receive a certificate of completion of middle education (*srédno obrazovanie*), which will certify that they have successfully completed Year 12 but will not entitle them to continue their education at an institution of higher education. The certificate of completion of middle education will then only be of use in finding a job which demands completion of middle education (Year 12). This currently is true for various branches of the civil service.

Number of students. The overall number of students in ISCED 5 and 6 in Bulgaria was 228 000 in 2003/2004 and 243 000 in 2005/2006. In 2005, about 40 200 students took an higher education degree of any kind (2935 *spécialisti*, 36 740 Bachelors and Masters and 523 Doctors).⁵³ Conflicting opinions are ex-

⁵¹ Bekhradnia 2004. For further detail see p. 111.

⁵² In more detail see p. 64.

⁵³ NSI: *Obrazovanie* 2006, p. 92.

pressed as to whether the country has too many or too few students. One way of measuring this might be to make as broad as possible an international comparison of the proportion of students in the population. One usual indicator of such matters measures the proportion of students in the age range 20 to 29 years within that entire age group. In the case of Bulgaria, the results are as follows: while an EU25 average of 28.3 per cent of young people in that age bracket were studying in higher education in 2004, the proportion was only 20.0 per cent in Bulgaria.⁵⁴ (For further comparison: The corresponding figures for the UK were 30.1 per cent, for Germany 24.3 per cent.) The relative number of students in Bulgaria is thus appreciably lower than the EU average, and it even sunk by 1.5 percentage points from 2001, whilst EU25 figures rose by nearly 3 percentage points. If it is not to lag behind other EU countries, Bulgaria must therefore rethink its higher education policy.

Preferred fields of education. Among students studying for a Bachelor's or Master's degree, there are strikingly high proportions in the fields of economics and administration (24.0 per cent in 2004/2005), engineering (16.5 per cent), social sciences (12.5) and law (5.3), and low proportions in manufacturing and processing (1.9 per cent), architecture and construction (2.6 per cent) and personal services (2.9 per cent).⁵⁵

Students holding several degrees. Some reservation is in order about the quality of the skills attested by these educational attainments. It seems not to be unusual in Bulgaria to take two different degrees in higher education (*vísši obrazovánija*), especially for women. The significance of this must not be confused with what simultaneous enrolment in two different degree courses might mean in Germany or the UK, for example, which very few students undertake. Not even to mention university graduates claiming "two degrees" when they actually have a bachelor's and a master's. Moreover, in recent years there has been a huge problem of granting university degrees in exchange for bribes – a problem which is clearly based on the poor regular salary of the teaching staff.

⁵⁴ All figures here are calculated by sum of enrolments in ISCED Level 5 (standard higher education) and ISCED Level 6 (doctorate). - We used most recent data available from the Eurostat data base, in January 2007.

⁵⁵ See Appendix Table 9 on p. 313

Reliability of statistics on degrees. In every case, statistical indicators (as given in more detail below in Section 6.2 on the level of education, especially from p. 258) look at formal criteria – the completion of stages of the education system – rather than at the contents or the attained skills. As in all states of the former Eastern Bloc, school and university teaching in Bulgaria have been consisting of learning by heart and reproducing to a large extent. Even now it is not unusual that students learn a complete essay at heart, without really understanding it, in order to write it down during the exam. Critical thought and discussion have been a rarity, and there has taken place little change in this area yet. Teachers from Western Europe who travel to Eastern countries to teach languages know all about this: languages students have generally never encountered teaching methods such as open discussion in their educational careers, although here too, there are exceptions. And education is beginning to change, if only as one generation of teachers gives way to the next. Such “natural” modernization can also be seen in university teaching: modern paradigms are recently spreading, such as deconstruction of the concept of the nation-state, which previously had hardly been questioned.

2.5 Funding of Education

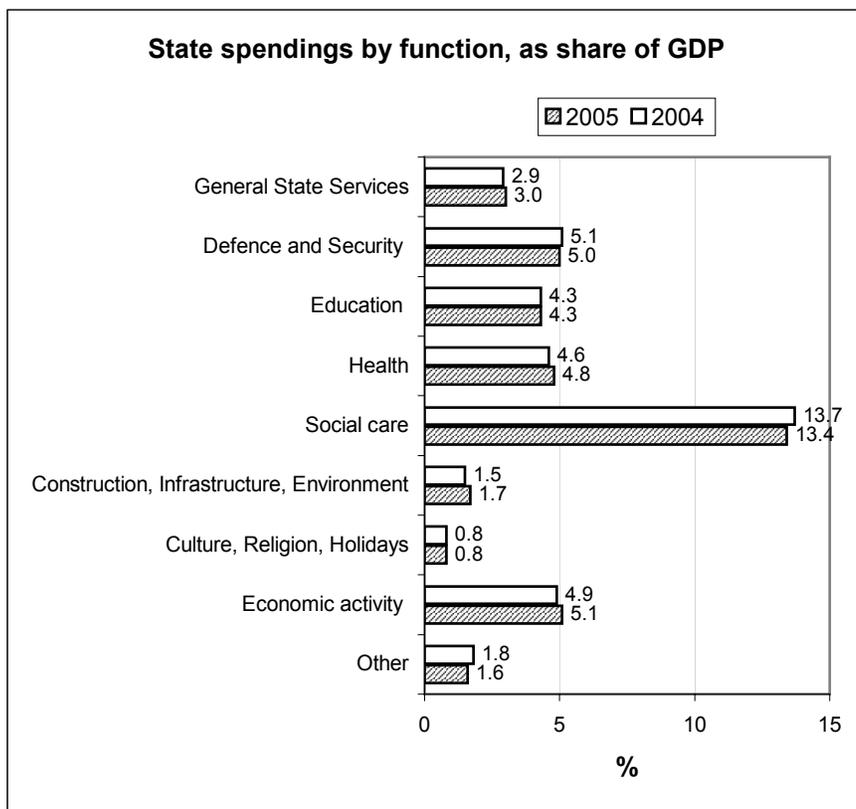
The main sources of funding for the formal education system are central government, the local authorities, foreign institutions and organizations, and income from fees. Central government accounts for the largest share. According to data from the National Statistics Institute, state spending on education in 2006 amounted to around 1.9 billion leva (some 974 euros).⁵⁶ This accounted for about 10.5 per cent of general budget spending, which is, *nota bene*, a downwards drift, since 2002 it was 11 per cent, and 2005 11,9 per cent.

Minor contributions come from various international organisations. In 2002, for example, 8 million leva (about 4.1 million euros) were transferred from international organizations. Income from fees was estimated at 200 million leva (about 103 million euros).

⁵⁶ NSI: Statističeski godišnik 2003, p. 215.

With an annual budget spending of 10-11 per cent on education, Bulgarian meets a European average. EU25 figures were 11.03 per cent for 2003. Similar figures have, for example France, Hungary and Austria. Under 10 per cent have the Czech Republic, Greece, Italy, Luxembourg and Germany. Over 15 per cent have Denmark, Estonia, Cyprus and Norway. The UK has 12.83.⁵⁷ – The Bulgarian government budget for 2007 plans to spend 10.5 per cent on education.

Figure 2.3



⁵⁷ More recent data were not available from Eurostat in January 2007.

Education spending as a proportion of GDP: Although there is much talk in Bulgaria of the value traditionally attached to education and the –formerly?– high quality of places of education, the state has in recent years made an appreciably low commitment. This becomes apparent if relative spending on education is measured as a proportion of Gross Domestic Product. The average spending in EU25 countries was 5.8 per cent in 2003, of this 5.2 percentage points by public funding, and 0.6 by private funding.⁵⁸ Bulgarian figures are 4.9 (4.2 + 0.7) per cent. Comparison with other European countries makes the discrepancy even clearer: Denmark 8.6 (8.3 + 0.3), Sweden 7.7 (7.5 + 0.2), France 6.5 (5.9 + 0.6), Finland 6.6 (6.5 + 0.1), UK 6.4 (5.4 + 1.0), and Germany 5.6 (4.7 + 0.7).⁵⁹ According to the budget reports of the Bulgarian Ministry of Finance, education spendings as a proportion of GDP in 2004 and 2005 were even only 4.3 per cent. This seems quite contradictory to official pronouncements that education is one of the political priorities. In the 2005 budget report, government explained that sinking percentage with the current reduction of the number of schools and with “more effective use” of the money.⁶⁰

Spending on the education of adults: The formal education system is funded according to rules that do not take into account the age of the learners. Hence the level of funding made available for the education of adults in the formal education system is proportionate to their number. A considerable contribution to adult education, however, is made by training or retraining programmes for unemployed. In recent years, every year participate about 30 000 to 40 000 learners in the various programmes organised or financed by the Employment Agency. The bulk of the new CPOs (licensed Centres for Vocation Education, see p. 185) has been established to participate in this section of the education market.

Problems of funding: In principle, the Ministry of Education and Science was used to manage the funding of state schools centrally (and the vocational training that takes place in them). In doing so, it has been using a table based on cost per pupil. According to international experts, this centralized funding system is not

⁵⁸ There were no more recent Eurstat data available in January 2007. – All figures add public and private sources of funding. - See also OECD: Education at a glance, OECD indicators 2003.

⁵⁹ All data from Eurostat database, January 2007.

⁶⁰ Ministry of Finance: Report on the state budget 2005 [Doklad po otčeta za izpālnenieto na dāržavnija budžet na republika Bālgarija za 2005 godina] p. 21.

flexible enough. Such a system does not encourage schools to take the initiative to find their own funds. In some cases it even makes it more difficult for teaching to run normally. For example, a Vocational *gimnázija* which is regularly funded by the Ministry of Education and Science may provide additional adult education courses and earn an income from these. However, it was, so far, not allowed to use this income as it sees fit for its own purposes, such as the repair of the school building or the purchase of teaching materials, computers, etc. Instead, the head teacher has to write a report for the Ministry of Education and Science and to request approval to spend the money in this way, and it is far from certain that the Ministry will agree to the use of the funds. In some cases, the Ministry even cuts the usual government payments to the school by the amount of its own earnings. Logically, this discourages schools from expanding their own sources of funds.

For a long time experts have been calling for decentralization of school finances. A pilot project in this direction was launched a few years ago. According to the Ministry, 660 out of 3000 schools were operating under this system at the beginning of 2005.

The Education Reform Programme for 2006-2015 has now defined several changes concerning the principles of funding the education system (see p. 135 ff.), with much attention to decentralization. Local municipalities and the schools themselves shall get more influence on how they use their budget. State support to the schools shall be tied to the number of pupils. In order to give an impression of how much (or little) is spent on education in Bulgaria, we can cite a plan which was published in December 2006 by the government. According to the plan, schools would get between 800 leva (in big cities) and 960 leva (in mountain villages) per year for each pupil (409 to 491 euros). Schools with a specialist programme (*profilirani učilišta*) would receive 1400 to 1900 leva per pupil. Schools for mentally disabled will get a per-child payment of 3300 leva, schools for visually and hearing impaired about 4200 leva.⁶¹

⁶¹ Mediapool, December 28th, 2006.

2.6 Teachers

Number. In the school year 2004/2005, around 122 000 teachers were employed in the entire Bulgarian education system, including pre-primary education, schools for special needs and higher education (see Table 2.2).⁶²

The number of teachers has been falling several years running, This is primarily a consequence of the steady decline in numbers of pupils in general schools: fewer classes are formed, so that fewer teachers are needed. (For more figures see Appendix Table 5). The average number of students per class in the several stages of formal education has not been changing considerably during recent years. It is still at an average of about 20-23. In higher education the numbers of teachers have vacillated in recent years. These changes have broadly followed changes in student numbers. In the last academic year (2004/2004), there were around 22 500 teachers in higher education institutions, some 13 300 of them full-time.

Age structure: Compared with many other European countries, teachers in Bulgaria are relatively young. One usual indicator is the percentage of teachers in secondary education aged 50 or over. According to a European Commission report, Germany and Italy, of all EU countries, had the highest percentage (over 50 per cent). Bulgaria was below the average with about 25 per cent, Romania had over 30 per cent. Lower than Bulgaria were only Estonia, Cyprus, Poland and Portugal.⁶³

Training: In former times pedagogical training in Bulgaria took place in the pedagogical colleges which used to be independent. Over the past decade, however, they have become integrated into larger universities. Pedagogical degrees are offered both as part of the main specialities, and in specific pedagogical fields. Teacher training lasts from four to five years, depending on the degree and speciality. Of the 41 500 university graduates (both bachelor's and master's) in 2005, 8 per cent were graduates in teacher training.⁶⁴

⁶² The figure includes about 9000 part time teachers in higher education as well.

⁶³ Detailed analysis to the Lisbon progress report (see "Further Reading"), Mai 2006, Chart II.1.

⁶⁴ NSI, Education in Bulgaria, 2006, p. 30.

Table 2.2

Teaching staff by type of educational establishment					
	2001/02	2002/03	2003/04	2004/05	2005/06
Total	126 248	121 672	122 986	122 002	122 339
Pre-primary	18 637	18 276	18 675	18 893	19 254
General education	63 261	61 354	60 338	59 135	58 005
Primary (Years 1-4)	21 223	19 775	19 089	17 459	16 886
Lower secondary (Years 5 to 8, <i>prógimnázija</i>)	28 894	27 720	27 108	26 407	25 647
Upper secondary (Years 9-12/13)	13 144	14 696	14 913	15 269	15 472
Vocational education	18 129	18 809	19 362	19 352	19 064
Vocational schools (VET Level 1)	71	95	100	102	92
Vocational schools and <i>gimnázii</i> (VET Level 2)	2 664	2 872	2 698	2 489	2 352
Vocational <i>gimnázii</i> (VET Level 3)	14 308	14 649	15 381	15 522	15 282
Art schools	914	959	984	1 009	1 070
Post-secondary vocational (<i>koléž</i>)	172	234	199	230	268
Special schools	2 333	2 229	2 079	2 001	2 083
Tertiary education	23 888	21 004	22 532	22 621	23 933
<i>Read lower lines as: "of these full time"</i>	14 949	12 917	13 411	13 308	13 608
By Type of Institution					
In Universities and equivalent institutes	21 546 13 985	18 710 11 992	20 218 12 472	20 145 12 384	21 534 12 679
In Colleges of higher vocational education (<i>profesionálni koléži</i>)	2 342 964	2 294 925	2 314 939	2 476 924	2 399 929
By Academic Position					
professors (<i>profésori</i>)	2 155 1 236	1 933 1 076	2 185 1 119	2 008 1 027	2 313 1 043
associate professors (<i>docénti</i>)	6 661 4 419	6 602 4 293	6 766 4 531	7 101 4 511	7 250 4 636
assistants (<i>asisténti</i>)	11 102 7 845	10 048 6 424	10 078 6 469	10 156 6 547	10 265 6 688
lecturers (<i>prepodaváteli</i>)	3 732	2 370	3 455	3 330	4 072
scientists (<i>naúčni sátrúdnici</i>)	238	51	48	26	33

There are several pedagogical institutes for **continuing qualification** of teachers. They are attached to the larger universities, such as the University of Sofia, the University of Šumen, and the University of Stara Zagora.⁶⁵ These institutes had been founded in the 1950ies as IUUs.⁶⁶ Since 1983 they have undergone subsequent changes concerning their legal status or affiliation. Currently they are called “Departments for information and training of teachers” (*Departament za informacija i usăvăršenstvane na učiteli*), offering courses, libraries, foreign language aids, etc.

The National Pedagogical Centre (*Nacionálen pedagogičeski cėntar*)⁶⁷ is a special institution attached to the Ministry of Education, to organise continuing training for teachers of secondary schools. Its headquarters are in Sofia, and its branches (called Regional Pedagogical Centre – *Regionálen pedagogičeski cėntăr*) in each of the 28 Bulgarian administrative districts. According to the 2006 activity report, courses have been attended by 122 000 participants: 12 000 teachers in courses financed by the Ministry of Education (with a budget of 600 000 leva), 31 400 teachers in courses financed by the municipalities or the teachers own contributions (1 million leva), and 79 000 teachers following the government programme to enhance the computer skills teaching staff, funded by the Ministry of Education with 2,5 million leva. In the report, there is no data on intensity or effectiveness of these courses.

Salaries: The salaries of teachers in the public sector are generally low. Even though teachers have been given above-average pay increases in recent years, their salaries are well below the average for the public sector, as is shown in Figure 2.4. In 2003, the average monthly salary in public education was 296 leva (about 150 euros), the average in the public sector about 330 leva. Salaries have considerable risen by 2006 (see Figure 2.4), but anyway teachers remain being paid relatively bad: An average income in education (public sector) in 2006 was about 380 leva (195 euros), an average salary in the public sector in general was about 430 leva (220 euros).⁶⁸ At present (2007) a teacher at the beginning of his

⁶⁵ Website of the three centres mentioned here are www.diuu.bg (Sofia), www.ittd.acad.bg (Šumen, but physically situated in Varna) and www.uni-sz.bg/dipku/index.html (Stara Zagora). {Websites accessed in April 2007.}

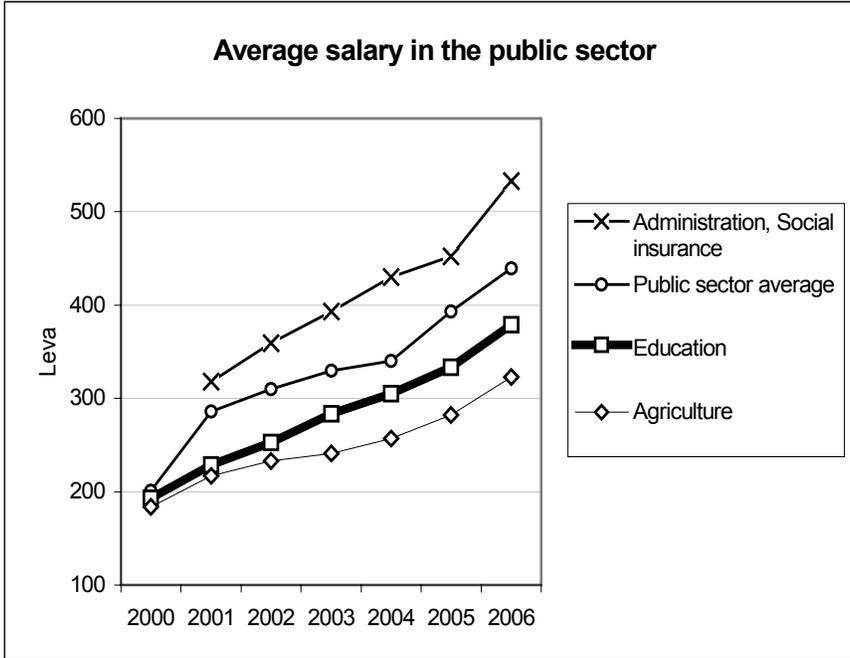
⁶⁶ See p. 44, in Chapter 1.

⁶⁷ www.npc-bg.com

⁶⁸ NSI data from www.nsi.bg/Labour/Empl_Sal06.htm

or her career earns approximately 150 euros, and a teacher with 25 years of teaching experience earns about 200 euros a month.

Figure 2.4



The level of salaries lowers the quality of teaching. Teachers often look for additional sources of income. In many cases, teachers give private lessons, sometimes to their own students. Teachers themselves see this not only as a consequence of their low salaries, but also as an acceptable way to help weaker students. Public opinion outside the education system however often blames teachers of bad service performance.

Salaries of teacher have become a subject of vivid public debate in 2006 and 2007, when the government started to implement the 2006-2015 education reform programme. According to the programme, salaries of teachers shall vary depending on a range of factors. This is called “differentiated salary” (*diferencirana zapláta*). When this book went to print in April 2007, the issue was not settled yet. There were attempts to agree with the teachers’ organisations a

list of seven criteria as success of the students, use of information technology in the classroom, the students' own opinion on the teacher, success of students in competitions (like maths or literature competitions), the overall performance of the school, the opinion of the school council consisting of teachers, parents, etc. An important topic was whether the director of the school would have a right to veto. Although there had been plans to link the salaries to performance already in 2007, it seemed quite unlikely that this reform really would take place that quickly. Last news in March 2007 was, that in April 2007 the system should be tested in 15 schools.⁶⁹

Number of pupils per class. An important factor for the quality of teaching a teacher can deliver, is the size of the classes. Generally speaking, classes in the Bulgarian formal education system (up to secondary education) have an average number of pupils of 22 (see Table 2.3).

Table 2.3

Average number of students per class ⁷⁰						
	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Primary education	20.1	19.9	20.2	20.1	19.9	19.8
Lower secondary general	21.8	21.6	22.3	21.9	21.6	21.2
Lower secondary vocational	21.5	21.6	22.3	21.1	20.4	18.8
Upper secondary general	23.5	23.4	23.4	23.6	23.6	23.4
Upper secondary vocational	22.8	22.8	22.7	22.4	22.4	22.3
Post-secondary vocational	20.4	20.1	20.0	21.8	24.3	21.1

Some European figures for comparison are as follows: Average size of classes in ISCED 1 and 2 in Switzerland is 19.2 and 18.7, in Germany 22.1 and 24.7, in Italy 18.4 and 20.9, in Romania 18.6 and 21.0, in the UK 24.3 and 21.0 (in 2004).

⁶⁹ Press release of the Ministry of Education, March 26, 2007.

⁷⁰ NSI *Obrazovanie* 2005 (CD), Table A.VI.4, and NSI *Obrazovanie* 2006 (print) p. 104.

This shows that Bulgaria, at least in Primary and Lower secondary education meets an European average. However, there has been criticism in recent years that Bulgaria has too many teachers. The students-to-teachers-ratio for ISCED 1 and ISCED 2 in Bulgaria is 13,5 and 16,8, in Germany 16,1 and 18,8, in Romania 15,7 and 17,8, in the UK 16,7 and 21,1, in France 14,3 and 19,4, but in Sweden 12,5 and 12,1 and in Greece even 9,5 and 11,3 (all figures for 2004).⁷¹

2.7 School Enrolment and Non-compliance with Compulsory Attendance

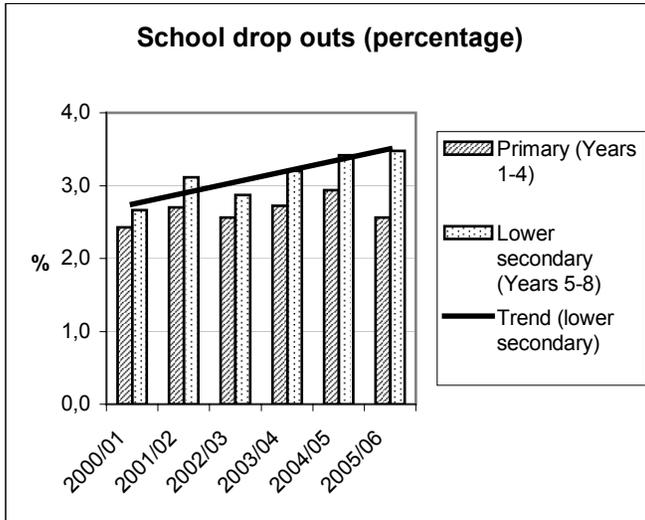
At present, a significant problem in the Bulgarian education is the low enrolment rate or, especially the high **drop out**. There is a certain amount of children who stop going to school. From data supplied by schools for the school year 2004/2005, the National Statistics Institute recorded over 7400 cases of “school drop-out” in primary education (Years 1-4), accounting for 2.6 per cent of all primary pupils in the first four years of school attendance (290 000). Drop outs in lower secondary education (Years 5-8) are even higher: Over 10 000 of 312 500 students in 2004/2005, or 3.5 per cent. As can be seen from Figure 2.5, this number has even been rising during recent years. In 2000/2001 it was only 2.4 per cent for primary education and 2.7 per cent for secondary.⁷²

As reasons for school drop outs, Bulgarian official statistics use three categories. Accordingly, of the 7400 primary school drop-outs in 2003/2004, about 1200 are due to emigration (and thus are not relevant for a discussion of problems with school attendance), 3680 to “family reasons” and about 1685 to “lack of willingness” which one might translate as “children not wanting to learn or parents insufficiently aware of the need to send their children to school”. There is no statistical data on ethnic allegiance, but it is clear that most of such cases belong to the Roma minority. Insider also know that there are children of between seven and ten years of age, mainly from Roma population, who have never even started school (and thus do not appear in drop-out statistics). Many others have dropped out after a short time. Such children have the worst chances in the labour market later on.

⁷¹ Data from Eurostat.

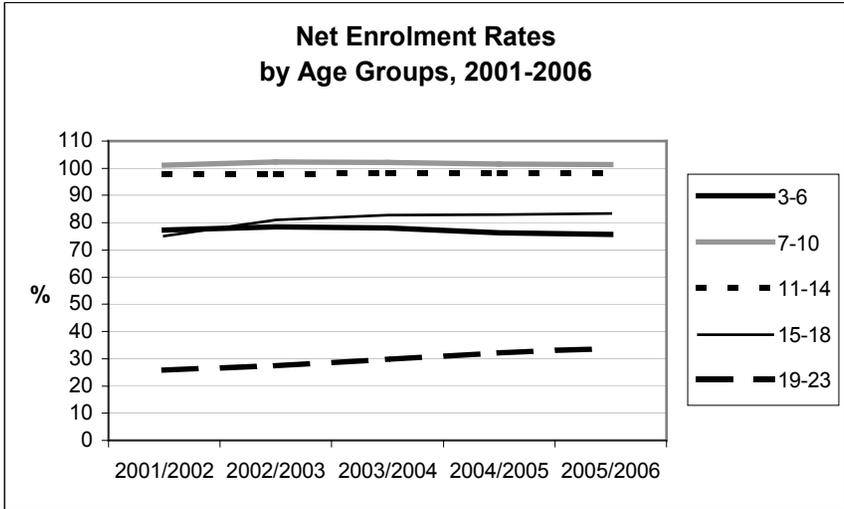
⁷² NSI: *Obrazovanie* 2006, p. 101-102.

Figure 2.5



Another problem is **enrolment among 15 to 19-year-olds**, which is relatively low by European standards. While school enrolment among children aged 5 to 14 years in Bulgaria, 98.2 per cent (2003), differs little from the EU average (99.2 per cent in 2001), there is a considerable difference between Bulgaria and most EU states in respect of the age group 15 to 19 years. While the EU average for school enrolment among 15 to 19-year-olds was 81.4 per cent in 2003, this figure was only 74.2 per cent in Bulgaria (Belgium 91.0 per cent, Germany 89.4, France 86.6 and Austria – see Appendix Table 7). Education experts say, if Bulgaria does not catch up, future generations will be less well educated than their contemporaries in the EU, which will affect their quality of life and economic opportunities. If the country does set itself the goal of drawing closer to the European average, it will have to do more to encourage young people and young adults to take part in upper secondary education (Years 9 to 13) and thereafter in vocational training. Indeed, in recent years there seems to be a positive development. According to the latest NSI report on education, school attendance of those aged 15 to 18 years has risen from 75.2 per cent in 2001/2002 to 83.4 per cent in 2005/2006. School attendance of those aged 19 to 23 years rose from 25.8 per cent in 2001/2002 to 34.0 per cent in 2005/2006.

Figure 2.6



Various **sources of errors** need to be borne in mind in interpreting school enrolment figures. For one thing, data of the Education Ministry suggest that there have recently been thousands of cases of one and the same pupil being enrolled simultaneously in two schools. This generally happens when a pupil transfers from one school to another. In budgetary terms, it is advantageous to keep on the roll children who are no longer attending. Experts suggest that it is common to register children as enrolled even if some attend only occasionally or not at all. Material collected in 2006 for a report at the local level illustrates this phenomenon of absenteeism that is not reflected in official statistics. In Vidin, a town in north-western Bulgaria, there were 502 Roma children enrolled in the official records of the Roma segregated school at the beginning of the 2005/2006 school year.⁷³ At the end of the first school term of the 2005/2006 school year, official data said that 21 Roma children had dropped out. However, when a local NGO (Drom), engaged in education politics, visited the school on 30 March 2006, they found that a total of 126 Roma children entered the segregated school premises to attend classes on that day, representing only a quarter of all enrolled pupils.

⁷³ OSI Roma Education Report 2007, p. 35.

2.8 Quality of Education

Traditionally, education has been given high social priority in Bulgaria ever since the national renaissance movement of the 19th century, and it was further encouraged during the era of socialist party rule. However, the condition of the education system today gives rise to serious criticism, which is expressed forthrightly in the media.

There are two main reasons for bad performance. First, methods of learning and teaching in socialist Bulgaria were generally already outdated and did, for example, little to encourage independent thinking. Secondly, the quality of school education has fallen sharply since the political upheaval of the early 1990s and the subsequent transformation of society. Both, the lack of money and the dismemberment of the old institutions did their best to undermine quality in education. Inflation overhauled teachers' salaries, inservice training for teachers practically faded away and school equipment become obsolete.

In a report on education in Bulgaria published in May 2005, the newspaper "*Kapitál*" reported the following remarks by a pupil: "The teachers give you a pattern, and if you don't keep to it, you fail. They say right out, 'You get into university if you're good at rote learning.' So you stop thinking for yourself at all. But it's not the teachers' fault. They have such low salaries that they can't do anything else. And anyway, you have to bend with the wind. You don't write that Botev⁷⁴ was an atheist, and you don't talk about his left-wing views, because then you get a poor mark."

The newspaper report continues: "A teacher can teach philosophy today without ever having read a single word of Nietzsche. You can get into university today by writing out from memory some incomprehensible essay on the 'lives and quotidian fates, pregnant with misfortunes, of the hero Slavejkov⁷⁵ and the multi-sequenced polytonal emotional layers of such existences'. And these examples are not some fanciful invention. If you are a child in Years 1 to 4, you have to stuff

⁷⁴ Xristo Botev (1849-1876) was a Bulgarian poet of the national revival period . He is honoured as a hero of the revolutionary movement that fought against the Ottoman Empire.

⁷⁵ Penčo Slavejkov (1866-1912) is a major writer in the canon of Bulgarian literature, acknowledged as the "forerunner of symbolism" in Bulgaria. – Learning essays by heart is a widespread way of preparing for examinations among Bulgarian pupils.

yourself with pastries even if you don't like them and will become overweight.⁷⁶ If, on the other hand, you're a Roma child, it is more likely that you will be sent to pick mushrooms while you really ought to be at school."⁷⁷

The comparatively positive picture given by the statistics quoted above, which suggest that Bulgaria concerning quality of education does not come off too badly in comparison with the rest of Europe, is qualified by the findings of other investigations. The TIMSS study,⁷⁸ which observes international trends in mathematics and natural sciences, comes to the conclusion that the knowledge of Year 8 pupils has become far poorer since the change of regime in Bulgaria than in any other of the countries investigated. In mathematics, Bulgaria slipped from 11th position (in a total of 50 countries) in 1995 to 25th in 2003. In sciences, Bulgaria fell from place 5 to place 24. A similar landslide in school education outcomes is being recognized in studies on literacy⁷⁹, civic education and the capability to solve problems.⁸⁰

A further problem is that although reforms may be announced, and programmes, statements of intent and "national strategies" may be published, implementation is quite another matter, regularly failing for one reason or another. It was therefore no surprise that the introduction of a centralized upper secondary matriculation examination (*matúra*) once again has been postponed in 2006. Accordingly to the revised Education Act, the *matúra* was to be implemented from the school year 2005/2006, aiming to provide for the first time a standardized examination for those leaving middle education who wish to go on to higher education. For several reasons, the Ministry of Education did not put this into practice. Last news in 2007 was, that it would start from 2008...

Another obvious example of the collapse of proposed reforms was the fate of a major reform programme for the entire Bulgarian education system, to be imple-

⁷⁶ Reference to a national programme of school meals for primary school pupils, which was criticised for its standardized food.

⁷⁷ Picking and selling mushrooms is a common way of earning a living among Roma

⁷⁸ Trends in International Mathematics and Science, <http://timss.bc.edu>.

⁷⁹ I.V.S. Mullis et al.: PIRLS 2001 International Report: IEA's Study of Reading Literacy Achievement in Primary Schools. Chestnut Hill 2003. –

⁸⁰ Human Resource Development Operative Programme (2007), p. 30, referring to PISA 2003, see www.oecd.org. 2003 Assessment Framework: Mathematics, Reading, Science and Problem Solving Knowledge and Skills, Publications 2003.

mented from 2001 with World Bank funding, but abandoned in 2003 because of failures all along the line.⁸¹

A certain development is visible, however, concerning the computerization of the school system. The relevant strategy paper for the introduction of communications technology in Bulgarian schools provides for all schools in the country to be equipped with computers in the years 2005 to 2007, so that one machine is available for every 12 pupils and the schools are connected to the Internet via their own “education network”, through which controlled contents can be called up. The costs of this programme are put at 140 million leva (about 70 million euros) in the strategy paper. According to a recent government report,⁸² by 2006 there were about 50 000 computers available in Bulgarian Middle schools, or an average of 16 computers in each school. Government figures for June 2006 say that there was, as an average, one computer for 19 students, and the aim was to reach 1:10 or at least 1:12 by end 2007. A national education server, as a centralized school education platform, has started to work as well.⁸³

2.9 Some Notes Concerning Higher Education

Bulgaria has already made huge changes in higher education since 1989, and others are under way. These coincide with a period in which EU states themselves are carrying out far-reaching reforms of this sector of education. In 2004, an analysis of Bulgarian higher education was presented by the Higher Education Policy Institute (HEPI)⁸⁴ in Oxford.⁸⁵ This study looked at the Bulgarian higher education system in the European context. Its main findings will be summarized below. (The report makes clear that the author adheres to a market view of the purpose of higher education, namely that higher education institutions should train for the labour market and should pay less attention to pursuing such matters as humanist ideals.) According to Bahram Bekhradnia, the author of the study, the features of Bulgarian higher education are as follows .

⁸¹ See p. 150.

⁸² Introduction to the Human Resource Development Plan (2007), p. 32.

⁸³ See Footnote 134 on p. 128.

⁸⁴ www.hepi.ac.uk.

⁸⁵ Bahram Bekhradnia: Higher Education in Bulgaria – a Review for the Ministry of Education and Science. Oxford 2004.

Autonomy / control: On the one hand, Bulgarian higher education institutions have an unusual degree of autonomy, but on the other, they are subject to an unusual degree of detailed control. The aim must be to replace centralized control by good market information: what is needed, and how can the institution respond? One problem restricting the flexibility of higher education institutions is that the main decision-making organs generally involve their staff. Decisions are therefore taken not for the benefit of society, but for that of the staff.

Higher education landscape: The main feature of the Bulgarian higher education is that it consists of a high number of very many small institutions independent from each other. Bekhradnia regards this as a waste of resources, and mergers are recommended. (For a complete list of Bulgarian higher education providers see Appendix, Table 10, from p. 316)

Funding: Bulgaria spends 0.6 per cent of its Gross Domestic Product on higher education, less than other countries. The method of funding may already have improved, but an element of competition and a focus on success need to be introduced.

Teachers: The ratio of students to teachers in higher education, 10:1, is astonishingly low. Although this might be seen as a plus elsewhere, Bekhradnia regards it as a minus since it reinforces, as he says, the traditional style of teaching. “The teacher dictates, and the students copy down,” instead of being encouraged to work for themselves.

Transparency: Bekhradnia pursues the idea that the purpose of higher education is to meet the needs of the market. Care should therefore be taken to ensure that students can easily receive the information they need to decide which course is right for the market. Industry should make contact with the universities in order to influence courses and teaching methods. The Higher Education Accreditation Agency⁸⁶ should monitor closely the results of the courses that it approves and publish these widely so that students can decide about the quality of institutions.

International compatibility: Bulgaria has brought its higher education system in line with the Bologna system more quickly than other states by introducing the three-stage scheme of Bachelor’s, Master’s and doctoral degrees. However, it

⁸⁶ *Nacionálna agéncija za ocenjávane i akreditirane kám Ministérskija syvét, NAOA.*

has split the number of years required for Bachelor's and Master's degrees 4+1 while most European countries follow the pattern 3+2. Moreover, Bachelor's degrees (*bakalávárska stépen*) are barely recognised by the public, commercial employers or the labour market. Two thirds of graduates with Bachelor's degrees go straight on to complete a Master's.

Special place of the qualification “specialist”: The title “specialist in...” (*specialist po...*), which can be gained at colleges of vocational higher education (*koléž*) and complies with ISCED 5B, has a very particular position. According to Bekhradnia, it does not fit very well the European education system. There is also little demand for “specialists” in the labour market. Many of them simply go on to take a Bachelor's degree. Bekhradnia suggests that courses at colleges of vocational higher education (*koléž*) should be turned into Bachelor's degree courses or should count towards them, as has been done in other countries with such sub-degree courses.⁸⁷ – Bulgarian education experts have a more differentiated view. They argue that some *specialist* graduates find quickly a job, while others indeed have little chances. For example, a *specialist* in economics or in technical vocations seems not to be attractive for the labour market, but pre-school teachers and hospital nurses are.

Lifelong learning: Higher education institutions in Bulgaria still very largely adhere to the old “elitist” concept of tertiary education. In general terms, they offer full-time courses for young first-time students. In order to keep pace with the notion of lifelong learning, which has in principle already been accepted by the Bulgarian Government, they should be moving over to a system of mass higher education which allows people to start courses at any stage of their lives, and to flexible study programmes that make it easier to combine employment, family commitments and study.

New Regulations for Higher Education Following EU Standards

In order to adapt Bulgarian Higher Education to EU standards, there have been issued a series of regulations in recent years:

⁸⁷ In March 2007, after demonstrations of college students, there were plans that colleges can issue Bachelor's degrees in the future. See p. 76.

- Regulation of state requirements to basic documents, issued by higher education institutions and the European Diploma Supplement (published in DV Vol. 75, 12-8-2004), aiming at transparency and equal acceptance of qualifications in order to foster international mobility.⁸⁸
- Regulations for the application of a credit point system in higher education (published in DV Vol. 89, 30-9-2004) which introduces the Bulgarian credit point system (ECTS).⁸⁹
- Regulations for the state requirements for organization of distant learning in higher education (published in DV Vol. 99, 2-11-2004).⁹⁰

Additionally, in 2006 there were plans for a standardised credit point system in vocational education and higher education, according to the current attempt of the European Commission to introduce such a system (called ECVET – European Credit System for Vocational Education and Training), in European education, aiming at comparability, transparency and in-turn-acceptance of vocational qualifications and competences.⁹¹

2.10 Roma in the Education System

The integration of the Roma minority is currently considered as one of the most serious problems of the education system in Bulgaria.⁹²

The number of Roma in Bulgaria, was 371 000, according to the last census from March 2001. This is 4.7 per cent of the 7.7 million overall population. However,

⁸⁸ *Naredba za dържавните iziskvanija kăm osnovnite dokumenti, izdavani ot visšite učilišta i săpăststvaštoto gi Evropejsko diplomno prilozhenie.*

⁸⁹ *Narédba za prilăgane na sistéma za natrúpvanie i transfér na kréditi văv vésšite učelišta.*

⁹⁰ *Narédba za dържавните iziskvanija za organizirane na distanciónna fôrma na obučenie văv visšite učilišta.*

⁹¹ Mentioned in the Report on Bulgarian Contribution to European Education Policy, February 2006.

⁹² Much of this chapter relies on the most recent report on education access for Roma children in Bulgaria, published by the Open Society Institute (Budapest) in March 2007. This report is an extraordinarily well done piece of scholarship. It is part of a study concerning Bulgaria, Romania, Hungary and Serbia. Citation: Open Society Institute: Equal Access to Quality Education for Roma. Monitoring Reports, Vol. I. Bulgaria, Hungary, Romania, Serbia. Budapest 2007, especially pp. 11-180. The report is available at www.soros.org (accessed in April 2007).

statistical data on Roma are hardly reliable. Many people who are identified as Roma by the surrounding population do not identify themselves as such, for a variety of reasons, first of all the social stigma associated with belonging to this ethnic group. Thus, the number of Roma probably is much higher. Some experts put it at 600 000 or even 800 000.⁹³ In every case Bulgaria has one of the largest Roma populations in Europe, and there are serious problems in terms of education. The government has adopted policies and programmes aimed at improving the situation of Roma generally, and very many organisations of the civil society sector are working in this field as well. However, indicators still show that Roma children are often denied equal access to education.

Dealing with Segregation

Compared to the Roma communities in the other Eastern European countries, Roma in Bulgaria live in the most segregated residential settings. Today, according to one estimate, 57 per cent of Bulgarian Roma live in “Roma neighbourhoods”, while another 21 per cent live in “neighbourhoods with a predominantly Roma population”.⁹⁴ Another estimate puts the share of Roma living in “principally Roma” neighbourhoods in Bulgaria at 66.4 per cent, and those living in “mixed” neighbourhoods at 31.4 per cent.⁹⁵

“Roma neighbourhoods” are hardly a result of purposeful residential segregation in the past. Rather, it started as a result of traditional life patterns, and became an increasingly visible phenomenon in the course of urbanisation and industrialisation during the 1950s to the 1970s. The communist regime was inclined to eliminate ethnic differences. There were attempts to mix Roma and other population in new housing areas. Such attempts failed mostly because of cultural differences. This can be seen, for example, in the huge *de facto* Roma quarter Stolipinovo in Plovdiv which had been designed as suburbia to integrate Roma into overall

⁹³ See for example: Jean-Pierre Liegeois, *Roma, Gypsies, Travellers*, Strasbourg: Council of Europe Press, 1994, p. 34; E. Marushiakova and V. Popov, *Gypsies (Roma) in Bulgaria*. Frankfurt a. M. 1997, pp. 43-44; Ilona Tomova, *Ciganite v prehodnija period* [Gypsies in transition], Sofia 1995, p. 13.

⁹⁴ Petar-Emil Mitev: *Dinamika na benostta* [Dynamics of pverty]. In: Ivan Szelenyi (ed.): *Bednostta pri postkomunizma*. [Poverty in Post-Communism]. Sofia 2002 (Istok-Zapad), p. 41.

⁹⁵ UNDP: *Avoiding the Dependency Trap: the Roma in Central and Eastern Europe*, Bratislava 2002 pp. 101-102.

population, but over the years has become a clear Roma *ghetto*, when other population left the area.

This kind of *de facto* segregation of Roma housing has automatically led to the establishment of segregated “Roma schools” in neighbourhoods and villages where Roma became the majority. Although parents can choose to send their children to schools outside the area, few Roma parents do so outside an organised desegregation programme.

The communist regime then tried to adapt to the situation and introduced a kind of special education in schools that were attended predominantly by Roma.⁹⁶ Special programmes were adopted in 31 of these schools, stressing vocational training and developing labour skills from the first grade. Officially these schools were called “basic schools with intensified labour education” (*Osnóvno učilište s zasíleno trúdovo obučenje*, OUZTO). Colloquially there were called “Gypsy schools” (*cíganski učilišta*). In addition to education they were assigned production plans. Before their formal transformation into mainstream schools in the 1990/1991 school year, this system included 17 880 students, and the production plan was for about 317 000 leva. Today these schools are ordinary neighbourhood “Roma” schools.⁹⁷

Most experts think that the current *de facto* segregation of Roma and non Roma students is one of the most eminent problems of Bulgarian education today. In 2005 the Ministry of Education identified 90 urban schools and pre-schools where desegregation programme seemed to be favourable. At this time, there were 30 421 children and students enrolled in them, most of them (27 957) primary and secondary school students, the rest enrolled in pre-schools.⁹⁸ However, other reports take it differently. According to the most recent report of the Sofia Section of the Open Society Institute, out of the total 2657 schools of general education and 127 special schools in Bulgaria, the total number of schools with more than 50 per cent Roma students in 2005 was 554, or almost 20 per cent of the total number of schools. There were 960 schools with more than 30 per cent Roma students (35 per cent of the total number of schools). The report says that a

⁹⁶ E. Marushiakova, V. Popov: Gypsies (Roma) in Bulgaria, p. 38.

⁹⁷ OSI Roma education report 2007, p. 43, and Bulgarian Helsinki Committee, 2004 Report on Former OUZTO.

⁹⁸ Josif Nunev 2006, pp. 65-66. (See Bibliography.)

school with more than 30 per cent Roma students tends to be quickly transformed into a “Roma school”, since non-Roma parents tend to withdraw their children from the school.⁹⁹

In many ways, schools with a high level of Roma students are inferior to those with lower numbers of Roma enrolled. Many Roma schools are in poor physical condition and lack the facilities necessary to educate students adequately, even compared to the low overall standards of school equipment in Bulgaria. In the special school networks even the most basic equipment such as desks, textbooks and teaching materials is inadequate or altogether lacking. With such conditions, these schools cannot attract qualified and motivated teachers. Supporters of the desegregation concepts argue that educational results in “Roma schools” are considerably worse than in mainstream schools. According to NGO-conducted research, Roma students in segregated schools perform worse on tests in mathematics and Bulgarian language than do their counterparts in integrated schools.¹⁰⁰

Roma are also overrepresented in the special schools, both in schools for children with intellectual disabilities (“special schools”) and in boarding schools for children with behavioural challenges. The number of Roma children enrolling in special schools continues to increase, as all schools seek ways to keep enrolment numbers up.¹⁰¹

Government Programmes

The Government of Bulgaria has adopted both programmes aimed at improving the situation of Roma that include a section on education, and programmes targeting education that contain measures aimed at minority groups including Roma. However, independent researchers conclude that this has very little evidence of impact or implementation on the local level.¹⁰²

⁹⁹ OSI Roma Education Report Bulgaria 2007, p. 45.

¹⁰⁰ OSI Roma education report 2007, p. 20.

¹⁰¹ OSI Roma Education Report 2007, p. 19.

¹⁰² For a detailed overview on the government programmes concerning Roma education, see the OSI Roma Education Report 2007, p. 51 ff.

The main document that defines Government policies towards Roma is the *Framework Programme for the Equal Integration of Roma in Bulgarian Society*¹⁰³ (hereafter, *Roma Integration Framework Programme*), which was adopted by the Council of Ministers in April 1999. In the education section, the Framework Programme outlines four major problems with Roma education:

- Territorial segregation of Roma schools
- Arbitrary placement of Roma students in special schools for children with intellectual disabilities;
- Lack of mother-tongue instruction
- Low educational status of the adult Roma population.

Therefore, six strategic objectives are enumerated by the programme:

- Desegregation of Roma education
- Termination of arbitrary placement of Roma children in special schools for children with intellectual disabilities
- Combating racism in the classroom
- Introduction of mother-tongue education
- Support of Roma university education
- Adult education.

The Government has issued its own Action Plan for the “Decade of Roma Inclusion 2005-2015”, consisting of several goals and activities, with a timeframe, financing and indicators for implementation.¹⁰⁴ The Decade Action Plan makes education its first priority. Since the adoption of the Plan, the Government has released a number of documents that were supposed to constitute its implementation. However, most recent reports on Roma education conclude that none of these addressed the sphere of education.¹⁰⁵ According to a recent report, the Education Reform Programme adopted in June 2006 (see Section 2.11, from p. 125), even retreats from earlier commitments towards desegregation, by not addressing many of the specific problems identified in the Government’s own Action Plan for the Decade of Roma Inclusion.

¹⁰³ *Rámkova prográma za ravnoprávo integrírane na rómite v bálgarskoto obštestvo*

¹⁰⁴ Available in English at <http://www.romadecade.org/action.htm> (accessed April 6, 2007)

¹⁰⁵ OSI Roma education report 2007, p. 53.

In 2005, the Parliament adopted the *National Programme for Broadening the Participation of Children of Compulsory Age in School*.¹⁰⁶ It envisages ● ensuring free textbooks and school supplies for students from the first to the fourth grade ● reducing the network of schools by closing existing schools in small villages and offering bussing for students up to 16 years of age to “hub” schools, and ● supplying one free meal for all the students from the first to the fourth grade. (The plan has been updated in May 2006.) According to a report by the Ministry of Education from September 2005, by that date the State budget had secured about 8 million Euro to implement that programme, especially to buy 219 school buses to provide transport to “hub” schools. According to a later report of the Ministry, the buses served 13140 students from 134 municipalities and 219 schools, but there was need of at least twice more busses.

Another important policy document on tackling school segregation of Roma is the *Strategy for Educational Integration of Children and Pupils from Ethnic Minorities*, adopted by the Ministry on 11 June 2004.¹⁰⁷ It requires “full integration of the Roma children and students through desegregation of pre-schools and schools in segregated Roma neighbourhoods”. According to the strategy, the Government must provide specially trained teaching assistants in pre-schools and the first grade of primary schools (see below, p. 121). Special mention is made of “providing adult literacy for illiterate or poorly literate adult Roma” as a strategic aim.¹⁰⁸

As for the **implementation** of all the programmes and action plans, independent analysts conclude that on a local level there is very little impact. They see “very loose connection between national documents and policies, on the one hand, and local concrete measures taken by the school staff or local authorities [...] on the other.”¹⁰⁹ As an especially weak point of the governmental programmes is regarded the lack of any elaborated mechanism for monitoring and evaluation. The OSI report concludes: “Since 1999 three governments of Bulgaria have failed to deliver on their commitments to desegregate Roma education.” And “localities, where there are no NGO-led desegregation efforts, have been slow to take action

¹⁰⁶ *Nacionálna prográma za obkhváštane na učenicite v zadážižitelna učilištna vâzrast.*

¹⁰⁷ *Strategija za obrazovatelna integrâcija na decâta i učenicite ot etničeskite malcinstva;* available at www.minedu.government.bg in the legal acts section (accessed April 9, 2007).

¹⁰⁸ Section V.1.9. of the strategy.

¹⁰⁹ OSI Roma Education Report 2007, p. 57.

against segregation.”¹¹⁰ Seemingly, most of the plans have not been implemented, “even as NGO-led desegregation initiatives have been expanding at the local level and could serve as useful models for a more comprehensive Government approach.” The report asks for “a clear vision and concrete instruments for implementation, including appropriate financial resources, is needed, along with specific monitoring instruments to assess longer-term success rates.”¹¹¹

NGO-run desegregation efforts. Soon after the adoption of the *Framework Programme for the Equal Integration of Roma in Bulgarian Society* in 1999 (see above, p. 299), several NGOs started implementing desegregation projects, funded predominantly by foreign programmes such as the Open Society Institute’s Roma Participation Programme¹¹² and later the Roma Education Fund (REF).¹¹³ They enrol children from the Roma neighbourhoods in mainstream schools in the cities of Vidin, Pleven, Montana, Stara Zagora, Sliven, Khaskovo, Sofia and Plovdiv. During the 2004/2005 school year more than 2000 students participated in these programmes. Besides, the projects ensure additional educational support and supervision of the Roma students, and extracurricular activities.¹¹⁴ Other projects deal with transport of children to mainstream schools, support to integrating schools and assisting municipalities to adopt action plans for desegregation. As of October 2006, approximately 15 desegregation projects had been funded by the REF.

Desegregation in special schools. In addition to initiatives aimed at desegregation on an ethnic basis, in September 2003 the Council of Ministers adopted a plan for reducing the number of children in specialised institutions.¹¹⁵ According to the *National Plan for the Integration of Children with Special Educational Needs and/or Chronic Diseases in the National Education System*¹¹⁶ the first goal of the plan is inclusion of children with special educational needs (without regard to the degree of disability) into the educational process in all types of schools and pre-

¹¹⁰ OSI Roma education report 2007, pp. 59-60.

¹¹¹ OSI Roma education report 2007, pp. 19 and 51.

¹¹² For details see www.soros.org

¹¹³ For details see the REF website at www.romaeducationfund.hu.

¹¹⁴ OSI Roma education report 2007, p. 60.

¹¹⁵ Council of Ministers, Decision No. 602 from 2 September 2003.

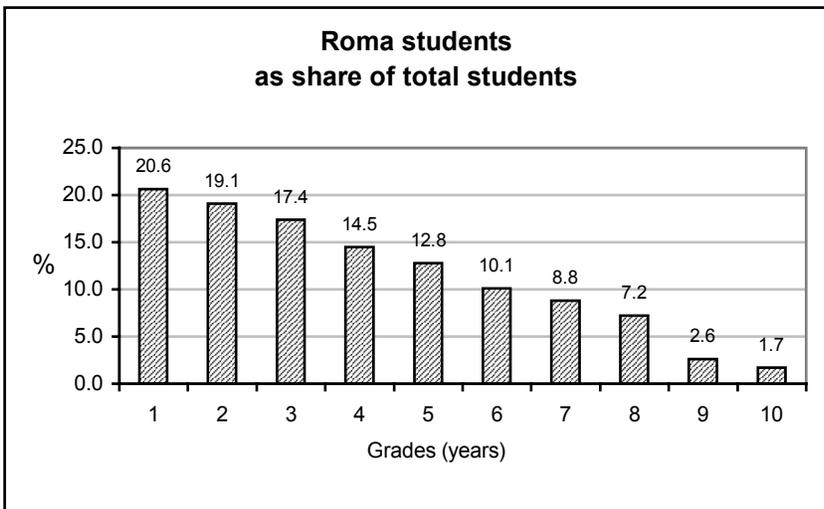
¹¹⁶ *Nacionálen plan za integrirane na decá sás speciálnei obrazovátelni potrebnosti i /ili s khronični zaboljávaniya v sistémata na naródnata prosvéta.*

schools. A 2005 report of the State Agency for Child Protection (DAZD)¹¹⁷ however estimates that this process is slow. The DAZD has criticised the reluctance of the diagnostic teams to direct children from special schools to mainstream schools. In fact, teachers from the special schools are members of the diagnostic teams and thus rather tend to have an interest in keeping the children in those schools.¹¹⁸

School Attendance

A general problem of Roma education is school attendance. While the number of Roma who have never attended school recently declines, Roma are still far more likely to drop out of school, with the proportion of Roma students plunging in higher grades (see Figure 2.7). Moreover, statistics do not reflect the high number of pupils, especially Roma, who are formally enrolled but rarely attend classes.

Figure 2.7¹¹⁹



¹¹⁷ *Džrřavná agćncija za zakrila na detęto*, <http://www.stopech.sacp.government.bg> (accessed in April 2007)

¹¹⁸ OSI Roma education report 2007, p. 61.

¹¹⁹ OSI Roma education report 2007, p. 36, based on a Needs Assessment Study for the Roma Education Fund, December 2004.

Local and international researchers have gathered data demonstrating that Roma also attend pre-school at significantly lower rates than the majority population.¹²⁰ Education experts see pre-school attendance as a more and more important start into formal education. However, Roma children outspokenly seldom are enrolled in kindergartens etc. One significant barrier for Roma families are costs. Many cannot afford the fees set by the municipalities. Rather, the free meals and travel subsidies offered by special schools (for intellectually and otherwise impaired children) may encourage disadvantaged families to enrol their children in such schools. But even if Roma parents decide to enrol their children in pre-school, there are just not enough pre-school places to ensure that every child can enrol.

Teaching assistants

One way to keep Roma children in the classrooms are assistant teachers which can help create a favourable social setting, stay in contact with the families, and answer special needs of Roma children. The need for introducing teaching assistants into the Bulgarian education system was specified in the *Roma Integration Framework Programme*, issued in 1999.¹²¹ Since the 2003/2004 school year about 100 teaching assistants have been appointed in the municipal schools throughout the country to work as classroom facilitators throughout the country. . Experts complain that this is by far below the real needs. Many municipalities do not have the resources to hire such assistants.

More precisely, in the 2005/2006 school year 107 Roma teaching assistants were employed in public schools. About a third of them (28) are appointed by school principals, and municipalities pay their salaries; either on a permanent (28) or a temporary basis (8). Most assistant teachers (71) however work on different projects initiated by non-governmental organisations.¹²² The highest proportion of the teaching assistants are employed within the school desegregation projects. Remarkably high numbers of assistant teachers were in Sofia (15), Lom (10), Sliven (25) and Stara Zagora (11).

¹²⁰ OSI Roma education report 2007, p. 28.

¹²¹ Section V.I, Desegregation of Roma Schools. – For the programme, see also above, p. 118.

¹²² As by March 2006. (Data cited as in the OSI Roma Education Report 2007, p. 63.)

A teaching assistants' job description has been approved by the Ministry of Education in 2003.¹²³ It provides for mainly pedagogical functions. In contrast, teaching assistants of NGO's normally emphasize social functions. Since all basic schools are municipal, salaries of the teaching assistants are paid by the municipalities (which get their budget as transfer from government). Usually, the assistants get the legal minimum wage of about 160 leva (80 euros) at present (2007) which is about the half of the (anyway very low) teacher's salary. It is up to the school director whether to hire a Roma teaching assistant. Every director has only a limited number of positions paid by the municipality, and must choose between hiring a teaching assistant and filling some other position.¹²⁴

Not all activists of Roma desegregation agree with the concept of teaching assistants. Some educational experts, human rights activists and Roma parents have opposed their introduction, arguing that the presence of an Roma assistant would rather hinder than help integration.

Other Problems of Roma and School Education

Romanes as a teaching language. Since the adoption of the National Education Act in 1991, Romanes has been recognised as a mother tongue and can be taught as such in the municipal basic schools. Its teaching, however, has never been organised to reach a significant share of the Roma population, and has declined in recent years. There was a peak of about 4000 Romanes students in basic schools in the mid 1990s, but then it fell again to something between 80 and 150 in 2005/2006.¹²⁵ Currently (2007), there are no schools in Bulgaria where the curriculum is bilingual, and nor are there any schools where the entire curriculum is taught in Romanes. In 2003 a new bachelor's degree programme for primary school pedagogy with Romanes was started in the University of Veliko Tărnovo¹²⁶, aiming to prepare primary school teachers in Romanes. At present

¹²³ For a detailed report on Roma teaching assistants in Bulgaria see www.osi.hu/esp/rei/RTAs_Bulgaria.html (accessed on April 6, 2007).

2007).

¹²⁴ For more detailed description of Roma teaching assistants in basic schools, including several case studies, see the OSI Roma Education Report 2007, from p. 64.

¹²⁵ There are different data. NSI claims 1327 in 2003/2004, 127 in 2004/2005 and 134 in 2005/2006; an insider of the Ministry of Education and Science reported 80 for 2005/2006.

¹²⁶ www.uni-vt.bg. The curriculum is available on the website (accessed on April 6, 2007).

(2007) around 50 students, all of whom but one are Roma themselves, are being educated in the three courses of the programme.¹²⁷

Roma culture in textbooks. Experts in the field find, that most textbooks, especially on literature and history, still present Roma traditions and culture in a stereotypical or even biased way and fail to present Bulgarian national culture as consisting of several ethnic sectors.

Teacher training and support. Many teachers acknowledge that they still have lower expectations for Roma students, despite efforts to improve inter-cultural awareness. This is a reflection of Bulgarian society in general. There are some efforts to rise inter-cultural awareness, for example by courses of the Regional Pedagogical Centres (*Regionálni pedagogičeski céntrove*), where courses on intercultural competency, work in a multicultural environment and school drop out prevention are being held. According to data of these centres, in 2005 and 2006, about 5000 teachers each took part in such courses - considerably less than the reportedly 79 000 participants in computer courses following the enforced IT-skills-programme.¹²⁸ There are other courses along other programme lines as well, part of them decentrally organised and therefore not easy to assess. Several courses for teachers, for example on Romanes language, have been organised by NGOs on a dispersed, local level.

Boarding schools for children with behavioural challenges in Bulgaria can be considered as a distinct system of segregated Roma education. Formally, according to the Rules and Regulations for the Application of the National Education Act, these are institutions for children with “deviant behaviour”. Their curriculum is the same as in the schools of general education. The quality of teaching, however, is very poor. According to a 2001 study of the Bulgarian Helsinki Committee, minority children (mainly Roma) in these boarding schools represent between 60 and 70 per cent of the entire student body and reach 95 per cent in some of them.¹²⁹ Some parents perceive these types of boarding schools as a way of removing children from their own parents’ care. Most experts see the boarding schools

¹²⁷ OSI Roma education report, pp. 64-67, and 77.

¹²⁸ Data from website of the national Pedagogical Centre, <http://npc-bg.com> (accessed on 20 February 2007)

¹²⁹ Bulgarian Helsinki Committee: *Socialno-pedagogičeski i vāzpitatelni učilišta-internati* [Social-Pedagogical Boarding Schools and Correctional Boarding Schools], Sofia 2001, pp. 391-392.

rather as places for the deprivation of liberty than as educational institutions. The institutionalisation of Roma children in these “delinquent schools” is being criticised as an illegal procedure. There are attempts to change the system, but not all experts are pleased with the slow pace of changes. In the 2004/2005 school year there were 24 such schools in Bulgaria. Enrolment has fallen from about 3000 in 2000/2001 to 1340 in 2005/2006.¹³⁰ As independent experts take it, the decrease is probably due to the reformed enrolment procedure, which better safeguards against arbitrariness.

2.11 School Education Reform Programme 2006-2015

Parliamentary elections in June 2005 put an end to the government of Prime Minister Simeon Saksokoburggotski and his NDSV. The new government under S ergej Stani ev (BSP, in coalition with the NDSV and DPS) put forward a reform programme for school education in Bulgaria.¹³¹ The programme fulfils a commitment made in the 2006 Budget Act. As can be seen from its title, “National Programme for the Development of School and Preschool Education 2006-2015”¹³², the programme is intended to lay down the guidelines for school education policy for the next ten years. The preface states that the aim of the document is to list existing problems and to propose measures to solve these, including the changes needed to the regulatory apparatus (legislation, orders, etc.) and the timetable for implementation.

In what follows, we outline the reform programme in some detail. The Bulgarian original comprises 41 pages of text, so that while this summary may be quite comprehensive (taking up ten pages of the book), it is obvious that not all aspects can be covered.

As far as possible we have kept to the order of the reform paper, although we have made minor changes in a few places in order to make the proposals more easily understood. In some cases we have added explanatory comments (in *ital-*

¹³⁰ OSI Roma education report 2007, p. 50.

¹³¹ A draft was circulated within the profession at the end of 2005, and the reform programme was officially presented to the public in July 2006 (at a press conference held by the Minister, and through publication of the programme on the website of the Education Ministry).

¹³² *Nacion lna progr ma za razv tie na u il stnoto obrazov nie i pr du il stnoto v zpit nie i podgotovka* (2006-2015 g.)

ics), based on our experience of Bulgarian education, in order to provide the reader with some background information.

The Principal Problems Facing School Education

The paper identifies (in section II) as main problems facing school education:

- **Wrong learning goals:** The focus in school teaching on learning by rote and on repetition instead of the encouragement of independent thinking that fosters abilities.
- **Lack of or inappropriate evaluation:** There is as yet no set of tools with which to evaluate **schools** so that their performance can be compared nationally and so that it can be seen how school education changes over the years. Outdated methods are used to measure the educational achievement of **pupils**; these are demotivating for pupils, particularly in relation to the encouragement of independent thinking.
- **Inadequate school attendance:** A large number of children still fail satisfactorily to complete middle education (*srédno obrazovanie*, the examination usually being taken at the end of Year 12): the report gives a figure of around 25 per cent of each cohort. The proportion is particularly high among the Roma population, and respectively less among others.
- **Low social status of teachers:** Teachers have low social status and little authority in society. Both these problems are attributed to the financial decline in the profession in the 1990s. The effects of “social breakdown” in the wake of the post-1989 transition process are also seen as a cause.
- **Outdated structure:** The network of schools is not “optimally” arranged. Given the decline in pupil numbers in recent years, **too many schools** are in operation, which is regarded as a waste of resources. Vocational education in schools is **out of step with the market** in many regions. Although there are **too many teachers** overall, there is a shortage of teaching staff in certain subjects such as foreign languages and computing.
- **Overcentralization** of the education system: decisions are taken at levels which have little contact with the place where they are to be put into effect. There are

few opportunities for citizens and local and regional authorities to exert an influence.

- The current **method of funding** holds back development and local or individual initiative.
- **Confusion in the regulatory basis:** The education system suffers from a plethora of laws, orders, edicts, administrative regulations and other official documents, which get in each other's way when applied in practice. Some of these documents do not even have a clear legal basis, according to the reform paper.

Basis for the Reform

The programme lists the following as “fundamental **principles of the reform**” of education (section III of the programme):

- “A balance between the traditional values of Bulgarian education and the need for improvement” – *This point, which is not explained further, may be taken to refer to those sections of public opinion which call for a return to the earlier qualities of the education system rather than for modernization or alignment with European standards.*
- “Transparency of school administration, accountability in development, and stability once decisions are taken” – *This is a response to the criticism of muddled reforms in recent years, and it is also directed at parents, pupils and teachers, who fear, after poor past experience, that further reforms will be initiated without the public or those involved being adequately informed, so that they can plan their lives accordingly.*

In order to overcome the problems identified, the ten-year plan proposes the following measures (in Sections V to X of the reform programme):

A) The school education system should give more encouragement than in the past to independent thinking and should contribute to education in the broadest sense (This is Section V of the reform programme)

1. New forms of teaching are to be introduced which will give pupils greater encouragement than in the past to develop their own **abilities**, instead of learning

fixed contents by rote. No mention is made, however, of how this will be done. The only suggestion is that foreign language and computing teaching should be expanded. In addition, the list of training occupations and the national training guidelines for vocational training in the various occupations are to be revised.

2. In order to improve teaching materials, especially **textbooks**, there is a call for texts to be better suited to the age of the learner, and for the removal of “excessive academicism”. Textbooks in any given subject are also to be arranged similarly, to make it easier to change school. Teachers are to be involved more in the selection of textbooks.

3. More IT is to be used in schools. By the end of 2007, every school is to have a high-speed **Internet connection** that is free of charge to the school.¹³³ The establishment of a national **education portal** is also planned, to serve up to a million users at any one time. It is to act as the central point for the exchange of information, materials for preparing examinations, test papers for national examinations, discussion forums, teaching materials, etc. According to the plan, this Internet portal will start operating at the beginning of the 2006/2007 school year.¹³⁴

4. In order to strengthen **education in the widest sense and personality development**, it is proposed: a) that kindergartens should offer greater preparation for school; b) pupils and teachers should be encouraged to develop stronger emotional ties to their schools by means of symbols, rites, traditions, holidays and awards made by the school and the local community; c) schools should become the “territory of the pupil”, with pupils playing a part in planning and decision-making; d) schools should play an active role outside the classroom and the school yard.

¹³³ See p. 111 for details on the results of this process, by 2006/2007.

¹³⁴ In early 2007, the portal was running indeed (<http://start.e-edu.bg>). Experts, teachers and parents criticized both technical aspects and contents. For example, computer experts commented that the portal is based on the open source course management system “moodle”, and therefore not really able to serve up to a million users, as it ought, according to the plans.

B) Monitoring of achievement through standardized national examinations (Section VI of the reform programme)

The school education system is to be subject to permanent internal and external monitoring of achievement. This is intended to help maintain the desired quality standards. It will also ensure that the performance of schools can be compared at national level. A so-called “**test system**” (*téstova systém*) is to be introduced gradually from the school year 2006/2007.

What is meant by “test” is not defined explicitly in the reform paper. From the various points at which explanations of the term “test” are offered, and from the public discussion of the topic, it becomes clear that “test” means a multiple-choice classroom test.

Tests are to be conducted in classes at the beginning and end of the school year, as well as during the year. Teachers will generally compile the tests themselves, using the help and models available from the education server. A database with test questions and support material is also to be created, and will be constantly updated.

The Ministry of Education is to devise a special action plan for the introduction of the tests.

The test system also provides for **standardized national examinations** at the end of Years 4, 7, 10 and 12.* The reform paper also proposes that the planned secondary leaving examination (*matúra*) should take the form of a standardized national test.

C) Fall in the number of pupils of school age not enrolled or dropping out of the education system (Section VII of the reform programme)

Analysis of the current situation: The proportion of school drop-outs in Bulgaria is high by comparison with the EU. According to education authority figures, 19 000 pupils (irregularly) dropped out of the education system in 2004/2005, out of the 963 000 who were initially enrolled. In the eyes of the authors of the reform, one of the consequences of this is that insufficient numbers of young people

* The wording in the paper is: *nacionálno standartizirani ízpiti (téstove)* = “nationally standardized examinations (tests)”.

complete middle education (Year 12) successfully: in the last twelve years, around three quarters of each cohort successfully completed middle education, which the authors of the report regard as too few.

The reform paper proposes the following means of improving school attendance:

1) Changes to the structure of education:

- **Termination of basic education (*osnovno obrazovanie*) at the end of Year 7**, thereby shortening the “basic education” that is the same for all pupils by one year by comparison with the previous system, which required completion of Year 8 for the award of a formal certificate of standardized basic education (*osnovno obrazovanie*). – Having completed basic education at the end of Year, 7, young people will then continue their education either at Profile *gimnazija*, Vocational *gimnazii* or other schools that offer general education. For less able pupils, there is specific mention of the option to begin vocational education at the end of Year 5, 6 or 7, in vocationally oriented parallel classes leading to Level 1 vocational qualifications. – *Compulsory school attendance up to the age of 16 years (i.e. Year 10) continues unaffected of this reform plan.*
- **Division of *gimnazija* education** into two stages: **Stage 1** of *gimnazija* education will cover Years 8 to 10. These classes will still fall within compulsory education. (*The Education Act provides for compulsory attendance to the age of 16 years.*) There is to be a standardized national examination at the end of Year 10 to test acquisition of the legally prescribed “minimum education”. This will lead to the award of a certificate of completion of Stage 1 *gimnazija* education. Depending on the mark achieved, the marks in the three *gimnazija* years and their own wishes, pupils may then continue their education in the same or a different school, or may enter the labour market. – There will also be programmes in this first *gimnazija* stage leading to Level 1 vocational qualifications, chiefly for pupils who intend to leave school at the end of Year 10. – **Stage 2** will cover Years 11 and 12, with some subject specialization that will provide preparation for higher education. It will end with a national examination leading to the award of a certificate of middle education (*matúra*), which will grant access to higher education. Pupils not passing the *matúra* will still have a certificate of completion of Stage 2 *gimnazija* education. – Pupils will also have the opportunity to gain Level 2 or 3 vocational qualifications during Stage 2 *gimnazija* education.

- **In all schools, Year 8 will focus on intensive foreign language learning, IT and/or vocational education:** In principle, all pupils in Year 8 will receive the same general education. However, in Year 8 there will also be a number of options for special intensive training. Three different specialisms may be offered: foreign languages, computing or vocational education, depending on the type of school. Intensive foreign language learning will be provided, 17 hours per week, in Profile *gimnázii*, 15 hours per week in Vocational schools, and 6 hours per week in other schools. The remaining hours in the intensive programme will be used a) in Vocational *gimnázii*, for vocational education, b) in general schools, for more intensive practice in using computers and for modules from a subject referred to in the reform paper as “technology” but focusing largely on such topics as management and entrepreneurship, and c) for arts or sport in schools specialising in those subjects.

Proposed timescale for these changes: It is proposed that this new “structure of education” should take effect for pupils entering Year 5 in the school year 2006/2007. The centralized national examination for pupils at the end of Year 7 will thus become obligatory from the school year 2008/2009. Certificates of completion of Stage 1 *gimnázija* education will then be awarded at the end of the school year 2010/2011, and pupils completing Stage 2 *gimnázija* education will sit the national examination for the first time at the end of the school year 2013/2014.

Anticipated benefits: The authors of the strategy believe that these changes will bring the following benefits:

- Equality of all pupils in basic education: all pupils in a cohort will complete basic education at the same time, will receive a certificate, and will move on simultaneously to the next stage of the education system. All pupils will be able to complete basic education without changing school.
- Compulsory school attendance up to the age of 16 years, as laid down in the Constitution, will be maintained, allied with the possibility of leaving the education system at that point.
- Standardized minimum general education for all pupils of all schools up to and including Year 10
- Horizontal and vertical transferability
- The ability of vocational education and training to adapt rapidly to the needs of the labour market

- Preservation of the traditional intensive foreign language teaching in Year 8, which brings good results
- The opportunity for pupils to embark on educational paths that accord with their interests, abilities and needs
- Motivation of pupils to remain longer in the education system.

2. Social measures to reduce the school drop-out rate

A second measure is provided for in the reform programme in the aim of improving school attendance:

- Access to learning materials free of charge: This is proposed – as at present – for Years 1 to 4, and for all pupils via the education portal on the Internet, as well as for those with learning difficulties.
- Continuation of the school meals programme already in place in Years 1 to 4, which considerably enhances attendance in the estimation of the Ministry.
- Transport and half-board: The reform paper announces that the Ministry will “continue with the purchase of school buses in 2006”. Every Middle school should have a bus or minibus by 2007/2008.
- Stricter tying of social benefit payments to school attendance by children.

3. Special measures for children whose mother tongue is not Bulgarian

The third measure in the reform programme aimed at increasing school attendance overall is a range of provision to assist children who are not brought up to speak Bulgarian at home. The measures focus on the year before school entry, which in any case requires compulsory preparation for school at kindergarten. Expansion is planned in the areas of a) special language tuition b) an environment that fosters greater integration, in mixed kindergarten groups, and c) greater kindergarten attendance as a whole by children from the population groups concerned, which means that the purpose of kindergarten needs to be explained to parents.

D) Enhanced authority and social status for teachers (Section VIII of the reform programme)

The following ways of raising the status of teachers are suggested in the reform paper:

1. Training in teaching subjects and methodology, to spread modern forms of teaching involving pupils more actively. The Government intends to develop a system to manage teacher training and monitor participation by teachers in inservice training at a national level.
2. Establishment of a career system. The introduction of grades will be the horizontal dimension of this career system – junior teacher, teacher, senior teacher, supervisory teacher and methodician (*mladši učitel, učitel, stárši učitel, gláven učitel* and *učitel-metodíst*) – to take account of years of service, inservice training and results of work. The reform paper mentions opportunities for promotion to positions of school head, expert and head of a local education office, or in the Ministry of Education, which are described as the “vertical” dimension. *The reform paper provides no further details but merely states that this will make school management more effective.*
3. Payment by results. The reform programme lists a variety of criteria for payment based on success. However, it is stated that the details still need to be worked out. The introduction of school responsibility for budgeting at the same time (see below) will simplify such payment by results.
4. A system of rewards for outstanding performance by teachers. This is to contain a financial element, but the emphasis will be on moral recognition, for example through public award ceremonies.

E) Improvements to the network of schools (Section IX of the reform programme)

The existing large number of schools is to be reduced. To this end the reform paper mentions:

- a) Measures to reduce the number of small classes or combined classes: at present, the theoretical class size is 18 to 26 pupils. In the school year 2005/2006, there were, however, almost 6000 classes with fewer than 18 and sometimes even fewer than 10 pupils (small classes). Such classes are to be found not only in villages and small towns, but also in provincial capitals and in Sofia. The number of combined classes (consisting of more than one year group) in the school year 2005/2006 was 1940, and there were such classes even in Sofia. One of the ways of avoiding small classes that is mentioned is to make schools respon-

sible for their own budgets (see below). The measures to reduce the number of small classes are to be accompanied by improvements to the school bus system, whole-day schooling and afternoon supervised activities, with the appointment of educational staff.

b) Matching of the network of schools to the needs of the economy and the labour market in the region. Local authorities in particular are to have greater influence on the number and type of school places, especially in vocationally oriented schools.

F) Decentralization of school management (Section X of the reform programme)

Principles: The reform paper puts forward the principle of subsidiarity in school management: decision-making at a level as close as possible to the level at which decisions will be implemented and which is affected by those decisions. The Ministry of Education will in future act less as a managerial body than as a monitoring and regulatory body. The local education offices are to be freed from administrative tasks and to be more concerned with issues of methodology and supervision. The intention is also to involve parents and teachers more in school management.

Decentralization will cover both decision-making powers and the funding of schools. It will extend right down to the level of the school. It will, however, go hand in hand with a system of monitoring and accountability.

1. Key features of decentralization¹³⁵

The local community (parents, teachers, local authority) is to have the key role in the **appointment and dismissal of school heads**. Pilot projects shall be set up for this purpose in ten local authority areas in the school year 2006/2007. The experience gained from these will feed into relevant changes to legislation and regulations. The target date for the nationwide introduction of the new system for the appointment of head teachers is the school year 2008/2009.

¹³⁵ The Bulgarian headline of this section is „*nasóki na decentralizácija*“ (“directions of decentralization”).

Local authorities are to have more influence on the **opening and closing of local schools**. The Ministry will merely check the legality of the steps taken. This will help to make the network of schools more economic, in that local authorities will decide for themselves whether it makes sense to keep a given school open.

The local authorities and provinces (*óblasti*) are also to be given greater responsibility for determining the **number and type of vocational and special schools**. Only those vocational and special schools which are regarded as being of national importance will remain the immediate responsibility of central government.

2. Further requirements for decentralization

Financial decentralization: schools are to be given the right to decide how to use (at least some of) the funds allocated to them and thus to make their own policy. This will include the possibility of paying teachers higher salaries if they can afford it.

Monitoring by the civil society: The rights of school boards (*učilištno nastojatelstvo*)¹³⁶ are to be strengthened, particularly in the area of school budgets and staffing policy. The reform programme also proposes – albeit in passing – the creation of “school councils” (*učilištni sáveti*), which might consist of representatives of the parent body, the teaching body and the local authority and might in future develop into “collective organs of school management”.

Local government is to be given a number of additional responsibilities. One example that is mentioned in the reform paper is the setting of holidays.

3. Changes to the status of school heads

It is proposed that limited-term contracts (*mandátstvo*) should be introduced, so that a reselection process will be needed if the contract is to be extended. Parents, pupils and teachers are to have a say in the selection of the head.

¹³⁶ School boards (*učilištni nastojatelstva*) are a traditional institution in Bulgaria. During the 19th century they were voluntary associations of local worthies who principally used their own funds to run schools. Today, the school boards are defined in the Education Act (s. 46a ff.) as associations with the task of supporting a school (or a group of schools) in every way. School boards now have the same legal status as any other voluntary association. Whether a school has such a supporting association depends largely on local circumstances. Under current legislation (mid-2006), school boards do not have powers of joint decision-making.

There is also a call for the establishment of a Training Institute for Head Teachers, to focus on improving head teachers' managerial, administrative and financial competence. The Institute will provide training both for school heads in post, and for teachers intending to apply for posts as head teachers, in the tasks associated with these. The reform paper states that the Institute is to start work at the beginning of 2007.

The paper also calls for a system to be developed for the monitoring (*atestácija*) of head teachers and their work. *There are no further details of how this is to be achieved.*

G) Introduction of a funding system that fosters development (Section XI of the strategy)

The reform paper states that the principle for the reform of school funding is as follows: on the one hand, the Government must guarantee citizens a minimum standard of education. On the other, resources have to be allocated where they can be used particularly effectively. Funding can thus be a continuing stimulus for improving the system. The funding arrangements need to include the element of subsidiarity and competition.

1) Decentralization and budget responsibility

Most state schools are in future to be funded via the local authority ("decentralization"). Schools are to have responsibility for how they use the largest possible proportion of their budgets ("delegated budget"). It will be possible to carry forward funds not used one year to the next year, instead of returning these to the Ministry as at present. Changes in labour legislation will also allow schools to set the level of teachers' salaries, within certain limits. The so-called "school board" will be given greater powers to manage the budget.¹³⁷ "School councils" will also be formed, which will have financial responsibilities. (*The strategy does not explain the composition of such councils, however, nor what is the difference between school boards and school councils.*)

¹³⁷ See the footnote on p. 135. for more information about school boards (*uilištno nastojatelstvo*).

According to the plan, the system of „delegated budgets “ shall be implemented in all schools by end of 2008. A precondition is, that necessary preparation has been finished, i.g. the school heads must be trained, and there must be ways of civic control of the school budgets. – *Thinking of recent experiences with poor performance of reform plans in the Bulgarian education system, one might doubt that these plans really will be implemented in such a short time.*

2) Introduction of financial stimuli for effective management and quality of education

The reform paper proposes the creation of financial incentives for schools which fulfil certain quality criteria. Possible criteria that are mentioned are: well-filled classes (thus avoiding small classes), optimal staffing, use of new teaching methods, particularly successful teaching, teaching outside the classroom, and out-of-school activities.

3) Standard funding per child

In the funding of schools, staffing and material costs are no longer to be kept separate, but a combined sum is to be allocated on the basis of a “per pupil” calculation. However, regional, geographical and demographic differences shall be taken into account (scattered communities, mountainous regions, rural areas, etc.) although some mechanism must first be devised for this purpose. (*The forecast in the reform paper that this “unified standard” can be introduced from 2007 therefore seems somewhat unrealistic.*)

Extension of the principle of “funding by programmes”

The authors of the reform paper hope that funding “based on national programmes rather than on institutions” will make the implementation of education policy goals more effective. *No further explanation is given in the paper.*

5) Creation of a system for differential payment of teachers

(There is no further discussion of this point in the reform paper. The idea, however, is to link teachers’ salaries to a range of criteria for their performance at work. In early 2007, there were negotiations between the Ministry, the teachers’ union, etc. in order to define such a list of criteria, see Section 2.6 (Teachers) from p. 101.)

6) The “cash per pupil” principle extended also to private schools

The authors of the reform paper anticipate that the number of privately sponsored schools will rise when Bulgaria joins the EU. These schools will eventually also receive state subsidies according to the “per pupil” principle, but a number of questions such as quality control need to be resolved first. Such funding of private schools is therefore not expected before 2009.

H) Improvements to the regulatory basis (Section XII of the reform paper)

The following are stated to be the most significant improvements to the regulatory basis (legislation, orders, etc.):

- Management of the education system on the basis not of decisions by individuals but on that of rules that are generally applicable.
- No more government instructions issued without a clear basis in law
- Changes in existing regulatory texts and / or drafting of new texts, so that the plans described above can be implemented. The reform paper lists the regulatory texts affected: three laws (*zakón*), two implementing orders (*právilnik*) and around 20 instructions (*narédba*). The following are mentioned as regulatory texts that need to be newly drawn up: an order on out-of-school activities and teaching outside the classroom; an order on criteria for evaluating teachers' performance; an order on procedures for setting teachers' salaries; an implementing order on the establishment and activities of the Training Institute for Head Teachers; an order on the powers and training of head teachers; and an order on the attestation of head teachers.

The reform paper recommends that all these matters should be resolved at once through the creation of an entirely new, comprehensive law in order to avoid confusion and double regulation in the interim.

Implementation:

The Ministry of Education is to submit a report on 1 October each year on progress with the implementation of the reform project.

2.12 Summary (to Education System)

Three features of Bulgarian education are at the moment particularly striking. First, the education system is contracting as the number of students and hence the number of schools decline. Secondly, it is undergoing a process of transition, being reformed and modernized in line with European legislation. And thirdly, these changes in the education system are beset by a series of problems which are having a negative effect on the quality of education.

These include the mismatch between both school and higher education and the needs of the labour market, the fragmentation of higher education into almost 300 courses, and the fall in student numbers, which will have a negative effect on the education structure of the entire population. There is also a shortage of funds to renew school equipment. Other problems that are discussed are the oversupply of teachers, their training, their low motivation and their excessive workload, caused particularly by low pay.

Since the seismic shift in the political system in 1989, the quality of upper secondary and higher education has generally deteriorated – a process that began about five years after the change of regime, the consequences of which are still being felt.

School education is suffering from a shortage of instruction in foreign languages and everyday computer skills. The education system is still not giving pupils the practical skills they require, does not encourage independent thinking and is not teaching the ability to continue learning for oneself (“Lifelong learning”), which is so vital today. Overall, there is also no system as yet of evaluating educational outcomes.¹³⁸

School attendance by children from the Roma minority urgently needs to be improved. The problem of separate schooling for Roma children also needs to be resolved. Roma children are generally taught together (because the Roma usually live together in particular areas), and this lowers the educational level of school classes.

¹³⁸ See Julijan Genov: *Zašto tolikova malko uspjavamo* [Why we are so unsuccessful]. Sofia 2004. p. 459.

There are therefore plenty of opportunities for improving the education system in Bulgaria. The ten years reform programme for school education which we have described in the last section of this chapter tries to define ways for enhancements. However, reform of an education system is difficult and complex in general, and the previous experience with education reform in Bulgaria show that a reform programme can fail completely.

In a Government Education Report to the EU, the Ministry of Education listed the main difficulties from its own perspective: "Main difficulty in realising the national policies for education and training are the limited financial resources. On the present stage, the financing of the Bulgarian education and training is performed mainly by the national budget, with quite limited participation of the business. The insufficient investments could effect negatively onto the quality of training. The employers still do not regard the training as a form of investment. In relation to the priority of improvement the conditions for access to education and training, main difficulties are the poverty and the social isolation, also a big part of the Bulgarian population has no access to information or suffers of lack of motivation. There are difficulties concerned with optimisation of the network of professional schools and the network of higher schools too, mainly due to the big resistance on regional level. Some difficulties exist in determining the needs of training with maximum accuracy, and their commitment with the real future needs. The rates of computerising the training process and introducing ICT are insufficient too."¹³⁹

Resistance against changes at a regional level is definitely a problem. Education institutions and institutions of the social welfare system as boarding schools and schools for children with special needs often are an important, if not the single, source of income in a local community like a village in remote regions. Locals are used to the commodity of an admittedly small but constant income with often not too hard work. Therefore, it is difficult to close down such institutions.

The problem of business not being interested in funding the education system or investing in its own educational provisions is well known and chronic.

¹³⁹ Education and Training 2010. Bulgarian contributions to the 2006 Joint Report of the Council and the Commission, p 2. (Official English version.)

3 Prerequisites of Adult Education in Bulgaria

This chapter describes the basic prerequisites of adult education in Bulgaria: laws, political documents, statements and programmes, relevant authorities and other institutions involved, and more or less successful attempts of defining educational needs.

The description focuses on vocational adult education, since this sector is the more developed in Bulgaria both within the school system and through private providers, where it is subject to control by the authorities. Thus, legal and administrative provision concentrate on vocational education. Political and cultural education is less regulated. One important exception is the work of the *čitálište* cultural centres the legal status of which hence will be discussed below in detail.

3.1 Legislation

Although adult education should have other components as well, the legislative framework in Bulgaria clearly places emphasis on vocational training. Political and cultural education is mentioned in various Acts, but is not given the requisite weight. The following sections present the legislative framework of adult education in Bulgaria (as it was by 2005 or 2006).

3.1.1 Vocational Education and Training Act (ZPOO)

The Vocational Training and Training Act (ZPOO) has been discussed thoroughly in Section 2.2.3 (from p. 65) together with the other Acts of importance to the formal education system (Education Act, Higher Education Act and Stages of Education Act).

3.1.2 Labour Code (KT)

The most essential regulatory text in the field of employment in Bulgaria is the Labour Code (*kódeks na trudá*). This sets out all the ways in which those in employment can receive vocational training.

According to this Act, continuing vocational training may only be pursued with the agreement of both employer and employee. Depending on need and particular circumstances, there may be three types of contract between employer and employee:

- Skills training contract (*dógovor za pridobívane na kvalifikácia*)
- Training placement contract (*dógovor za stažúvane*) and
- Skills updating or retraining contract (*dógovor za povišávane na kvalifikáciata ili prékvalifikácia*).

The employer has the greater influence on whether continuing vocational training takes place since the Labour Code leaves it to the employer to decide whether to offer a vocational training contract or not. However, in practice employers are very reluctant to do so (see Section 4.5, from p. 192).

3.1.3 Employment Promotion Act (ZNZ)

The Employment Promotion Act (*Zakón za nasǎrčávane na zaetosttǎ*, ZNZ), which was passed by Parliament in January 2002, is the first law in Bulgaria to state that education and lifelong learning are the most important factors in securing employment (s. 44-46). It replaces the earlier Unemployment Benefit and Employment Promotion Act (*Zakón za zakrila pri bezrabótica i nasǎrčávane na zaetosttǎ*). Its provisions on vocational training for the employed and the unemployed complement the Labour Code.

Promotion of vocational training. The Employment Promotion Act sets out the options for the funding of continuing education and training by employers, the recruitment of new staff and the creation of training placements. Every employer can in this way apply for a state grant of up to 50 per cent of the cost of providing employees with vocational training (s. 44). Employers who take on and train those who were unemployed can have up to six months' salaries refunded by the state. Training placements are also supported, especially for young people who dropped out of the school system early. These grants are awarded in consultation with the regional employment offices (s. 30 and s. 46).

The Act also provides for **employment programmes** associated with the training of young people up to 29 years of age. This training may not last longer than 12 months. The programmes are funded by the employment offices (s. 36).

Those defined as **unemployed** under the terms of s. 17 of the Labour Code may take part free of charge in training courses organized by the employment offices (that is, courses commissioned from suitable local training providers), and may receive bursaries. According to data from the Employment Agency (*Agencija po zaetosttá*),¹ over 38 000 unemployed persons took part in courses which it had arranged in 2003. That represented 7.6 per cent of the total number of persons registered as unemployed. In 2006 the number of such participants was 42 000, accordingly to a press release of the Ministry of Labour and Social Policy.²

Supervisory authority. The Employment Promotion Act states in Chapter 7 (“Training leading to a vocational qualification”) that vocational training lies within the field of responsibility of the Ministry of Labour and Social Policy,³ which is to manage this policy area jointly with the Ministry of Education. The Ministry of Labour and Social Policy is thus essentially responsible also for vocational adult education since those in employment and the unemployed account for a large proportion of “adults” (persons aged 16 years and above).

The Act also gives the Ministry of Labour and Social Policy and the Ministry of Education other key functions, such as the operation of a nationwide education and training system allowing the unemployed to gain vocational skills (s. 58 para. 2) and continual analysis of adult vocational training needs (s. 58 para. 3). Amendments to the Employment Promotion Act since 2003 have further expanded existing employment promotion schemes and adult vocational training programmes:

- The financial incentives for employers to offer secure employment and enhance the skills of their employees have been improved.

¹ See the Agency's website www.az.government.bg.

² “Arbeitslosenrate weiter gefallen“, *Bulgarisches Wirtschaftsblatt*, August 2006, p. 11.

³ *Ministérstvo na trudá i na sociálnata politika, MTSP*.

- On behalf of the state, licensed vocational training centres are to provide short and long-term training courses for the employed and the unemployed which are fully funded by the state via the Employment Agency (*Agéncija no zaetosttá*)⁴.

There are a number of problems in the **implementation** of the Employment Promotion Act. For a long time after the introduction of the Act On 29 December 2001, there were no rules for its implementation, and these were not issued until June 2003. Providers of vocational training courses such as the new vocational training centres (CPOs), who are now obliged to arrange a training placement lasting at least one month at the end of each course, complain of the difficulties of finding such places for trainees. In particular, they suffer from the bureaucracy involved in arranging insurance, salaries, etc.

3.1.4 Trades Act (ZZ)

The 2001 Trades Act (*Zakón za zanajátite, ZZ*), which governs the exercise of craft trades, the organization of the craft trade body and training, is influenced by German experience and traditions. It was drafted with the assistance of the Koblenz (a town in Germany) Chamber of Craft Trades, which has involved itself in the development of craft trades in Eastern Europe, using German Federal Government funding. The Koblenz Chamber of Craft Trades also was behind the establishment of the Bulgarian Chamber of Craft Trades in 1998.

“Craft trade” (*zanaját*) is taken to mean the production of goods and the provision of services that are specifically listed at the end of the Act. The list of craft trades, as defined by the Act, currently (2007) comprises 127 vocations.

For the training of tradespeople, the Act provides for three stages of craft trades training, supposed to follow the principle of combining practical work and theoretical instruction. The three stages are, in line with older Bulgarian and other European traditions, apprentice (*čirák* = apprentice, *čirakúvane* = apprenticeship), journeyman (*kálfa*) and master (*májstor*). Apprentices must be at least 16 years of age.

⁴ The local branches (employment offices) are known as *Bjurá po trudá*.

More details on the regulations of the Trades Act, and on its history, are to be found in the Section on Apprenticeship Training in craft trades, from p. 202.

There are other regulations, adopted by the National Chamber of Craft Trades, that are based on the Trades Act: the **Apprenticeship Training Regulation** (*Právilník za redá I uslovojata za provéždane na zanajatčijsko obučenie na čiraci*), as approved by the National Chamber of Craft Trades (NZK) on 30 June 2006.⁵, the **Regulations for the Journeyman Examination** (*Právilník za provéždane na kálfesni izpit*) as adopted by the NZK in December 2004 for the first time, with most recent amendment (as for April 2007) made in April 2006, and the **Regulations for the Master Craftman's Examination** (*Právilník za provéždane na májstorski izpit*) as adopted by the National Chamber of Craft Trades (NZK) in April 2006. For details see again the Section on training in craft trades, from p. 202.

3.1.5 Associations Act (ZSNC)

Bulgarian legislation also allows adult education to be provided by another kind of institution: foundations and voluntary associations which pursue social or private aims, provided that they are not profit-making (for short: NGOs). According to the legislation, such organizations may be set up by Bulgarian and foreign natural persons and corporate bodies. The relevant Act, which dates from 2001, is entitled the “Non-Profit Making Legal Persons Act” (*Zakón za jurídičeskite licá s néstopanska cel*). We call it the “Associations Act” for short. The associations covered by the Bulgarian Act will be referred to below for practical reasons as “associations / organizations”. (An explanation to problems of terminology will be found in the Appendix from p. 300.)

In recent years, some information has been published about the number of associations / organizations in Bulgaria. It is difficult to count them since there is no centralized register, except for those also recognised as serving the public good. Counting is made more difficult by the fact that many associations / organizations only exist for a limited time or carry out no real activities once they are established.

⁵ The regulation is available from www.nzkgb.com (accessed on 9 April 2007).

Roughly, it can be said that there are around 3500 associations / organizations, only some of which are truly active. Mention should also be made of the 3000 or so cultural centres (*čitálišta*), only a third of which perhaps arrange activities (see below). Associations / organizations and cultural centres operate under two different laws, although they are very similar in content.

It is difficult to say how many of the registered associations and organizations are concerned with adult education. They certainly include numerous NGOs that have come into being in recent years, particularly as a result of the opportunities for support from abroad, and work in fields such as interethnic understanding. A few examples are described in Chapter 4 from p. 218.

3.1.6 Cultural Centres Act (ZNČ)

The cultural centres (*čitálišta*, also known as “reading rooms”) are an institution with a long tradition in Bulgaria. They were established in the 19th century, during the time of Ottoman rule, as educational facilities sponsored and funded by the local elite. They generally began with public libraries in towns and villages, but soon went on to organize theatrical performances and other events, latterly including even film shows and thus being the pioneers of Bulgarian cinema which shows their relatively progressive approach to culture and education. They also offered a wide array of courses.

These original adult education institutions continued to operate under the socialist regime, although naturally subject to the cultural policy then controlled by the state, so that their activities changed, concentrating heavily on work with children, folk dance courses, singing etc. Today, some cultural centres are trying to find a new role under changed cultural and economic conditions, by doing such things as coming together in national networks.⁶

The cultural centres play an important part in non-formal adult education. In many places, especially in villages, they are the only institutions which provide non-formal educational opportunities for children and adults. Throughout Bulgaria there are presently around 3500 cultural centres, some 2500 of them in rural

⁶ For the current role of the cultural centres as providers of adult education in Bulgaria see Section 4.8 from p. 211.

areas. Many have their own building, while others take the form of local educational associations which use local authority premises. Many only exist on paper or have a management committee of (often elderly) local inhabitants but no programme.

The national network of cultural centres is nonetheless of extreme importance for adult education, since it extends to practically every village. Furthermore, people are familiar with the cultural centres, they enjoy a good reputation, and they often even have a strong emotive appeal.

The 1996 Cultural Centres Act (*Zakón za národnite čítališta*, ZNČ) governs the activities of the centres by setting out the rules for establishing, operating and funding them.

It is stipulated, for example, that cultural centres are associations which may have both individual and collective members. According to current legislation, the individual members must be Bulgarian citizens, although foreigners may also be elected honorary members. Cultural centres are managed, as is the usual practice in voluntary associations, by a “general meeting” (*óbsto sábránie*) of voting members, a board of management (*nastojátelstvo*) appointed by the meeting and a supervisory committee (*proverítelna komisija*).

All the ways in which associations may be funded are set out in the Act: membership subscriptions, receipts from cultural events, subsidies (*subsídii*) from national and local government, donations and rental income from property.

The Act gives local authorities particular responsibility for maintaining cultural centres by making them liable for around half the costs if a centre cannot maintain its premises by itself (s. 23.2). The Act also exempts cultural centres from all national and local government taxes and dues relating to their “core activities”. This obviously makes *čítalište* a favourite way of legally registering voluntary associations, and they may even become a cover for the grey economy, although this issue only affects adult education indirectly. Section 4.6 from p. 200 discusses the activities of cultural centres in greater detail.

3.1.7 Summary (to Legal Framework)

There seems to be an appropriate legal framework for the development of adult education in Bulgaria. Some legislation, however, is so recent that there is not much experience of how it may operate. It remains to be seen what the effect of the new legislation will be, and where the difficulties lie.

The Cultural Centres Act, and the network of cultural centres which it governs, are an excellent basis for the further expansion of adult education institutions.

The Vocational Education and Training Act (ZPOO) has brought considerable movement to the free market by providing for the licensing of vocational training centres (CPOs), and there is at least the prospect that the quality of provision can be assured with the assistance of the National Agency for Vocational Education and Training NAPOO, although politically motivated intervention may be a problem in this case as well. The EU should offer help to guarantee the level of quality and international compatibility.

Concerning the Labour Code (*Kódeks na trudá*) which provides several kinds of agreement between employers and employees about continuing training, the problem is rather a practical and political one since employers are not sufficiently committed to vocational education and training (see the respective chapter of the book).

Experts in the field of adult education however still ask for a separate **Adult Training Act**.⁷ They argue that such an act could lead to systematizing the legislation and thus facilitating adult training in the context of Lifelong learning. A separate Adult Training Act could provide a legal recognition (validation) of informal and non-formal learning. It could serve as an institutional framework for funding and could contribute to perceiving Lifelong learning as an inherent human activity in modern society. A separate act on adult training would also unify, harmonize and simplify the existing legislation in the field of adult training.

⁷ Recently, the authors of the “Adult Training Strategy” have put forward the topic. For details on this strategy see p. 157.

3.2 Classifications

3.2.1 National Classification of Occupations

In January 2006 a new system has been introduced in Bulgaria to classify occupations, chiefly for administrative purposes such as defining wages, taxes and insurances. The National Classification of Occupations and Offices (*Nacionálna klasifikácija na profesijite i dlžnostite*, NKPD) replaces the older Bulgarian system called NKP from 1996. The new NKPD usually is cited as NKPD 2006, due to the date when it came into force. It corresponds to ISCO 88 (International Standard Classification of Occupations) of the International Labour Organization (ILO). The Bulgarian NKPD divides jobs into 10 classes, 28 sub-classes, 118 groups and 401 sub-groups, ending up in about 5000 separate occupations, each with a eight-digit code, as 9322-0033 “worker processing transformer oil”, 8272-2004 “machine operator, pasteurisation machine”, 2223-7010 “veterinary surgeon” and (last but not least) 1111-9001 “President of the Republic of Bulgaria”. Compared to the earlier classification, about 400 vocations have been added, after companies, institutions and organisations had suggested such changes. The NKPD is accessible through the website of the Ministry of Social Policy and Labour.⁸ The set of files includes tables to compare NKPD classifications with ISCO 88 and the older Bulgarian NKP.

3.2.2 List of Vocations for Vocational Education

In 2001, the VET Agency (NAPOO) has adopted a „List of Vocations for Vocational Education and Training“ (*Spisák na profesijite za profesionalno obrazovanie i obučenje*, SPPOO), as prescribed by ZPOO s. 6 and s. 42. According to the law, this list has to be used by all institutions providing vocational education, such as Vocational *gimnázii*, Vocational schools and CPOs. The documents lists systematically all vocations that can be taught, and the corresponding level of vocational training (from Level 1 to Level 4, see p. 67). For example, group 523 defines “electronics and automatisisation”. One of the vocations inside this groups is 523010, and speciality 5230102 is telecommunication systems. To this speciality,

⁸ www.mlsp.government.bg/class (accessed on 12 April 2007).

the list attaches VET Level 3. Additionally, it shows, to what group of vocations according to the National Classification of Occupations (NKPD) the respective vocation belongs. The list corresponds to the International Standard Classification of Education, ISCED 97. A current version of the SPPOO is available at the website of the VET Agency (NAPOO).⁹

3.2.3 Conclusion

In the context of this plethora of strategy papers, action plans, commissions and committees (only some of them have been mentioned here), it should not be forgotten that it is one thing to write a programme paper, and another to implement it. In practice, there is often a lack of the funding, competent staffing, continuity of ministerial administration and political will needed to implement the proposals. A famous example of the inability of state agencies to carry through reform is the failure of the project to modernize the Bulgarian education system with World bank funding, which had to be abandoned after a third of its intended duration because the institutions involved, especially the Ministry of Education, were incapable of planning and implementing the reform.¹⁰

3.3 Plans, Strategy, Programmes

The essential features of education and training policy in Bulgaria are laid down by the Parliament (jurisdiction), the Government as a whole or the relevant Ministries (regulations, implementation rules, etc.) The Parliament has got a special Education and Science Committee which drafts the final versions of bills, and is responsible for the education and science budget.

Additionally, the political parties and coalitions may set up programme papers in order to promote their educational politics. For example, the Sakskoburgotski Government, which was elected to serve from 2001 to 2005, published a Gov-

⁹ www.navet.government.bg, choose menue “*profesionalno obrazovanie*” (accessed on 12 April 2007)

¹⁰ This case was investigated thoroughly. The results are reported in Rumen Avramov et al.: *Dăržavata sreštu reformite* [The state against reform]. Sofia 2004.

ernment programme giving particular weight to “human resources”, entitled “The wealth of Bulgaria is its people”.

The subsequent shift leftwards in the balance of political power that occurred in June 2005 then was expected to increase the opportunity for the trade unions once again to play a greater role in adult education...

In this section we describe a series of documents and agreements which set out the way ahead for education and training policy and for adult education in Bulgaria.

3.3.1 Convention on Technical and Vocational Education

The Convention on Technical and Vocational Education, consisting of 15 articles, was proposed by UNESCO and signed in Paris in 1989.¹¹ The convention consists of a series of quite general provisions and principles for technical and vocational education. In Bulgaria it came into force on 1 October 1994, after ratification by the Government (the Council of Ministers). By adopting the Convention, Bulgaria declared its willingness e.g. to draw up plans to enable young people and adults to expand their knowledge and skills in order to enhance their economic, social and personal development. Further, Bulgaria agreed to set up appropriate legislation, to prevent discrimination, to provide equal access to vocational education, to pay attention to the special needs of handicapped, to follow a series of requirements concerning economy, demographic development, protection of environment and cultural heritage etc, to design flexible and open-ended educational structures, to provide clear definitions of requirements for each occupational level, to review periodically the structure of technical and vocational education, to provide well trained teaching personnel, to cooperate in international exchange on vocational education, especially to promote international exchange of students and teachers, etc.

¹¹ Convention on Technical and Vocational Education. Siehe die Datei 084696e.pdf auf <http://unesdoc.unesco.org>.

3.3.2 Government Paper on Lifelong Learning

In the wake of discussions on the European Commission Memorandum on Lifelong Learning, the Ministry of Education put forward a paper on developments to date and possible future steps in this field.¹² The document was drafted by a “Lifelong Learning Committee” made up of representatives of Ministries, the social partners, NGOs, occupational associations, research and teaching establishments, and state occupational organizations. The report by the Lifelong Learning Committee sees as the greatest challenge for the future to improve cooperation between institutions. When the document was published, critics said that there was no shortage of concrete ideas in the document but a lack of suggestions as to how these are to be implemented. In the meantime, and especially after Bulgaria having joined the EU in 2007, one might think that lifelong learning as an idea has made its way into the consciousness of the general public, not least of all because of the work of institutions such as *dvv international*, events such as the “Lifelong Learning Weeks” etc. which are helping to bring about a change. Indeed, virtually all strategies, action plans and other programmatic papers mention lifelong learning as a basic guide. So does the “Operative Programme for Development of Human Resources 2007-2013” which was the most recent one (and with 150 pages the most detailed) in a never ending series of strategies and other papers. In this paper, for example, we read statements such as “Lifelong learning and vocational training are key factors for the preparation of qualified personnel which are of growing importance for the Bulgarian economy.”¹³

3.3.3 National Economic Development Plan 2000-2006

The National Economic Development Plan (*Nacionálen plan za ikonomičeskoto razvítie, NPIR*)¹⁴ for the period 2000-2006 contains proposals for education and training measures that make reference to lifelong learning. The Plan provides for steps intended to lead to economic development and social and regional im-

¹² In Bulgarian: *Meždupravítelstven dokumént za účeneto prez célja živót.*

¹³ Human Resource Development Plan 2007-2013, p. 33.

¹⁴ See the website of the *Agéncija za ikonomičeski análizi i prognózi* (AIAD): www.aeaf.minfin.bg/bg/publications.php?l=1&c=20 (accessed in August 2006). The has been published in June 2003. The English short name officially used is NEDP.

provements. Some of these measures are connected to preparing Bulgaria for EU entry.

More specifically, the Plan sets out six long-term goals: (1) strengthening the institutional framework and improving government administration, (2) improving the competitiveness of the Bulgarian economy – especially in the areas of industry, tourism, and small and medium-sized enterprises – and increasing exports, (3) expanding and modernizing the infrastructure and protecting the environmental, (4) raising standards of living and accustoming the public to the new economic circumstances, (5) achieving balanced and stable regional development by taking advantage of opportunities for cross-border cooperation, and (6) developing agriculture in rural areas.

Aim number 4 - raising standards of living and accustoming the public to the new economic circumstances – is of particular relevance to lifelong learning, and hence also to adult education. It provides for:

- More training opportunities for the unemployed, especially those who have not satisfactorily completed eight-year basic education
- Enhancing the quality of education and training provided by employers
- Raising the skill level of workers and reducing unemployment
- Reform of the vocational school system so that it better matches the needs of the labour market

These tasks are also reflected in the “National Employment Action Plan” (*Nacionálen plan za déjstvie po zaetosttá*).

3.3.4 Plan to Combat Poverty

A “Strategy to Combat Poverty and Social Isolation” (*Stratégija za borbá s bednosttá i sociálnata izolácija*) was adopted by the government in 2003. Based on this, a “National Plan to Combat Poverty and Social Isolation” as developed, for the first time in 2004. The most recent version is the “Updated National Plan to Combat Poverty and Social Isolation, 2005-2006” (*Aktualisíran nacionálen plan za borbá s bednosttá i sociálnata izolácija, 2005-2006*). This Plan lists a broad range of projects, both of governmental institutions and NGOs. They are grouped into six overall objectives: • Employment promotion • Higher income for poor and those in danger to become poor • Easy access to resources, rights, welfare

and services • Prevention of social isolation risk • Social support to vulnerable groups, families and individuals. • Mobilisation of all involved institutions, organisations and communities.

Particularly the first objective –employment promotion– concerns adult education, since many projects concentration on education and training. For instance, the 2005-2006 plan provided projects for development of agriculture and alternative farming in the Rhodope mountains, training of paramedics, training units for small business start-ups, re-training for women to help them enter the labour market after child care, etc.

In order to co-ordinate the various measures and projects, a National Council (*Nacionálen sávéť za koordinírane na polítikite i prográmite za namaljavane na bednosttá*) has been created in May 2005. Members are representatives of the relevant Ministries, other authorities, and the social partners. The Council has advisory capacity. It is attached to the Ministry of Social Policy and Labour.¹⁵

3.3.5 Employment Action Plans

A “National Employment Action Plan” (*Plán za déjstvie po zaetosttá*) has been issued by the Ministry of Social Policy and Labour regularly since 2001, as the annual instrument of the *National Economic Development Plan* mentioned above.

The annual *National Employment Action Plans* cover Phare Programme activities and measures taken by Ministries including Education, Labour and Social Policy, and Economic Affairs, together with several other institutions, international donors, companies and NGOs. They are relevant for adult education since most of the programmes that are financed in this way aim not only on active labour market policy but at vocational or basic education. Via the National Employment Action Plan every year are spent millions of leva for various education programmes. The National Employment Action Plan for 2007, for instance, has a budget of 289 million leva (148 million euros). Most of the projects covered by the plan combine employment and VET, so that it is difficult to say how much money is spent for

¹⁵ *Nacionalen doklad po strategiite za socialna zakrila i socialno vključvane na Republika Bálgarija za perioda 2006-2008 godina*, p. 20. (www.mlsp.government.bg/bg/docs/National%20Report%20SPSI%202006-2008_BG.Final.doc, accessed 11 April 2007)

education only. Some of the programmes in the 2007 plan that emphasize VET are as follows: • The project “*Krasíva Bǎlgarija*” (Beautiful Bulgaria) in which unemployed get trained in a building profession while renovating public places (22 million leva, 2300 employed and 1400 trained) • Various kinds of training courses organised by the Employment Agency in compliance with s. 63 para. 1 of the Employment Promotion Act (12 million leva, 21 000 course participants) • Several projects financed by Phare and other donors to enhance employability by vocational education (72 million leva, 11 000 participants). It would not make much sense to list all the single projects here. The National Employment Action Plan can regularly be accessed from the website of the Ministry of Social Policy and Labour (www.mslp.government.bg/bg/docs).

There is also an “**Employment Strategy for the period 2004-2010**”. It was adopted in 2003 and provides on about 50 pages a variety of activities concerning very many government institutions. Most activities rather concern economic policy, but there are several tasks defined that have to do with adult education, for instance the task to improve entrepreneurship skills, general improvement of human resources etc. The Strategy is available (in Bulgarian) from the website of the Ministry of Social Policy and Labour, www.mslp@government.bg.

3.3.6 Continuing Vocational Training Strategy 2005-2010

In 2004 the Government presented a new paper entitled “National Strategy for Continuing Vocational Training in the Period 2005-2010”,¹⁶ setting out a programme for improving and expanding the opportunities for continuing vocational training in Bulgaria in the years to 2010. The paper was written by a committee composed of representatives of various Ministries, the National Agency for Vocational Education and Training NAPOO, commercial bodies and the trade unions.

¹⁶ *Nacionálna stragégija za prodǎlzǎvaštoto profesionálno obučenie za perióda 2005-2010 g.* An annotated German translation of this 20-page paper by the author of this book can be downloaded from the website of the *dvv international* in Sofia (www.iizdvv-bg.org). An English print version should be available from the Ministry of Education and Science or from GOPA Consultants (www.gopa.de). The Bulgarian version was available from NAPOO: www.navet.government.bg/Sections/conedu/strategy_prof_edu-2005-10.pdf (accessed in August 2006)

The Strategy is concerned with all vocational training for adults (from the age of 16 years), in the aim of making them better prepared for the European labour market. Personal development is also addressed. The Strategy sets targets for the development of continuing vocational training, making reference to the discussion of lifelong learning throughout Europe and naming the institutions responsible for implementing it. According to the paper, these comprise civil society organizations and the social partners, as well as Government Ministries and specialist agencies.

Five areas are specifically listed for the proposed continuing training offensive: (1) improving access to continuing vocational training, (2) more effective cooperation between the institutions concerned with continuing vocational training, (3) ensuring higher quality of continuing vocational training, (4) increasing investment in continuing vocational training, and (5) providing a scientific basis for continuing vocational training.

A number of specific individual proposals are then attached to these areas. Deadlines are set for the implementation of each proposal, and the Government agencies responsible are named (usually the Ministry of Education and the Ministry of Social Policy) along with the other institutions involved. Examples of such individual proposals are “Finding and disseminating good practice in continuing vocational training”, “Designing projects to train employers in small and medium-sized enterprises to draw up their own plans for the development of human resources in future”, or “Creating an administrative structure to coordinate cooperation between authorities”.

Possible sources of funding are mentioned (the national budget, Phare, etc.), but specific figures are not given, at least in the version of the programme in our possession in June 2005. It is merely stated that appreciably more needs to be invested in vocational training in anticipation of EU entry.

3.3.7 Adult Training Strategy for 2007-2013

In 2006, a consortium¹⁷ led by the German consultant company GOPA wrote an Adult Training Strategy for Bulgaria, aiming to “improve adult training as a contribution to the development of the economy, the society and the individual in the Republic of Bulgaria”. This was a 1.3 million euros project under the Phare 2003 programme of the EU (EuropeAid/120163/D/SV/BG), co-ordinated by the Ministry of Labour and Social Policy that is the. The task, according to the tender, was a) to develop a system for studying, identifying and monitoring of employers’ and employees needs for vocational training and b) to develop a strategy for adult learning, particularly including methodology and content for vocational training of adults.

The team worked on the project from late 2005 until end of 2006. For designing the strategy, the project team relied on a network of experts from all relevant organisations and institutions, such as the Ministry of Education, the employers’ unions and the trade unions. A series of conferences and seminars were held. The initial idea was that the government (the Council of Ministers) should adopt the strategy, as it has done with other strategies as well. When this book went to print in April 2007, the strategy had not yet been adopted by the Bulgarian government. It is up to the Ministries that were the beneficiaries of the Phare project to press ahead with this process.¹⁸

In what follows, we present the strategy as it was in November 2006, then available from the project website.¹⁹

The introduction presents a general analysis of the situation in Bulgaria in the context of the country’s economic development and its accession to the European Union (EU). The analysis outlines a number of strengths and weaknesses of adult

¹⁷ GOPA Consultants in co-operating with Alpha Research Ltd, IIZ/DVV and the Balkan Institute for Labour and Social Policy (BILSP), all from Bulgaria. GOPA Consultants has been involved in VET development in Bulgaria for several years now, especially in setting up the German-Bulgarian Vocational Education Centres BGCPD, see p. 191.

¹⁸ In early 2007, some of the authors of the strategy thought that the strategy perhaps never would be adopted by the Council of Ministers, but rather would be used to fuel the next Phare project in this area (BG2004/006-070.01.01, Development of an Adult Training Centre Network.)

¹⁹ www.gopavet-bg.org. The site was closed down after the project was finished.

training which serve as a basis for identifying the necessary measures and steps for overcoming the problems in this field.

The strategy defines seven priorities in the field of adult training, including the respective activities, expected outputs, funding sources, deadlines and indicators of achievement for each of the priorities. The seven priorities are:

- 1) Improving the conditions for access to adult education and training and bringing training closer to adult learners.
- 2) Improving the response of adult training to the labour market and improving the flexibility of training provision
- 3) Improving the opportunities for personal development through training in key competencies²⁰
- 4) Improving adult training methodology.
- 5) Developing the recognition / validation of knowledge and skills obtained as a result of non-formal or informal learning, evaluation, certification, documentation
- 6) Improving the quality of adult education and training
- 7) Developing research and development (R&D) and applied activities in the field of adult training

For each of the priorities the strategy suggests between 5 and 10 activities. We present the full list of activities in the Appendix of this book, from p. 326, because they can serve as indicators what is at lack in Bulgarian adult education, especially compared with other European countries.

Other documents produced by the project are:

- A methodological guide for adult education (*Metodickéno rãkovódstvo za obučénie na vãzrastni*), by Ljubov Popova, Vjara Gjurova, Martin Westphal, Marija Todorova and Radosveta Drakeva. This is a substantial book of about 250 pages. It can be used by teachers and managers who need practical advice, for example on modern methods of teaching adult learners. The manual should be available from the Ministry of Labour and Social Policy.

²⁰ Such key competencies are, according to the strategy: communication in the mother tongue, mathematical literacy and basic competencies in science and technology, information and communication technologies (ICT), learning-to-learn, interpersonal, intercultural and social competencies, entrepreneurship and culture.

- A Bulgarian-English glossary of key terms in the field of vocational education, as an attempt to overcome problems with differing terminology. As participants of the project team report, terminology again was a difficult problem in the discussions especially because international adult education standards and Bulgarian legal terminology sometimes are hard to integrate.²¹
- Several documents in support of those who want to engage in needs assessment for adult education, especially concerning labour market needs. The main document is a booklet with a step-by-step instruction how to conduct a regional labour market study. During the project implementation, several groups of adult education organizers were trained in using the methodology. This manual is an attempt to answer the constant need of more precise labour market data.

3.3.8 Strategy for Craft Trades Training 2006-2008

In a process of discussion with several actors involved in craft trades training, started in 2005, the National Chamber of Craft Trades (*Nacionálna zanajatčijska kámara*, NZK) has issued in 2006 a Strategy to develop training in craft trades,²² with a variety of measures to be taken in 2006-2008. This strategy is presented below in the Section on training in craft trades, from p. 210.

3.3.9 Strategy for Educational Integration of Ethnic Minorities

A relatively new policy document is the *Strategy for Educational Integration of Children and Pupils from Ethnic Minorities*. It was adopted by the Ministry of Education in June 2004 (*Stratégija za obrazovatelna integrácija na decáta i učenícite ot etničeskite malcínstva*).²³ The planned implementation period is 2005 to 2015. This corresponds with the International Decade of Roma Integration. Most of the

²¹ See our remarks in the introduction, p. 18.

²² *Stratégija za razvítie na zanajatčijskoto obučenie, 2006-2008*.

²³ Available at www.minedu.government.bg in the legal acts section (accessed April 9, 2007).

strategy concentrates on schooling for children. But the document also asks for "full adult literacy for illiterate or poorly literate adult Roma".²⁴

3.3.10 Programme for Human Resource Development 2007-2013

One of the most recent documents to adjust Bulgarian social and education policy for the next years is the "Operative Programme for Human Resource Development 2007-2013" (*Operatívna prográma "Razvítie na čovéškite resúrssi" 2007-2013 g.*; Ministry officials use the abbreviation OP "RČR"). This programme is to serve as a framework for using money from the European Social Fund (with co-financing by the Bulgarian state budget) in the years 2007-2013. The overall ("strategic") of the programme is to improve the living standard of people in Bulgaria by development of human resources, high employment rates, higher productivity, access to quality education and lifelong learning, and social inclusion. The programme defines eight priorities. At least three of them concern directly adult education: • Enhancing productivity and adaptability of employees, • Improvement of education and training especially concerning labour market needs • Better access to education and training. But the other priorities as well are related to adult education. For example, the priority "social inclusion" deals chiefly with minorities who have problems to integrate in modern society and modern work conditions; and many measures in this area will rely on adult education and training.

With about 150 pages, this programme is the most detailed of those presented here. The programme has been written in a process of discussion with a variety of governmental and non governmental institutions such as Ministries, Trade Unions, the Association of Municipalities, Universities, the Chamber of Commerce, associations of disabled, etc. Meetings to discuss the programmes were held in summer 2006 in all administrative districts. Over 500 representatives of various groups took part in the discussions.

The programme does not provide any spectacular changes in Bulgarian policy, even not in the education sector. Rather, it can be seen as a sign that Bulgaria more and more integrates into European structures and European policy patterns.

²⁴ Section V.1.9. of the strategy says in Bulgarian: "*Másovo ogramotjávane na negramótni i malogramótni vázrastni romi.*"

One aim of the programme is to give Bulgaria a push, so that it be a competitive member of the EU by 2015.

For those who can read Bulgarian, the first section (introduction) of the paper is a relatively concise and legible outline of Bulgarian social conditions, giving insight into recent (as for 2007) problems of education policy. A draft version of the paper was available (in April 2007) from the website of the Ministry of Labour and Social Policy.²⁵

3.3.11 National Management Unit for Adult Education

Another project funded by Phare and organized under the auspices of the Ministry of Labour and Social Policy started in late 2006. It is called “Development of an Adult Training Centre Network” (BG2004/006-070.01.01). It has two main areas of action: The first area is strengthening the present network of adult education providers in Bulgaria. To this end, several education providers such as CPOs and vocational schools get sums from 50 000 to 200 000 euros either to establish a new training centre or to improve their existing venues, equipment and human resources. Amongst the 18 providers that were awarded in November 2006 are Vocational schools in Sofia, Vidin and Ruse. The *Henry Ford Vocational School for Transportation and Power Engineering* in Sofia, for example, is going to invest in its laboratory for air-condition and refrigeration in order to extend its training capacity.

The second area of action seems more decisive for future conditions of adult education in Bulgaria: The idea is to establish a “National Management Unit” for adult education, attached to the Ministry of Labour and Social Policy. According to the grant scheme, this management unit will have to co-ordinate the activities within the adult education system in Bulgaria, working closely together with the VET Agency (NAPOO). Representatives of the three Bulgarian-German Centres for Vocational Training²⁶ shall participate in the National Management Unit. The unit is planned to have a mandate for four years. After this, a tripartite advisory

²⁵ <http://ef.mlsp.government.bg/bg/getfile.php?id=929> (accessed at 16 April 2007). Current news on the project should be available from <http://ef.mlsp.government.bg/bg/category.php?id=98>.

²⁶ See p. 191

board shall take on the task. The consultancy company White Young Green has been awarded with 700 000 euros to provide technical assistance for design and development of the management unit. This includes training of administrative staff, training of training centres staff, etc., to be delivered within 18 months from end 2006. – The proponents of the programme argue that such a centre is necessary to co-ordinate adult education in Bulgaria. Critics probably would say that this will add just another administrative body to the existing ones.

3.4 Funding

Quality education and training requires appropriate funding, especially in a market economy. The sources of funding that have currently the greatest share in Bulgaria are:

- Public funding from the state budget. This is true for the school system, the *čitálište* cultural centres, a lot of the current programmes to retrain unemployed, etc.
- Funding by European programmes, especially the pre-accession support programme Phare. After Bulgaria's accession to the EU, it now is trying to prepare itself for using European structural funds. Concerning LLL and human resources, the European social fund is of special interest. (A strategy has been set up as a framework for human resource development financed by the European social fund, see p. 160.)
- Private funding through fees paid either by training participants themselves, or by the employers who want to invest in the qualification of their employees. This is especially important for the about 400 Vocational Training Centres (CPO) which have been founded, to a great extent, in order to participate in a growing adult education market. However, since population and employers are not yet very active in continuing education,²⁷ very many CPOs chiefly rely on the retraining programmes of the government.

The authors of the Adult Training Strategy²⁸ issued in late 2006 find that the existing elements of public-private financing should be expanded and improved.

²⁷ See Section 5, "Users of Adult Education", from p. 237.

²⁸ See p. 157.

They recommend to strengthen market elements in adult education. They bring forward that according to experience from other EU countries, it is mechanism of market economy that most effectively lead to quality training.

Further recommendations of the strategy are: ● Employers should be encouraged to invest in human resource development. ● Employees and other individuals should be motivated to use more actively their private funds for training. ● Companies and individuals could be supported by the state through specific legislation regulating training costs. ● A voucher system could be an alternative to direct subsidies for training providers. It provides greater flexibility because the respective client, who has the right to choose the type and form of training as well as the training provider, receives directly money for training from public funds. In this way the voucher system turns into a strong social component of the training system, say the authors of the strategy.

Funding by Phare

Most of the larger projects that aim at improving Bulgarian general education and adult education during recent years were being funded –either completely, or by some kind of co-financing– by the European pre-accession programme Phare.

This Programme of Community aid to the countries of Central and Eastern Europe is the main financial instrument of the pre-accession strategy for the Central and Eastern European countries which had applied for membership of the European Union.²⁹ Since 1994, Phare's tasks have been adapted to the priorities and needs of the individual countries. The revised Phare programme, with a budget of over 10 billion euros for the period 2000-2006 (about 1.5 billion euros per year), has two main priorities, namely institutional and capacity-building and investment financing. Although the Phare programme was originally reserved for the countries of Central and Eastern Europe, it is set to be extended to the applicant countries of the western Balkans.

In Bulgaria, Phare projects are being managed by the Ministry of Labour and Social Policy which has set up a special department “European funds, interna-

²⁹ “PHARE” initially (in 1989) meant: “Poland and Hungary Aid for Reconstruction of the Economies. But since 1994,

tional programmes, and projects” (*Dirékcija Evropéjski Fónдове i meždunaróдни prográmi i proékti*).³⁰ This department has three sections: „Programming, Management, Coordination, and Evaluation“, „Tenders and Contracts“ and “Finance”. This Department has been created in 1999. From 1999 to 2007, this department has managed Phare projects for nearly 115 million euros.³¹ The Phare programme 2005-2006 focuses on human resource development and improving community services.

Phare programmes that have been finished are:³²

- BG2003/004-937.05.03 – Vocational Qualification. – This comprised 1.3 million euros for development of a needs assessment system for vocational training and for development of an adult learning strategy.³³ Another 1.4 million euros were spent for upgrading vocational qualification standards. The overall budget of this Phre project was 3.2 million euros.
- BG0202.03 – Lifelong Learning and Vocational Education and Training – This was used chiefly in order to transform eleven vocational schools into “model schools” with up-to-date equipment. Additionally, there were several modules of continuing education for teachers. For example, 200 teachers were trained in interactive teaching methods, and another 100 in IT, each course lasting two weeks. There was also a training module for schools directors, focusing on how to strategically develop a vocational school according to market needs. The overall budget was 5.3 million euros, 4 of which from Phare, and 1.3 from the Bulgarian state budget.
- BG0102.06 – Social Integration – This project focussed on the Roma minority in Bulgaria. The idea was to create twelve “Roma Culture Information Centres”, to organise literacy courses for a total of 4500 adult illiterates, and to offer additional courses for vocational qualification and entrepreneurship skills.³⁴

³⁰ It has an own website which gives right useful information on past and current Phare projects, <http://ef.mlsp.government.bg> (accessed in April 2007)

³¹ Human Resource Development Operative Programme (February 2007), p. 58. - In what follows: HRDOP.

³² As for April 2007. Only most recent projects are mentioned.

³³ See the strategy description from p. 157.

³⁴ The available project documentation did not provide information when this project was run, and we had no time to check this in detail with the responsible officials (April 2007).

- BG0102.05 – Labour Market Initiatives – This project intended to fight unemployment especially of disadvantaged such as long term unemployed, women, youngsters, minority groups, etc. The idea was especially to motivate them to more actively participate in the labour market, and to adapt to labour market needs. The project was planned to provide a bundle of initiatives such as qualification programmes, internship programmes, support businesses to create job opportunities for disadvantaged etc. One component was just to refurbish several vocational schools. Other activities concentrated on entrepreneurship skills for unemployed. The overall budget was 8.3 million euros, 6.3 of which by Phare, 2.0 by the Bulgarian state budget. The project was to be run from January 2002 to December 2004.

Phare programmes, concerning adult education or adult education policy in Bulgaria, that have not been finished (as for April 2007):

- BG 2006/018-343.10.01 – Human Resource Development and Employment Promotion, Phase 3. (7.9 million euros).
- BG 2005/017-353.10.01 – The same, Phase 2.
- BG 2005/016-353.10.01 – The same, Phase 1.
- BG2004/006-070.05.01 – Labour Market Integration of Ethnic Minority Groups
- BG2004/006-070.05.01 – Alternative Employment.
- BG2003/004-937.05.02 – National Data Base for the Labour Market and the European Social Fund.
- BG 0202.01 – Employment Promotion for Youngsters. A scheme to support capacity and co-operation on a local level. (8 million euros, of which 6 million by Phare).

Projects in the field of adult education, financed by other donors

- Project “Bulgarian-German Centres for Vocational Education“ in the towns of Stara Zagora, Pazardžik and Pleven; by the Federal Republic of Germany. Now continued with two more centres for tourism occupations (see p. 191).
- Programme “Quick start” (*Bărz start*) for inservice vocational education of workers; by USAID.
- Project „Vocational Education“ in the framework of the Programme for co-operation of the Bulgarian Ministry of Labour and Social Policy and the French Ministry of Employment and Solidarity”, in 2002.

- Project „Strategy and politics of vocational education and training“; by the *Organisation internationale de la francophonie*, Paris; with participation of Kanada, several European countries and Mauritius.
- Project “Regional network for economical education in schools”; by the Stability Pact for South Eastern Europe.
- Project “Erwachsenenbildung in Südosteuropa (INEBIS)”, implemented by *dvv international*, chiefly with German Federal Funding.
- Project “Tourism Education and Training in South Eastern Europe - economical education, national networks and cross-border-co-operation”, by the Stability Pact for South Eastern Europe.

Civic education , which is an important sector of adult education, has been financed in recent years exclusively by extern donors.

3.5 Authorities and Institutions Involved

3.5.1 Council of Ministers

The Council of Ministers, as the most eminent structure of the government, is the leading institution in the field of education and employment policy, as in other policy areas. In practice, mayor documents such as the policy strategies (for instance to combat poverty, to develop adult education and vocational training, etc.) are adopted by this body.

3.5.2 Ministry of Education and Science

The Ministry of Education and Science (*Ministérstvo na obrazovániето i naúkata*, MON) is involved in drawing up the policy guidelines for vocational training, and should coordinate implementation of these. It issues orders and prescribes appropriate methods for the formal education system (Vocational schools, Vocational *gimnázii*, Vocational colleges and institutions of higher education).³⁵ The Minister of Education approves the national training requirements for the four

³⁵ However, Art Schools and the shortly created category of Culture schools are managed and funded by the Ministry of Culture, and schools for agriculturalists by the Ministry of Agriculture.

levels of vocational training and the list of training occupations drawn up by subordinate agencies (chiefly the National Agency for Vocational Education and Training). These apply to students in both the formal and the non-formal education and training system.

The Ministry of Education monitors the work of national and local government schools, approves their syllabuses and sets the admission criteria for Vocational schools, Vocational *gimnázii* and Vocational colleges. The Ministry administers centrally the funding of state schools (and the vocational training that takes place in them). In doing so it uses a table of costs per pupil. We have already alluded to the problems associated with this.

3.5.3 Ministry of Labour and Social Policy

In the field of adult education, the Ministry of Labour and Social Policy (*Ministérstvo za sociálnata politika i trudá*) is responsible for the vocational training of the employed and the unemployed. It draws up an annual “National Employment Plan” (*Nacionálen plan za déjstvie po zaetosttá*). According to the “National Continuing Vocational Education and Training Strategy 2005-2010” (*Nacionálna stratégija za prodálžávaštoto profesionálno obrazovánie i obučénie 2005-2010*) adopted in 2004, the Ministry of Social Policy is responsible for establishing vocational training needs by analysing the labour market. The Ministry of Social Policy is also involved in updating the official list of training occupations. An important function of the Ministry is to manage the projects that are financed by Phare (see above. p. 163).

3.5.4 Employment Agency

The Bulgarian Employment Agency (*Agéncija po zaetosttá*) and its subordinate local branches, the employment offices (*bjurá po trudá*, singular: *bjuró po trudá*), is an agency of the Ministry of Labour and Social Policy. It is responsible for employment promotion, supervision of the labour market, occupational advice, and education and training for the unemployed and those in employment (vocational training and motivational measures). The Agency’s units are 9 regional head offices, called *Regionalna služba po zaetosttá*, advising 109 Employment offices

(called *Dirékcija "bjuró po trudá"*) with a total of 180 individual offices (numbers for 2007).

The employment offices play the main role in vocational training for the unemployed by commissioning courses from local education and training providers, which they also fund.

According to information from the Employment Agency, over 38 000 unemployed took part in 2003 in courses (*kvalifikációnni kúrsove*) which the Agency had arranged. This represented 7.6 per cent of the total number of persons registered as unemployed. The majority of the courses led to a further qualification (67 per cent), while the rest aimed at an initial vocational qualification. In 2004 the number was about 32 000, and in 2006 about 42 000. (For details on the various programmes managed by the Employment Agency see Section 4.9 from p. 218.)

The programmes run by the Employment Agency are funded by the Ministry of Social Policy and Labour, in compliance with the "National Employment Action Plan" (*Plan za déjstvie po zaetosttá*) that has been issued regularly for several years now.

3.5.5 National Agency for Vocational Education and Training (NAPOO)

The National Agency for Vocational Education and Training (NAPOO)³⁶, was set up in 2000. The legal framework was provided by the relevant provisions of the 1999 Vocational Training Act (ZPOO).³⁷ The National Agency for Vocational Education and Training is a specialist body directly subject to the Council of Ministers. It is intended to coordinate the work of the institutions concerned with vocational training and occupational guidance. Representatives of the Ministries, employers and the trade unions are involved as equal partners in its management.

The activity of NAPOO most visible to outsiders is the licensing of the new "vocational training centres" (*Céntár za profesionálno obučenje*, CPO). This new legal entity was introduced by the 1999 Vocational Training Act, and there are now (April 2007) 420 such licensed vocational training centres (CPOs).³⁸ They are

³⁶ *Nacionálna agéncija za profesionálno obrazovanie i obučenje*

³⁷ Part 6, s 41-50.

³⁸ In May 2005 the number was 245, in April 2006: 317.

often older establishments which applied for approval under the new rules in order to take advantage of the consequent benefits. (For more details see p. 185 ff.) The Agency is also responsible for monitoring the quality of the licensed vocational training centres (CPOs) and may if necessary withdraw their licence.

The Agency has the further task of drawing up the national training standards (*dържавни образователни изисквания*, DOI) for vocational training. For each occupation these standards lay down: admission requirements, profile of activity, training objectives, content of training, certification requirements, norms for the equipping of training premises, and norms for the qualifications of teachers. In defining these training standards, NAPOO relies on expert commissions composed of three representatives of the relevant sector of the economy from Ministries, employers and the trade unions. These expert commissions also play a part in compiling the official list of training occupations drawn up by NAPOO. This list has been in existence since 2001. It is aligned with the International Standard Classification of Education (ISCED 97)³⁹ and the classification “Fields of Education and Training” of Eurostat, 1999. The list is binding on all institutions providing vocational training.

NAPOO also fulfils some other functions to do with vocational training. It works out criteria for the procedure of granting licences. It carries out studies of vocational training and occupational guidance. It is involved in the creation of a system for awarding certificates of vocational training. It is concerned (together with other bodies) with the international recognition of the various documents relating to vocational training and occupational guidance. The agency also maintains the register of vocational training and occupational information centres, which is accessible via the Agency’s website⁴⁰, where the exact wording of every licence can be consulted by anyone. In particular, it can be seen at a glance how many licensed CPOs there are, and for which occupations they are permitted to provide training.

³⁹ At the same time, the requirements of the Bulgarian list of occupations (*Nacionálna klasifikácija na profesijite*, NKP) and of ISCO 88 (International Standard Classification of Occupations) are taken into account.

⁴⁰ www.navet.government.bg – most easily via „*karta na sajta*“ (site map).

3.5.6 National Pedagogic Centre

The National Pedagogic Centre (*Nacionálen pedagogíčeski centăr, NPC*)⁴¹ is an institution belonging to the Ministry of Education and Science. It has a central office in Sofia with a staff of 6, and regional offices in the capitals of the provinces with 2 to 4 staff members, thus overall staff of about 70 (as for 2007). The centre has been working in this form since 2005. It was created in order to co-ordinate the work of its regional branches which had been existing previously. The task of the NPC is to pedagogically support pupils, teachers and parents by a) qualification of teachers and educators b) prevention of pupils failing to stay in school c) providing consultation and orientation on vocations and vocational education opportunities. The NPC organizes qualification programmes for teachers, including teachers of professional education institutions. The centres provide as well occupational information for pupils, students and teachers.

3.5.7 Local Authorities

Under the terms of the Vocational Training Act (ZPOO), local authorities are to be involved in framing vocational training policy by passing on information about the demand for workers in their areas so that the national training plan (*plan-priém*) can be updated. This means that the local authorities provide information about how many young people in what jobs will be needed in the immediate future in the municipalities themselves, in enterprises belonging to the local authorities, and in the regional economy as a whole. Plans are then drawn up for the numbers of students in each subject in vocational schools and colleges within the area of the local authority in question.⁴²

Local authorities also play a part in occupational guidance for school pupils, the unemployed and others. Furthermore, they are responsible in principle for funding vocational schools and colleges belonging to them. In practice this is of no great

⁴¹ See its website: <http://npc-bg.com>

⁴² The latest plan for the admission of students to vocational schools, showing numbers in each subject area in each school, can be consulted on the Ministry of Education website: www.minedu.government.bg

significance since out of the 500 vocational schools and colleges in the country,⁴³ only about a dozen belong to local authorities (2004 / 2005 figures). The bulk of vocational schools and colleges are directly subject to the Ministry of Education or other Ministries.

The current wide range reform of the Bulgarian education system might change the role of local authorities essentially. A reform programme for school education has been published by the Bulgarian government early in 2006. (We present the contents of the reform programme in section 2.10, from p. 114.) Accordingly to the reform programme local communities shall have much more influence on questions as how many schools, what kind of schools, what kind of courses etc., including school funding. In General, decision making in the school system shall be decentralized: regional authorities, municipalities and even teachers and parents shall participate and shall have competences even concerning the budget. It is, however, not sure to what extent the reform programme will be really implemented. The reform programme itself provides a time window of ten years (2006-2015) for the change of the whole system.

3.5.8 Other Institutions

A series of **councils and commissions** answerable to the Ministry of Labour and Social Policy have additional functions in the regulation of vocational training, such as the National Council for the Vocational Training of Workers (*Nacionálen sávéť za profesionálna kvalifikácija na rabótnata síla*), whose role is to coordinate policy in the area of education and vocational skills training for the unemployed and those in employment.

The **Regional Employment Commissions** (*Regionálni komísii po zaétost*) work out employment plans at regional level. These plans also cover vocational training for the unemployed and those in employment. The regional employment plans are then combined into the national employment plan and submitted to the Ministry of Labour and Social Policy for approval.

⁴³ Vocational schools, Vocational gimnázii, Art schools and Vocational colleges, see Appendix Table 5.

A National Centre for Occupational Development (*Nacionálen céntár za profesionáлно razvítie*) was set up in July 2004. It is subject to the Ministry of Labour and Social Policy. One of the purposes of the Centre is to provide training courses for the design and management of projects funded out of the European Social Fund. Another of its tasks is to analyse the need for training and to work out vocational training programmes. The Centre is also intended to provide courses for administrative staff on the implementation of social policy and vocational training for those in employment and the unemployed.

A National Higher Education Accreditation Agency (NAOA)⁴⁴ was set up in 1995 under the terms of the Higher Education Act, directly answerable to the Council of Ministers. Its role is to accredit higher education institutions, and to monitor and evaluate their work (and to withdraw accreditation in cases of doubt). This applies to all institutions awarding Bachelor's, Master's and doctoral degrees as well as the title "specialist", and to courses offered by these institutions not leading to such qualifications. Accreditation is granted for each individual course. Under the latest regulations for implementation of the Act (Official Gazette of 1 March 2005),⁴⁵ the Agency employs 46 staff. The most important arm of the Agency is the Accreditation Council. Since the Agency was set up, this has been completely restructured several times. Originally there were 23 representatives of higher education institutions, the Bulgarian Academy of Sciences (BAN) and the Ministry of Education and Science, but this number was later reduced. The latest implementation regulations provide for ten members, who must have advanced doctorates and are appointed by the Government. The Agency publishes a list of accreditations on its website, but the official announcements in the Government's Official Gazette (*Dǎržáven véstnik*) are more reliable.

The **National Institute of Education** (*Nacionálen institút po obrazovániето*, NIO) is not any more a player in the Bulgarian education system. In April 2005 the Ministry of Education announced that the Institute was to close and declared that it would itself take over its work. An attempt to take the case to court had no success, and the institute indeed was closed later in 2005. The NIO was an institutions with quite a tradition in Bulgaria. Its last re-shaping had occurred in 1996, but the institute in fact had continued the work of its predecessors, the first of

⁴⁴ *Nacionálna agéncija za ocenjávane i akreditácija*; www.neaa.government.bg.

⁴⁵ As at May 2005.

which was established in 1936. The tasks of the Institute included research, collection and analysis of information about the education system, specialist advice to the Ministry, inservice training for educationists, maintaining a library, and publishing. In its last design, the institute had the following sections: • Centre for General Middle Education (*Céntăr po óbštó srédno obrazovănie*), responsible for the stages of education from pre-school to middle (upper secondary) education (*srédno obrazovănie*); it was also drawing up the regulations governing the (new) centralized upper secondary leaving examination. • Centre for Vocational Education and Occupational Guidance (*Céntăr po profesionălnó obrazovănie i profesionălnó orientírane*). • Centre for Higher Education (*Céntăr po visše obrazovănie*), since 1998, supposed to accredit higher education institutions (universities, specialist institutes of higher education, etc.), monitor quality, particularly in association with the change-over to European standards, and to organise teacher training. • Centre for Educational Economics and Administration (*Céntăr po ikonomika i upravlénie v obrazovăniето*), since 2000, the main task of which was to introduce better management into schools and other educational establishments. • Centre for Information and Analysis (*Informacióнно-analitičen céntăr*) • Publishing Centre and Library (*Céntăr za izdătelska déjnost i bibliotéka*), which was to publish books and journals about education policy, methodology, etc., and collect Bulgarian and foreign specialist literature.

Conclusion. Overall, the impression is that Parliament and Ministries have set up numerous commissions and other bodies which find it hard to cooperate because some of their tasks overlap. The most important and the most active body at the moment is the National Agency for Vocational Education and Training NAPOO, which issues the licences for providers of vocational training in the free market.

3.6 Needs Assessment

For an adult education system that is to support economic and social development, it is vital to know what skills are needed for the labour market at national, regional and local level. Needs assessment, however, has remained one of the unsolved problems in Bulgarian adult education. Adult education institutions at the moment do not receive enough data –or enough reliable data– on developments at the labour market, in the school system and the universities. Only few of the adult education providers are able to conduct their own needs assessment.

There are, of course, several state institutions that collect data. The National Statistics Institute (NSI) surveys the labour market and the education system permanently, using the standards of the European Statistics Office Eurostat. Other surveys, for example on vocational training in enterprises, are conducted at intervals, mostly in unison with overall European surveys. However, for the needs of an adult education market, the statistics often come late.

The Ministry of Education and Science issues every year a plan that defines how many students in which vocations will be taught in the vocational schools (*dържавен план-прием за професионалното образование*). To this end, the Ministry of Education and Science is supposed to use and interpret labour market data. It collects further data from the municipalities. However, there are much complaints on the quality of decision making in the Ministry. A typical problem is that vocational schools had been founded, during socialism, according to the needs of local industries. When there was, for example, a factory that produced car tyres, a school specialised in rubber processing was added. After 1989 a lot of industries just were shut down, but the schools remained as it was, and the Ministry continues, for several reasons, assigning pupils to the school, without any chance that they would find an employer specialised in car tyres afterwards.

The Employment Agency (*Агенција по заетостта*) with its 180 branch offices is another data collecting institution. For several years now, the Employment Agency assesses training needs at a national and a regional level. This information is collected by a direct survey of employers, but in the opinion of many experts, even of the National Statistics Institute, it is incomplete and inadequate. One problem is that employers have no tradition of a dialogue with the education and training institutions.⁴⁶ This makes it difficult to establish what their needs and plans are.

Another, more complex problem is, that whatever data might be collected, they often tend to be rather misleading. A very good example are data on average wages in Bulgaria. The National Statistics Institute collects very thoroughly data on wages and salaries, based on the labour contracts signed between employers and employees. But everybody knows that a huge share of labour contracts are signed using the minimal wage that is guaranteed by the law, while the employers give

⁴⁶ For more detail see p. 193.

considerable sums additionally in cash, this time without paying taxes or social security contributions. Legal minimal wage was 150 leva (75 euro) in 2005 and 160 leva (80 euro) in 2007. In contrast, additional cash can be several hundred leva, at least in Sofia. So, what do statistics concerning average wages really tell? It is right clear, that such tremendously distorted statistics do not help make a meaningful analyse the labour market, or a training needs assessment that is relevant for course providers.

A third problem is that data collection on labour market and training needs is not well co-ordinated. All experts in the area call for a joint effort of all institutions involved, to unify and co-ordinate the needs assessment activities. This would be, at least, the Ministry of Education and Science, the Ministry of Labour and Social Policy, the Employment Agency, the Statistics Office, the Employers' Unions and Chambers, the Trade Unions and the training providers. All policy papers, strategies and action plans that have been set up in that area during recent years, ask for such a concerted action, e. g. the "Employment Strategy 2004-2010" and the "Continuing Education and Training Strategy for 2005-2010".⁴⁷ Most recently (in late 2006) the authors of the "Adult Training Strategy 2007-2013" asked for a better needs assessment for adult education.⁴⁸ In Priority 2 ("Improving the response of adult training to the labour market"), they planned an activity "Developing and implementing a system of adult training needs analysis", showing that in their opinion the current means of needs assessment are not satisfactory. As a result of this activity, they expect "long-, mid-, and short-term analyses, prognoses and plans for adult training needs."

Developing an adult training strategy was one of two tasks if the project. The second was to "develop a system for studying, identifying and monitoring of the employers' and employees needs for vocational training" (text of the EU grant), and to create methodological tools for training needs analysis. The resulting methodology was then to be tested in selected regions, as a pilot survey. Several seminars were held during the project, with participants from all the aforesaid institutions, in order to disseminate the methodology. According to the instruction brochure that was one of the outcomes of the project,⁴⁹ the employment agencies

⁴⁷ This strategy is described more fully from page 155.

⁴⁸ See the strategy description from p. 157 and the list of its priorities, from p. 326.

⁴⁹ Find more information about this brochure on p. 159 of this book.

and the education providers were supposed to launch their own needs assessments, on a local or regional level, using the questionnaires that were published in the brochure. However, not all experts are convinced that this is a sufficient incentive to launch, in the long term, a better co-ordination of training needs assessment.

4 Providers of Non-formal Adult Education

According to the standard definition, non-formal education covers the acquisition of new knowledge and skills *outside* the programmes of the formal education and training system. It takes place through targeted courses, conferences, seminars, inservice training, private tuition and other forms of learning in which a teacher, tutor or instructor is involved.

Providers of such courses in Bulgaria are both public educational institutions such as vocational schools and universities, and private institutions such as Vocational Training Centres (CPOs), language or computer schools, employers and associations / organizations¹ concerned with education in general, and more particularly with vocational education.

The number of courses teaching occupational skills (computing, languages, technical studies, etc.) has risen sharply in the last few years, at first through an almost totally unregulated free market immediately after the change of regime, and more recently under the supervision of the National Agency for Vocational Education and Training NAPOO. The Sakskoburggotski Government (2001-2005) introduced a range of state training and retraining programmes to combat unemployment. Since then, every year roughly 40 000 to 50 000 people (most of them unemployed) have been taking part in vocational training courses.²

Political education, which is also part of non-formal education, has been conducted in recent years exclusively with the help of foreign project funding. It is, therefore, not widespread. An attempt to discuss political and cultural adult education, which is certainly of great social importance, would meet with the difficulty that information is hard to come by. Such types of education, so far they exist, are provided by individual initiatives that are often small or informal. There are examples such as discussion circles for Linux users and enthusiasts (a subject that is certainly pertinent to politics and the economy); courses for leaders of charity groups organized by individual religiously inspired people rather than by the Orthodox Church itself; seminars on the importance of social commitment; training courses provided by foundations and other civil society initiatives, often supported

¹ See p. 300 for an explanation on Bulgarian legislation on voluntary associations and the problems of terminology associated with it.

² These programmes are presented below in detail, see Section 4.9 from p. 218.

by international or EU programmes, etc. However, it would take considerable time and trouble to arrive at a complete picture of these. However, in order not to ignore the topic completely, we shall describe four such initiatives by way of illustration (below, sections 4.10.3, from p. 226). Similarly, only general information is currently available about the activities of the *čítališče* cultural centres, which will nonetheless be described quite thoroughly here (in section 4.8) because they have considerable potential to develop into the primary providers of adult education, once Bulgaria has joined the EU.

In the sections that follow, the different types of institutions providing non-formal adult education in Bulgaria will be described in greater detail.

4.1 Vocational *Gimnázii*, Vocational Schools and Vocational Colleges

Continuing vocational training has been provided by Vocational *gimnázii* (*profesionální gimnázii*), Vocational schools (*profesionální učilišta*) and Vocational colleges (*profesionální koléži*) since 2003 under the terms of the Vocational Training Act.³ Before that it had only been offered by such establishments in isolated cases.

According to data provided by the Ministry of Education and Science, 179 Vocational *gimnázii*, Vocational schools and Vocational colleges (of a total of around 500 such schools) provided continuing vocational training courses for adults in 2003. That means that it was possible to take an VET Level 3 or 4⁴ vocational training course in one out of three vocational schools and colleges (Vocational *gimnázii*, Vocational schools and Vocational colleges) in the formal education system. The total number of participants in vocational training courses in Vocational *gimnázii*, Vocational schools and Vocational colleges was 14 100 in the school year 2003/2004. Most students were enrolled in courses for seamstresses (around 2300), building workers (around 2000) and chefs and waiters (around 1800). However, there was considerable variation between the different administrative regions of Bulgaria. In the regions with a high rate of unemployment, the proportion of schools and colleges offering continuing vocational training was

³ See section 2.2.3, from p. 65).

⁴ Of the National VET Level system, see p. 67.

lower than in the regions with low unemployment. In the fourth quarter of 2003, for example, half the vocational training establishments in the Tărgoviște region, which had an unemployment rate of 30 per cent, were also offering continuing vocational training. In the Kărdžali region, in the southeast of Bulgaria, where unemployment was relatively low, 5.8 per cent, continuing vocational training courses were available at the same time in most schools (83 per cent). One reason for this might have been that the employment office in Kărdžali was more active, since local employment offices are the principal sponsors of vocational training, providing the funding out of national programmes. In the north-eastern Silistra region, not a single school was offering continuing vocational training.

Table 4.1

VET degree students in courses offered by Vocational <i>gimnázii</i> , Vocational schools and Vocational colleges in 2006 (outside their activity as traditional schools) ⁵						
	Enrolments			Degrees attained		
	Total	Men	Women	Total	Men	Women
VET Level 1	333	104	229	302	74	228
of which in private institutions	150	5	145	150	5	145
VET Level 2	181	90	91	227	71	156
of which in private institutions	52	6	46	108	5	103
VET Level 3	809	642	167	531	336	195
of which in private institutions	9	0	9	19	0	19

Table 4.1 shows data for 2006 on enrolments in courses leading to a vocational qualification (VET Level 1, 2 or 3 of the national system), provided either by Vocational *gimnázii* and Vocational colleges. Nota bene, this data, as all data presented in this section, does not deal with regular students (i.e. students of regular school age, completing their school education in one of the vocational schools).

⁵ The table shows yet unpublished data of the NSI (April 2007). A similar table on data for 2005 is published in NSI *obrazovanie* 2006, p. 69. Numbers there are slightly smaller, showing that this section of adult education is developing.

Rather, it deals with (adult) students who attend adult education programmes outside the regular schools system. Typically, the participants are of working age, and the courses must be paid for (whereas in the traditional schools system students are of school age and education is for free). In other words, the table shows the recent activity of Vocational schools, Vocational *gimnázii* and Vocational colleges at the free education market.

Compared with the numbers of enrolments and issued degrees in CPOs, the activity of school type institutions at the free market is relatively low. According to the NSI data, in 2006 CPO issued about 4900 VET Level 1 certificates, 4000 VET Level 2 certificates and about 1800 VET Level 3 certificates (see the Table 4.2 below on p. 189), whereas the number of certificates issued by school type institutions was 303, 227 and 531.⁶

Continuing vocational training was only introduced into the schools in the formal education system a few years ago, and there have only been statistics on it since 2003. In previous years there were some schools that offered continuing vocational training, but these were isolated cases. Continuing vocational training is still being built up in schools, and faces a number of difficulties, principally because of shortage of relevant experience. The greatest problems in recent years have been as follows:

- **Demotivating budgeting policy.** The rules for the funding of continuing vocational training in the state school system have a negative impact. Schools cannot decide for themselves how to use the income from continuing vocational training but have to pass this on to the Ministry of Education and Science. (However, the Ministry is trying to solve this problem, see for instance the plans for delegated budgets, as described in the Education Reform Programme for 2006-2015.⁷)
- **Heterogeneous classes.** There are no rules for the selection of students and the formation of classes. Many course participants are sent to the school by the employment office to take part in continuing education and training. In one and the same course, therefore, there are people with differing levels of previous

⁶ This is yet unpublished data, provided by the responsible department of the NSI especially for this book.

⁷ See p. 125

education and of motivation. Learning in these groups is generally ineffective since the opportunities which heterogeneous classes could offer are not exploited.

- **Lack of motivation among participants.** Some participants do not really want to acquire new knowledge and skills but are more interested in the training allowances paid by the employment offices.
- **Poor level of teaching.** Teachers are frequently not up to date with their subjects, especially when compared with European or international competitors. In general, there are not enough opportunities of inservice training to familiarize them with modern techniques, materials and production standards.⁸ The School Education Reform Programme for which has passed the Parliament in June 2006, asks for more continuing training for teachers, but this claim is quite unconcretely even in the reform programme (see p. 132), and results of concrete reform steps are to be waited for, yet.
- **Outdated equipment.** Physical conditions in schools scarcely make it possible to provide training using modern methods, equipment and techniques in technology-intensive occupations.

4.2 Institutions of Higher Education

Important steps have already been taken towards adopting the notion of *lifelong learning* in Bulgarian higher education institutions. Most Bulgarian universities provide adult education (i.e. educational provision outside the conventional sequence of school-university-employment) in various forms, for example correspondence courses⁹ or special postgraduate courses.

One widespread form of continuing education is attendance at courses provided by the universities for people who have, for example, already been in employment

⁸ Concerning how to use a computer, there was run, however, in 2005-2007, a training programme in order to introduce about 90 000 teachers into use of IT in the classroom. Teaching is carried out by selected colleagues who are ahead with computers. Accordingly to the "National Strategy for Introduction of IT in Bulgarian schools", during the three years programme there will be spent about 8 million Euro for teacher training in IT use.

⁹ Even leading to Bachelor's or Master's degrees, but this must be counted then as belong to formal education, not to non-formal education which this Chapter deals with.

after finishing a first degree. This form of continuing education is generally known as specialization (*specializácija*) or postgraduate training (*sléddiplomna kvalifikácija*), both terms frequently being used in practice to mean the same thing. Sometimes, however, a distinction is made between *specializácija* as applied especially to specialist training for medical practitioners, and *sléddiplomna kvalifikácija*, the broader term which covers both this form of *specializácija* and all kinds of other shorter continuing education and training courses for a variety of other occupations.

Under the terms of the Higher Education Act (s. 66), there are three types of learner at Bulgarian higher education institutions: students (in courses leading to Bachelor's and Master's degrees and the title of "specialist"), doctoral students (studying for a doctorate) and *specializánti*, those taking part in specialization courses following a set syllabus but not leading to a degree qualification.

Those participating in postgraduate training (*sléddiplomna kvalifikácija*) will have completed initial higher education, are usually already in employment and are attending further courses at a university, often at the behest of their employer. The scope of these courses varies from case to case, so that they are sometimes akin to inservice training and sometimes more like a full continuation course.

Postgraduate training is well developed for medical practitioners, although this lies in the nature of the profession. They can take four-year courses to train as specialists in surgery, paediatrics, internal medicine, neurology, psychiatry, etc. There are also short (five to ten-day) and medium-term (ten to 30-day) courses in all branches of medicine.

The courses for medical practitioners are generally paid for by the state. The costs of courses in other subjects are usually borne by employers, and occasionally by learners themselves.

Examples

Since there is no systematic information about education and training provision for higher education graduates, no clear picture can be given at the present time (2006) of adult education at universities without extensive individual research. Some universities provide narrowly subject-based courses to expand and update knowledge and skills already acquired, while others offer a wide range of courses

for the general public. A few examples of adult education provision at universities are described below from information supplied by the institutions in question.

A “European Centre for Lifelong Learning” (*Evropéjski centър “Obučenie prez celija život”*) has been set up at the “**Černorizec Chrabăr**” **Free University in Varna**. This aims at following the common education policy of EU states, and in particular at teaching skills such as adaptability, entrepreneurial spirit and flexibility. Those completing courses at the Centre should be able to react dynamically to the changing needs of the labour market. The Centre offers a variety of initial training, skills training and retraining options and courses to update knowledge and skills previously acquired. Other services such as research, advice and marketing are also offered.¹⁰

The “Saint Ivan of Rila” University of Mining in Sofia¹¹ established a Continuing Training Centre (*Kompléksen centър za obučenie i kvalifikacija*, KCOK) some years ago. It has several departments including “Training for Bulgarian Citizens”, “Training for Foreigners”, “Distance Education” and “Doctoral and Specialization Support”.

The “Training for Bulgarian Citizens” department offers continuing training intended to help university graduates adapt to the changing social and economic environment in the country. Some of the first students after 1991 were teachers in Vocational schools (then known as *téxnikumi*) who needed to respond to new demands.

The Centre offers courses of varying length (up to four semesters, i.e. two years, or shorter), some of which are of a general nature, such as commercial economics, education, shorthand and foreign languages, and some in specific aspects of mining, such as blasting, Geographical Information Systems (GIS) and Global Positioning Systems (GPS).

According to an activity report of 2003, around 2700 people took part in post-graduate and continuing training courses at the University of Mining between 1992 and 2002. The significance of this figure is reduced somewhat by the various organizational reforms at the University. KCOK has only existed de jure since

¹⁰ See the Centre’s website at www.vfu.bg/bg/in.php?unit=III.

¹¹ *Mínno-geolóžki universitét „Sv. Iván Rilski”*, www.mgu.bg.

1999, but other units of the University were doing much of the same work earlier.¹²

The private “**New Bulgarian University**” in Sofia (NBU)¹³ has a Continuing Education Centre (*Céntăr za prodāžāvašto obučenje*) offering courses for a variety of age groups. Provision ranges from skills training and retraining for adults, via the acquisition of new knowledge and skills and updating of occupational skills, to cultural continuing education. The Centre aims to respond flexibly to modern education and training needs and to specific occupational demands. Participants in initial vocational training courses are also given preparation to enable them to change jobs in response to changes in the labour market, to set up their own businesses, or for the purpose of personal development. Depending on the course, the admission requirement is satisfactory completion of either upper secondary or tertiary education. There are courses in information technology, management of small and medium-sized enterprises, accountancy, finance, etc.¹⁴

The Institute of Continuing Education (*Institút za slédiplojna kvalifikācija*) of the **University of Economics** in Sofia (UNSS)¹⁵ provides continuing education and training for Bulgarian and foreign higher education graduates, with a wide range of courses on economics, law and public administration. In addition, the Institute is licensed to provide training for the unemployed. Besides teaching, it is also engaged in publishing and consultancy.¹⁶

The largest higher education institution in Bulgaria, “**Saint Kliment of Ochrid**” **Sofia University** (SU), offers postgraduate courses in fields such as education, humanities, mathematics, information technology, history and philosophy. As is usual with such provision, postgraduate courses are fee-paying, although practice shows that the costs are often borne by employers. The subject-matter of the courses is determined by the relevant faculty, but the content can be adapted to suit the wishes of the client.

According to its own figures, Sofia University organized a total of 34 postgraduate courses in the academic year 2002/2003, and 129 “individual training courses” of

¹² http://annual.mgu.bg/2003/bg/svityk4/dokladi_pdf/SHALAManova-all_bg.pdf

¹³ *Nov bālgarski universitēt*, www.nbu.bg.

¹⁴ <http://www2.nbu.bg/sce/>

¹⁵ *Universitēt za nacionālna i svetōvno stopānstvo*, www.unwe.acad.bg

¹⁶ www.ips.bg

private one-to-one tuition with a member of the teaching staff, paid for by the learner. There were just over 700 participants in postgraduate courses in the academic year 2002/2003, around 180 of them in education, around 150 in mathematics and information technology, and around 120 in philology. In the last four years, the University has had a total of 2800 course participants. Completion of an initial higher education degree is a condition of admission.

Summary. These examples demonstrate that higher education institutions are already attempting to move into the area of continuing education and training. One motivation for this is to earn extra money. But higher education institutions have not yet exhausted their potential in this direction.

4.3 Licensed Vocational Training Centres (CPOs)

“Vocational training centres” (*Céntăr za profesionálno obučenie*, CPOs) are a new feature of the Bulgarian education and training market. The legal framework for them was created by the passing of the Vocational Education and Training Act in 1999 (ZPOO, specifically s. 22).¹⁷ This arose out of the political desire to regulate the growing number of private training establishments, and to impose quality standards in particular.

Antecedents. Even before the change of political regime in the early 1990s, there were “vocational training centres” in Bulgaria in the form of so-called “vocational teaching centres” (PUCs).¹⁸ Most PUCs were attached to the larger enterprises. They usually provided various forms of skills training.¹⁹ In retrospect, education experts in Bulgaria think that the quality of the PUCs generally left much to be desired, although there were positive exceptions. After 1989 they were shut very swiftly as the planned economy collapsed and state enterprises closed down.

¹⁷ *Zakón za profesionálnoto obrazovanie i obučenie*, see p. 65.

¹⁸ *Profesionálen učeben céntăr*. They are generally referred to in the plural as “PUCove”, pronounced “pútsove”.

¹⁹ In our interviews, some experts recalled that it was even possible to study for formal levels of education, especially middle education (*srédno obrazovanie*). Others did not agree with this. So, in every case, this must have been an exception.

At the same time Bulgaria suddenly faced what had until then been a totally unknown problem: unemployment. As a result, many different forms of education and training rapidly appeared on what was now a free education market, at first largely in computing and foreign languages, and later also for complete job training, especially in services, catering and business. These private training providers did not need a government licence but were merely registered. They could not issue their learners with certificates at the end of courses, so that learners had to go to a state Vocational school or Vocational *gimnázija* and sit an examination there.

The private courses themselves were often of poor quality. The equipment and teaching staff were frequently unsuitable. Stories circulate about Vocational colleges of the more dubious kind being run from private flats, where the teaching was done by somebody's father or great-aunt. But there were professionally run institutes as well.

Eventually there were about 500 registered providers of vocational education and training nationwide, with no quality control. The 1999 Vocational Education and Training Act (ZPOO) was intended to change this situation. It defined the right for independent providers to conduct vocational education and training leading to specific qualifications when they register as a **Vocational Training centre (CPO)** with the new National Agency for Vocational Education and Training (NAPOO) which would control the capacity of the new training providers.

This led to an immediate run for licences. The first vocational training centres (CPOs) were approved in 2003. By May 2005, 245 licences had been issued. In July 2006 their number reached 340, and in April 2007 over 420. A large number of the current licensed CPOs were existing establishments, companies, training centres, voluntary associations, etc., and even include some state schools and colleges. The traditional Vocational schools, Vocational *gimnázii*, etc., of course do not need a CPO licence to continue their regular work. But they can apply for one, if they wanted to cash in on state training programmes for the unemployed or just to extend their scope of activity and develop their position at the free education market.

The CPO scheme seriously changed the supply situation at the education market. Insiders estimate that of the relatively uncontrolled about 500 training providers

of the 1990s (which were merely registered) only about 60 have survived; the others have disappeared.

The government schemes to provide skills for the unemployed have been particularly attractive in the last few years. A CPO licence is needed to provide this training – and hence to be paid for it by the employment office. It is largely due to these government schemes that the vocational training centres have already achieved a significant role in terms of student numbers. According to figures from the Employment Agency (*Agencija po zaetosttá*), a total of around 50 000 people (most of them unemployed) took part in 2004 in vocational education and training at institutions of all kinds, about a third of them in a CPO.²⁰

Apart from the participants funded by employment offices, CPOs also have clients in the private sector – companies commissioning them to provide staff training – and a certain number of people paying the fees out of their own pockets, usually for courses in basic skills such as foreign languages or computing.

Unlike the independent education and training providers of the period immediately after the change of regime that were merely registered, licensed CPOs are now entitled to issue their own certificates. Quality control of the CPOs is in the hands of the National Agency for Vocational Education and Training NAPOO.

A glance at the register of licensed CPOs shows that they are sponsored or run by legal entities in all sections of society. These include very many small or micro enterprises providing vocational training either as their main or an additional business activity. Some large enterprises such as the ports and shipyards on the Black Sea, the state railways, the construction company *Glavbolgarstroj* and even McDonalds Bulgaria have registered their own CPOs. Some institutions in the formal education system (universities and vocational schools) have also applied for and been granted licences. Other operators of licensed CPOs are voluntary associations and NGOs, such as the Central Association of Cooperatives, a Jewish organization, the Confederation of Trade Unions KNSB (to be more exact, its training institute OKOM), various *Znánie* associations, the Bulgarian Chamber of Commerce, the umbrella organization of the Associations of Engineers (FNFS), the association “Mountains and People” which provides special training for mountain guides, the ecological farming association, which arranges agricultural voca-

²⁰ Concerning courses financed by the Employment Agency see p. 167, Section 3.5.4.

tional training, and the Association of private detectives and security guards. Last but not least the German Bulgarian Vocational Training Centres (BCCPO, see p. 191) hold CPO licences.

Applicants generally obtain licences for a whole series of occupations. Most of the licences issued to date relate to construction, engineering, catering and tourism, office work and craft trades. Applicants must be able to demonstrate their competence to NAPOO by submitting a number of documents including contracts with suitable teaching staff, proof of the availability of premises for theoretical and practical activities, and a detailed syllabus satisfying the national training requirements for the occupation in question. These syllabuses were originally written by the applicants themselves, but a market has now emerged for advisory companies that develop suitable syllabuses.

In May 2005 NAPOO was of the opinion that the number of licences would no longer rise appreciably. Few new applications were pending, the vast majority being follow-up applications: existing licensed CPOs applying to provide training for additional occupations, usually on a speculative basis and less often because of actual current demand for the courses in question. However, later it became clear, that this was a wrong forecast. NAPOO continued to issue new licences, and as said above In April 2007 the number of CPO licences was already about 420.

The number of 420 licences (in April 2007) does not reflect exactly the number of places or organisations where training is provided. Some of the bigger CPO licence holders have regional branches or co-operate with regional member organisations. In such cases the licence covers additional training units (called *učební svená*), attached to the genuine CPO. Their number was about 200 at that time.²¹ For example, the engineers' umbrella organization FNTS, the *Znánie* association and the Bulgarian Chamber of Commerce have branch structures of this kind. The key thing is that the licence is granted to a corporate body, without regard how it then allocates the work inside its own organisation.

The vocational training which can be acquired at a CPO goes up to Level 3. In order to take Level 4, it will still be necessary in future to attend an institution in

²¹ 254 licences, and about 100 additional training units (*učební svená*) in May 2005.

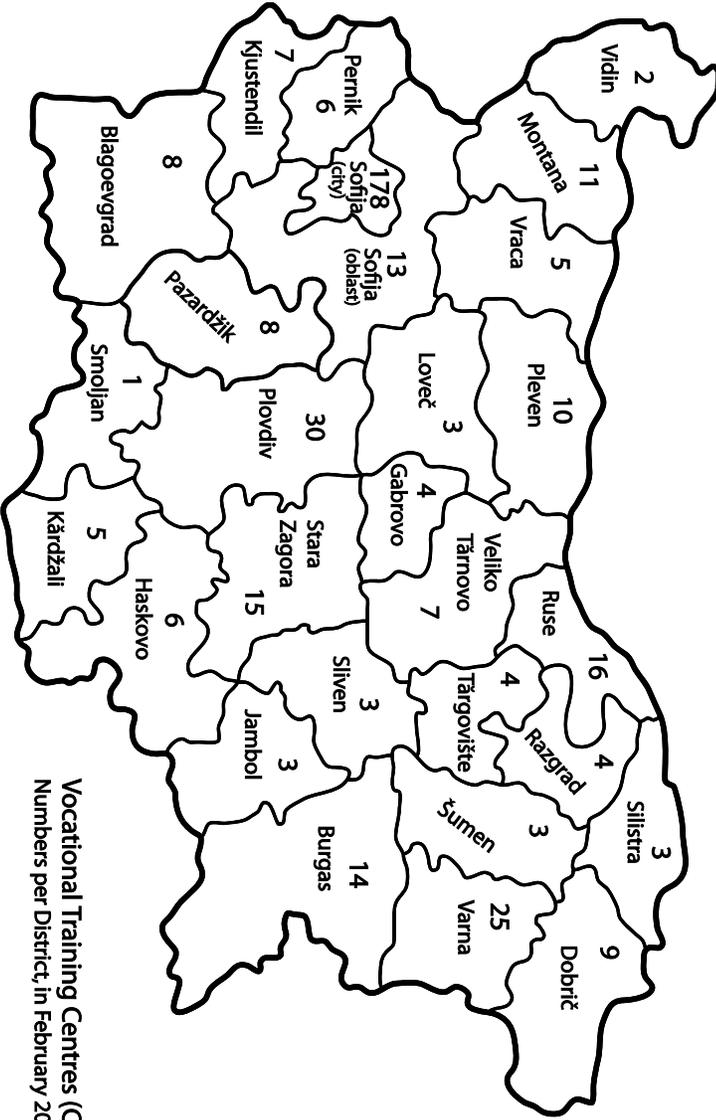
the formal system, i.e. a Vocational college (*profesionálnen koláž*), since it is only these that teach Level 4.

Table 4.2

VET degree students in courses offered by Vocational Training Centres (CPO) in 2006 ²²						
	Enrolments			Degrees attained		
	Total	Men	Women	Total	Men	Women
VET Level 1 – in CPO overall	4651	1951	2700	4571	1909	2662
in CPO of private institutions	4147	1859	2288	4065	1814	2251
in CPO of public institutions	504	92	412	506	95	411
VET Level 2 – in CPO overall	4000	1585	2415	3819	1525	2294
in CPO of private institutions	3835	1532	2303	3677	1479	2198
in CPO of public institutions	165	53	112	142	46	96
VET Level 3 – in CPO overall	1626	640	986	1267	671	596
in CPO of private institutions	1418	517	901	950	422	528
in CPO of public institutions	208	123	85	317	249	68

It is a somewhat theoretical question whether the new CPOs belong to the system of non-formal education or count as part of the formal system is a somewhat theoretical question. The National Agency for Vocational Education and Training (NAPOO), which awards the licences, tends to regard CPOs as part of formal education since the CPO can issue officially recognised certificates on VET degrees according to the national VET level system.

²² The table shows yet unpublished data collected by the NSI (April 2007).



Vocational Training Centres (CPO)
Numbers per District, in February 2007

4.4 German-Bulgarian Vocational Training Centres

Three German-Bulgarian vocational training centres (BGCPs)²³ have been in operation since 1995/1996. They have a special place in the Bulgarian vocational education and training system since they were more or less created “from outside” and then handed over after a certain time to Bulgarian control. The centres are located in the provincial cities of Pleven, Pazardžik and Stara Zagora. They have modern training premises which suit their respective subject areas: construction technology and timber processing in Pleven, office work, business and use of computers for CAD, CNC and office procedures in Pazardžik, and metal-working, welding, motor and agricultural machinery mechanics, plumbing and orthopaedic technology in Stara Zagora. In addition to this specialist training, all three BGCPs offer computer courses (for example following the “Xpert” certificate programme) and languages courses, chiefly for the local population.

The initiative to build them was taken by the German Federal Government in the 1990s, and the work was carried out by GOPA Consultants in behalf of the German Association for Technical Cooperation (GTZ), a German government-run company aiming at economic development support. After an initializing term, the three BGCPs were handed over to the Bulgarian Ministry of Labour and Social Policy in January 2001.

The original idea of BGCP was to offer the unemployed in particular vocational training of a European standard. The centres have hostels providing overnight accommodation for between 40 and 80 course participants. Both full-length occupational training courses (with 300 or more hours of teaching) and shorter inservice courses are provided. The three centres each have between 1000 and 1600 students per year (full-length and inservice courses combined). The shorter courses predominate.

Another task performed by the centres is advising small and medium-sized enterprises over matters ranging from obtaining loans or making contacts to drawing up business plans and market analyses. The main aim is to create jobs in the region.

²³ *Bálgaro-germánski céntrove za profesionáлно obučenie*; see their own website www.bgcpo.bg.

It is widely accepted that these German-Bulgarian vocational training centres do good work. In particular, they have good training facilities, such as the workshops. Critics argue, however, that the same amount of money should have been spent on improving existing establishments instead of building completely new ones. The defenders of the BGCPPO idea maintain, on the other hand, that vocational adult education and training differ considerably in both content and methodology from initial vocational training for young people. The critics, they say, overlook another feature of the BGCPPOs: the close cooperation with employers over vocational inservice training and the close relationship to practice, or the high level of practical content in the courses. This strong emphasis on practice is lacking in traditional establishments.

Currently (2007) two more vocational training centres of this type are being established. Both are intended to focus on preservice and inservice training for specialist staff working in tourism. One is in the town of Smoljan in the heart of the Rhodope mountains in Southern Bulgaria. The centre will concentrate its training activities on mountain tourism, especially alternative forms. GOPA consultants expected the conversion of the building to be finished in late 2007 and the centre to start its work in 2008. The second centre is to be established at the Black Sea coast. First there had been plans for Nesebar, an important centre of tourism north of Burgas, but because of difficulties to find an appropriate building, these plans have changed. Last news (in April 2007) was that the training centre would be set up somewhere south of Burgas.

4.5 Employers

There is generally very little vocational inservice training for employees in Bulgaria. Figure 4.1 (below, p. 194) compares the activity of enterprises in Europe in the field of inservice training (in 1999). It shows that in Bulgaria and Romania inservice training activities are least developed. According to data from Eurostat, the proportion of enterprises in Bulgaria providing inservice training is appreciably lower than in most other EU candidate countries, including the Czech Republic

(69 per cent in 1999) and Poland (39 per cent). However, it was higher than in Romania (17 per cent).²⁴

This was demonstrated in more detail by the studies from the National Statistics Institute (NSI) on continuing vocational education for the period 1999-2002²⁵, published in 2003, and the NSI study on vocational training in enterprises 2004, made in 2005 and published in 2006.²⁶ In most cases the management had little motivation to organize and carry out inservice training within the enterprise. This might be connected with the absence of those factors which usually create a need for inservice training: the introduction of technologically enhanced products and services, or new production methods. Only a few businesses have made innovative changes. Additionally, most companies are after a quick profit. Stability and sustainability are seldom among the aims of enterprise managements. Savings are therefore made in innovation and training. The figures show that:

- The proportion of enterprises that have introduced *technologically updated and improved products* and services is low; between 1999 and 2002, the proportion rose marginally, from 12.3 to 13.7 per cent, in 2004 it was 8.6 per cent.²⁷
- The proportion of enterprises that have introduced *new production methods* is also low; this rose from 1999 to 2002 from 10.4 to 11.9 per cent. In 2004 it was 6.7 per cent.²⁸

Employers' lack of enthusiasm for inservice training is also reflected in their general unwillingness to *evaluate the job skills* of their workforces. In 2004, about 81 per cent of privately owned enterprises carried out no evaluation of this kind, and 19 per cent did. With 21.8 per cent, the public sector was only slightly more active in this respect. The lowest proportion (16.5 per cent) was among micro-

²⁴ Eurostat: Statistics in Focus; Theme 3, 2/2002. When this book was finished in 2007, there were no more recent data available, since Eurostat conducts this type of study only every 6 years, starting from 1993.

²⁵ NSI: *Prodávčovašto profesionálno obučenie*. 2003.

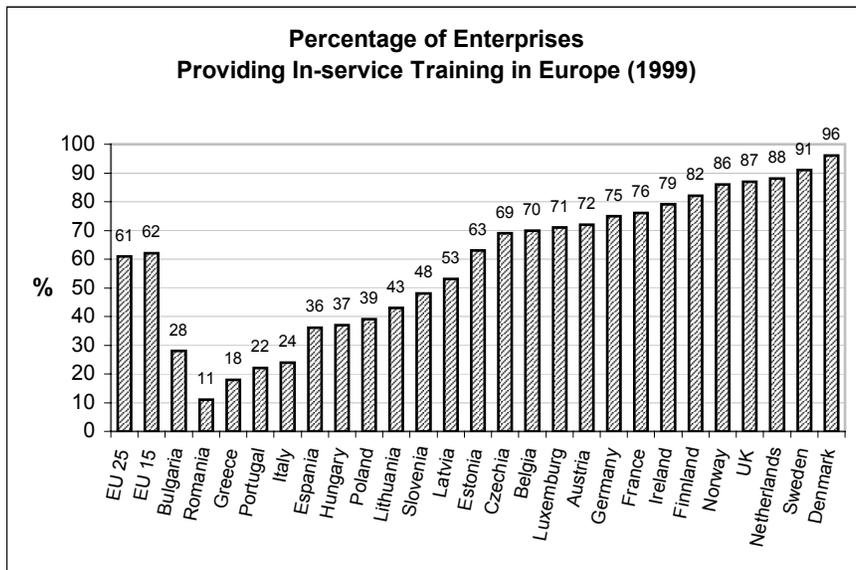
²⁶ NSI: *Profesionálno obučenie v predprijetijata*. Sofia 2005. (In what follows: POP 2005.)

²⁷ NSI: POP 2005, p. 50. – The considerable differences between the figures for 1999-2002 and 2004, that continue through all the tables, might suggest that the studies used different methodologies, making the results not comparable. Unfortunately, we could not clarify this with the experts of the National Statistics Institute before this book went to print in April 2007.

²⁸ POP 2005: p. 53.

enterprises²⁹ with five to nine employees.³⁰ The highest proportion (46.3 per cent) was among enterprises with over 250 employees.³¹

Figure 4.1



One clear indication of the serious intention of organizing inservice training for staff is the adoption of an inservice training plan the allocation of a budget for it. The proportion of enterprises with an inservice *training plan* has risen from 6.8 per cent (in 1999) to 8.8 per cent (in 2002). In 2004 it was 6.6 per cent. Inservice training plans are far more common among enterprises in the public sector (21 per cent in 2002, 15 per cent in 2004) and major companies (46 per cent in 2002,

²⁹ According to the definitions given in the Small Enterprises Act (*Zakón za málkite predpriátija*, s. 3), a micro enterprise (*mikropredpriátie*) in Bulgaria is an enterprise with fewer than ten staff, a small enterprise (*málko predpriátie*) is an enterprise with between ten and 49 staff, and a medium-sized enterprise (*srédno predpriátie*) is an enterprise with between 50 and 250 staff. There are also requirements relating to annual turnover and as-sets.

³⁰ Companies with staff less than 5 were not covered by the study.

³¹ NSI: Profesionálno obuèenie v predpriatijata [Vocational Training in Enterprises] 2005. p. 59. (In what follow, for short: POP 2005.)

45.8 per cent in 2004) than in private businesses (7 per cent in 2002, 5.1 per cent in 2004) and micro enterprises (5 per cent in 2002, but only 2.6 per cent in 2004). The proportion of enterprises with provisional *annual budgets* for inservice training was 4.5 per cent in 1999, 5.2 per cent in 2002 and 4.6 per cent in 2004. Almost one in three major companies have a budget for inservice training (about 30 per cent both in 2002 and 2004), but this is the case in only very few micro enterprises (2.3 per cent of, 2.2 in 2004). Only 2.4 per cent of all enterprises had their own training centres in 1999. In 2002 it was 2.4 per cent, in 2004 only 1.3 per cent.³²

4.5.1 Inservice Training Organized by Employers

Vocational inservice training organized by employers is rather the exception than the rule. In the four-year period 1999-2002, the proportion of enterprises providing any form of vocational training rose from 28 to 35 per cent, but then fell to 26.8 per cent in 2004. In absolute figures, of the total of 44 900 enterprises, just over 15 500 arranged some kind of inservice training in the year 2002, either by conducting courses or opting for other forms of inservice training, such as periods of practical training at the workplace, inservice training through rotation at the workplace, participation in conferences, seminars, etc. In 2004, of the total of 53 000 enterprises, 14 200 organised any form of inservice training.³³

Inservice training is found more often in enterprises of the public sector (57 per cent in 2002, 40.6 per cent in 2004) than in the private sector (31 per cent in 2002, 24.3 per cent in 2004). And the figures by size of the enterprise: In 2004, 70 per cent of the larger enterprises in Bulgaria carried out some inservice training, while only 18.5 per cent of micro enterprises did so (Figure 4.1). Data for 2002 are similar, although slightly higher.

There are substantial differences between different sectors³⁴ of the economy (see Figure 4.2). While, for example, 80 per cent of electricity, natural gas and water supply enterprises provided inservice training for their employees in 2002 (or 77

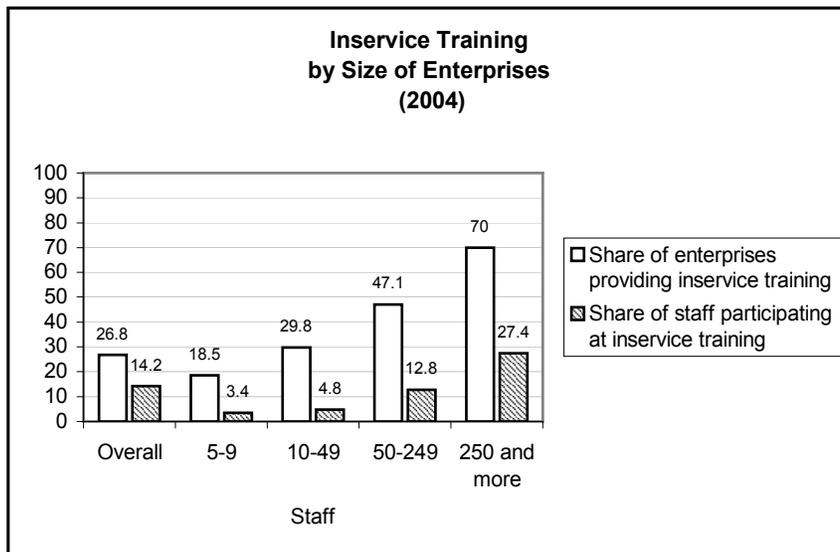
³² POP 2005, p. 64.

³³ POP 2005, p. 76.

³⁴ Distribution of the field of economic activity according to NACE.

per cent in 2004), this figure was only 18 per cent (12 in 2004) in the hotel and catering sector.

Figure 4.2



Concerning the types of inservice training, in 2004, of those enterprises that had any form of inservice training, 4.8 per cent offered internal courses 9.7 per cent offered external courses, 17 per cent had “pre-planned training periods, instruction or practical experience”, 1.9 per cent “planned training through job rotation”, 2.5 per cent “attending training classes” (*poseštávane na krážóci za obučénie*), 8.4 per cent self-learning, 11.2 per cent “instructions at conferences, meetings or seminars” and 3.6 per cent had events of initial vocational training (*pǎrvonačálno profesionálno obučénie*).³⁵

³⁵ POP 2005, p. 80-81.

4.5.2 Participation in In-house Inservice Training

According to the NSI studies on inservice training, 11 per cent of all those in employment took part in inservice training in 2002 (176 000 persons participating). In 2004 it was 14.2 per cent, or 247 000 persons. Men were more included in training measures (55 per cent of overall participants were men) than women (45 per cent) in both years.

The number of staff participating rises with the number employed by the enterprise (see Figure 4.3). The proportion is appreciably higher in enterprises with more than 250 employees (18 per cent in 2002, and 27.4 per cent in 2004) than in micro enterprises (4 per cent in 2002 and 3.4 in 2004).

There were significant differences in course participation between employees in the various *sectors of the economy* (Figure 4.2). For example, 43 per cent in 2002 and even 72 per cent in 2004) of those employed in finance and 35 per cent (in 2004 nearly unchanged 34.8) of those in raw materials extraction, took part in courses. The lowest rates of participation were hotels and restaurants: 1.6 per cent in 2004.³⁶

The amount of *time spent by an average participant* in inservice training fell from 35 hours in 1999 to 24 hours in 2002 and to 17.2 hours in 2004. The highest number of hours was found in the health and social welfare sector, followed by hotels and restaurants (26.8) and the education sector (25.7), all in 2004.

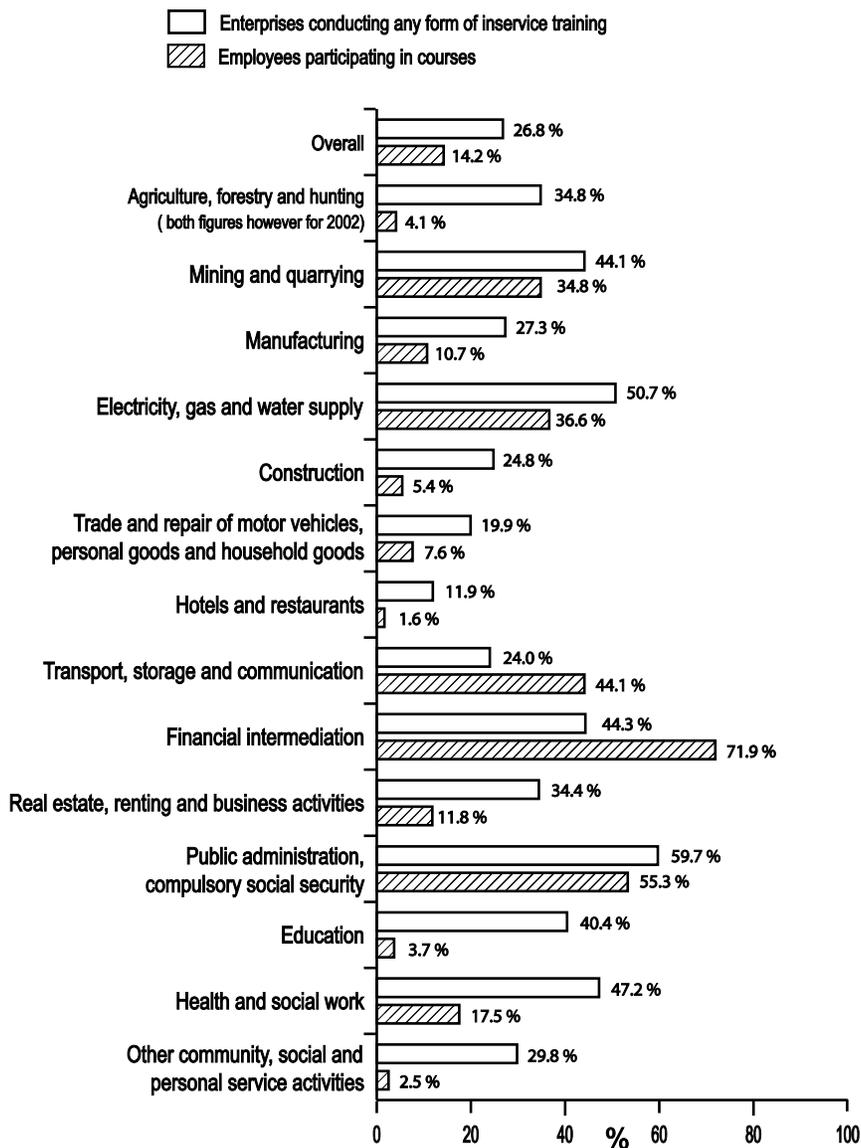
Overall, the 53 000 enterprises that were (mathematically) covered by the NSI survey in 2005 (concerning data for 2004), had organised 48 000 inservice training events (courses, and other forms) in 2004. 3.7 per cent of the events were language courses, 8.7 per cent trainings in marketing and sales, 11.5 per cent trainings in accounting and finance, 9.8 per cent management and administration and 1.7 per cent office skills, 6.4 per cent personal skills, 9.9 per cent computer skills, 2.1 per cent support of and operating with IT, 18.4 per cent engineering and manufacturing, 9.5 per cent environment protection, 1.4 per cent services, and 16.9 per cent any other.³⁷

³⁶ POP 2005, p. 88.

³⁷ POP 2005, p. 118-119, showing as well the preferences of the several NACE branches.

Figure 4.3

Inservice Training by Sectors of Economy in Bulgaria (2004)



Data from NSI: Vocational Training in Enterprises, 2006, table B1A, p. 76, and table C1A, p. 88.

Inservice training courses can be organised by the enterprise itself (intern), or by an extern provider (extern). In 2004, of the 53 000 enterprises about 2550 offered courses organised by own staff (intern), and about 5150 chose extern course providers.³⁸

Concerning externally managed courses, 1.85 million hours of (paid) working time were used for these courses in 2004. 22.4 per cent of this time was spent at public education institutions such as Vocational *gimnázii*, Vocational colleges and universities. 5 per cent was spent at their counterparts in private ownership. 21.2 per cent were spent at specialised training institutions in state ownership, and 31.6 per cent at private such. 3 per cent were spent in companies that supply equipment (and train the personnel to use it).³⁹

4.5.3 Expenditure by Enterprises on Inservice Training for their Staffs

Since training activities of employers in Bulgaria are relatively low in an European comparison, the sums spent for it are relatively small as well. In 2002, enterprises spent 21 million leva (about 11 million euros) on inservice training, in 2004 it were 40 million (about 21 million euros).⁴⁰ Costs per participant were about 160 leva (82 euros) in 2004 (but 401 leva in 1999 and 117 leva in 2002).

In 2004, the largest amounts were spent on training for staff in the economic area “Trade and repair of motor vehicles and personal household goods” (394 leva), “Real estate, renting and business services” (276 leva) and “financial intermediation” (267 leva). Relatively small were the expenditures per participant in the economic areas “mining and quarrying” (67 leva), manufacturing (78 leva) and health and social work (85 leva). The education sector was in the middle (202 leva).⁴¹

In financial terms, expenditure on inservice training by large enterprises is much more efficient. This at least is the obvious interpretation of the fact that the amount per course participant needed by large enterprises in 2002 was 82 leva

³⁸ POP 2005, p. 80.

³⁹ POP 2005, p. 126-127.

⁴⁰ POP 2005, p. 134-135.

⁴¹ POP 2005 p. 138.

(and 114 leva in 2004), as against 258 leva (and 336 leva in 2004) for micro enterprises. The average cost of per course participant in 2004 was 161 leva.⁴²

4.6 Trade Unions

Following the change of regime in 1990, the adult education and training provided by trade unions focused initially on their own paid staff and officials. However, since the state and international organizations opened up a large market by introducing training programmes for the unemployed, trade union education and training have also expanded into pre-service and inservice vocational training in the wider sense.

Three core associations of trade unions are recognised nationally as representing the interests of workers in Bulgaria, and take part in tripartite negotiations. The largest is KNSB (*Konfederácija na nezavisimite sindikáti v Bălgárjia*), which currently (2005) has around 380 000 members.⁴³ In 1990, this was founded on the remains of the former, more or less de facto state confederation of trade unions which had previously covered practically all those in employment. The smaller association, which currently has 150 000 members, is *Podkrépa*, which grew rapidly during the political turmoil in much the same way as the Polish *Solidarność*, and was by far the more “political” body immediately after the change of regime.⁴⁴ *Podkrépa* represents about 30 national (branch) trade unions. In 2004, a third association of trade unions, the *Promjana* Trade Union, was recognized by the Sakskoburggotski government as a national representative of employees, which means that it can participate in the tripartite negotiations.⁴⁵ *Promjana* Trade Unions consists of about 20 branch organizations allocated in 28 regional structures and has, as it reports, over 50 000 members. The official name is *Săjuz na sindikátite v Obedinénie “Promjana”*.

Since the early 1990s, trade unions in Bulgaria have seen their membership decline sharply. At first, KNSB had 1.2 million members, and *Podkrépa* 400 000. As

⁴² POP 2005 p. 139.

⁴³ Confederation of Independent Trade Unions of Bulgaria; www.knsb-bg.org

⁴⁴ *Konfederácija na trudá „Podkrépa“*, www.podkrepa.org. The name means “support”.

⁴⁵ For example, it participated together with the other Associations in the council that worked on issuing the “Human Resource Development Plan 2007-2013.”

in many Eastern European countries in transition, the trade unions find it difficult to activate workers. One obvious reason is that trade unions were not allowed during the socialist years to express their own views, their function being primarily to implement national policy, particularly the fulfilment of economic plans, and only secondarily to represent the interests of workers.

The education and training activities of KNSB thus began in the early 1990s with a programme of training for trade union officials at all levels, in which around 5000 people took part. This covered the development of industrial relations,⁴⁶ the new role of trade unions as independent representative bodies, and the rapid changes in society and legislation to which trade union officials needed to adapt. Further courses soon followed, initially for trade union officials, members of union committees and employment protection groups. Courses were, however, increasingly opened up to participants from outside the ranks of the trade unions, such as a Master's course in personnel management, in which only two fifths of the 240 participants were trade union members, and a Master's course for financial experts, in which only 20 of the 120 participants were trade union members. KNSB believes that one indirect effect of this open-door policy will be that wider sections of the population will become more favourably inclined to the idea of trade unions, said KNSB officials in one of our interviews in 2005.

KNSB education and training are organized essentially by two subsidiary institutions, the "Institute for Industrial Relations and Management" (OKOM)⁴⁷ and the Workers' Training College (KRO).⁴⁸ These are underpinned by a trade union social research institute⁴⁹ with twelve staff, which provides background data, forecasts of needs, etc.

The education and training described above, which is largely concerned with matters relevant to the work of trade unions (even though the majority of participants are no longer trade union members) has recently expanded to include purely vocational courses, split between OKOM and KRO. Since 2002, OKOM

⁴⁶ Relations between employers and trade unions, with particular reference to collective negotiations between them.

⁴⁷ *Institút po industriálni otnošenija i menidžmānt.*

⁴⁸ *Kolěž za rabótničesko obučenie.*

⁴⁹ *Institút za sociální i sindikální izslédvanija.*

has got a licence for a vocational training centre (CPO)⁵⁰ and is entitled to provide training for around 30 occupations such as office management, secretarial work, data processing, computing, bricklaying, window-making, social work, hotel administration and insurance selling. About 600 people took part in the 52 courses that began in October 2004, some of which finished in May 2005. These courses are chiefly for the unemployed. As is customary, they are funded out of various state retraining programmes. In order to simplify the organization, the Workers' Training College (KRO) run by the Confederation was also expected to receive a CPO licence for a number of occupations, so that the management institute OKOM could again concentrate on training senior trade union officials.

Podkrépa has a special department for trade union education, namely the Confederative Department "Trade Union Development". Its basic functions is to organize the training of the members and leaders from all levels, to set up programs, training materials and equipment, etc. to coordinate the training process etc. A confederative secretary, two experts and twenty trainers work in the department.⁵¹ Ten of the trainers provide training all over Bulgaria, the remaining ten are attached to the regional departments for trade union education. The seminars of the department concentrate on subjects of special interest for trade unions and skills useful for trade union leaders: Labour code, collective bargaining, collective disputes settlement, dealing with mass media, privatisation in Bulgaria, leadership skills, health and safety at the workplace, ILO standards and workers rights, etc.

4.7 Training in Craft Trades

Training for craft trade apprentices is governed by the Trades Act (*Zakón za zanajátite*)⁵² and the several regulations of the Bulgarian Chamber of Craft Trades,⁵³ which are drawn up in consultation with the National Agency for Vocational Education and Training (NAPOO).⁵⁴

⁵⁰ Licence No. 200212029.

⁵¹ See Podkrepa's website www.podkrepa.org (accessed on 14 April 2007).

⁵² See above p. 144.

⁵³ *Nacionálna zanajatčijska kámara, NZK*, www.nzkgb.org.

⁵⁴ *Nacionálna agéncija za profesionálno obrazovanie i obučenie*.

The 2001 Trades Act (*Zakón za zanajátite*), which governs the exercise of craft trades, the organization of the craft trade body and training, is influenced by German experience and traditions. It was drafted with the assistance of the Koblenz (a town in Germany) Chamber of Craft Trades, which has involved itself in the development of craft trades in Eastern Europe, using German Federal Government funding. The Koblenz Chamber of Craft Trades also was behind the establishment of the Bulgarian Chamber of Craft Trades in 1998 which represents the currently 24 Regional Chambers.⁵⁵ However, the 2001 Trades Act also looks back to an earlier tradition in Bulgaria, which was discarded in 1948 as part of the socialist restructuring of society: the first Bulgarian Trades Act (*Zakón za urédna na esnáfite*, the Establishment of Guilds Act) was adopted in 1898, 20 years after the foundation of the modern Bulgarian state. Until then the craft guilds (*esnáfi*) had been governed by customs and articles of association developed largely during the Ottoman period, as may be seen in the use of the Ottoman Turkish word *esnaf* for “guild”. This was followed in 1903 by the “Craft and Guild Associations Act” (*Zakón za zanajatčijsko-esnáfskite sdruženija*), the 1910 “Organization of Craft Trades and Support for Craft Trades Act” (*Zakón za organizirane i podpomágane na zanajátite*) and the 1933 Trades Act (*Zakón za zanajátite*). This was in force until abolished in 1948.

The new 2001 Act, which is, in some aspects, a return to the pre-socialist craft trade traditions, defines the training of tradespeople (*zanajatčijsko obučenje*) as the transmission and learning of the occupational, organizational and creative knowledge and skills necessary for the exercise of the craft trade in question. “Craft trade” (*zanaját*) is taken to mean the production of goods and the provision of services that are specifically listed at the end of the Act. The work is to be carried out “in a craft trade manner” (*po zanajatčijski náčin*, s. 3 para. 2), that is, by means of a non-automated process, generally guided by hand.

The list of craft trades, as defined by the Act, used to comprise 129 vocations. By an amendment in 2006, two of them (in the field of health and hygiene services) were withdrawn from the list.⁵⁶ Thus, 127 vocations remain to be regarded as

⁵⁵ The Bulgarian Chamber of Craft Trades (BZK) adopted new Articles of Association in 2001 and became the NZK (National Chamber of Craft Trades, *Nacionálna zanajatčijska kámara*). See its website: www.nzkgb.org

⁵⁶ They were regarded as belonging rather to the regulated professions. The Chamber of Craft Trades however, is trying (as for 2007) to return both vocations to its list.

craft trades, so far. They comprise so common ones as tailor, bricklayer, hair-dresser and car mechanic, but there are as well very specific ones that are economically quite unimportant and rather connected to traditional culture and folklore, such as *kopaničár* (a kind of traditional woodcarver in Bulgaria and Macedonia, chiefly working with walnut wood) and *gajtandžija*, a kind of passementerie maker. The trades are divided into the following groups: • Building and restoration • Electro-technics and metalworking • Processing of timber and other materials • Sewing, textiles and leatherworking • Production of foodstuffs and drinks • Media, advertising and communication • Health and hygiene services • Glass and ceramic processing • Artistic crafts.

For the training of tradespeople, the Act provides for three stages of craft trades training, supposed to follow the principle of combining practical work and theoretical instruction. The three stages are, in line with older Bulgarian and other European traditions, apprentice (*čirák* = apprentice, *čirakúvane* = apprenticeship), journeyman (*kálfa*) and master (*májstor*). According to the Act, apprentices must be at least 16 years of age. This coincides with the National Education Act that provides for compulsory school education up to the age of 16. Additionally, an apprenticeship contract cannot be signed with regular students of schools or higher education institutions.

Apprenticeship Training Regulation

More details on how to organise apprenticeship training are provided by the Apprenticeship Training Regulation (*Právilnik za redá I uslóvojata za provéždane na zanajatčijsko obučenie na čiráci*), as approved by the National Chamber of Craft Trades (NZK) on 30 June 2006.⁵⁷ Most of its regulations repeat sections of the Trades Act, for instance the minimum age of apprentices. Some of the more relevant regulations are: • Apprenticeship training consists of practical and theoretical parts. • The apprenticeship ends with an examination called journeyman examination (*kálfenski izpit*) (s. 2). • The examinations are held by the Regional Chambers of Craft Trades (s. 3). • Teaching programmes are set up by the National Chamber of Craft Trades. To this end, the NZK creates expert commissions that consist of masters of the given trade, representatives of the respective trade associations, of the NZK, and other experts. • The teaching programmes define

⁵⁷ The regulation is available from www.nzkgb.com (accessed on 9 April 2007).

the level of knowledge and practical skills necessary to pass the examination (s. 8 para 1-4). • In order to train apprentices, a crafts enterprise must have a master registered with the Regional Chamber. Teaching programmes must exist that have been approved by the NZK. There must be an appropriate workplace provided by the enterprise. Additionally, there must be appropriate premises for teaching of theoretical subjects. The latter, however, can be provided outside the crafts enterprise, usually by some kind of education provider. (s. 9 para. 1). These requirements are controlled by the Regional Chamber of Craft Trades (RZK) (s. 9 para. 2). • S. 9 para. 3 explicitly provides that theoretical instruction can be provided by vocational schools (public or private) or by the licensed Centres for vocational education (CPO).⁵⁸

Apprenticeship training lasts at least three and at most four years (s. 47 Trades Act) The prescribed length of apprenticeship training is in line with the state system of vocational training in schools, which also lasts up to four years. This is relatively long, compared to other European countries. The craft trades organizations themselves are pressing for a change in the law to allow a shorter training period. In spring 2007, this issue was pending yet, however the National Chamber of Craft Trades was optimistic that a reduction to 2 years of apprenticeship as a minimum requirement could be agreed shortly, together with a range of other amendments to the Trades Act.

Regulations for the Journeyman Examination

The Regulations for the Journeyman Examination (*Právilník za provéždane na kálfesnki izpit*) were adopted by the NZK in December 2004 for the first time. The most recent ammendmend (as for April 2007) was in April 2006.

As provided by the regulation, journeyman examinations are organised by the Regional Chamber of Craft Trades (RZK) twice a year (s. 1-4). The RZK calls an examination board. Each board has at least three members. They are both masters and journeymen of the respective trade; the chairman of the board must be a master with at least five years experience. The regular mandate lasts five years. (S. 5-8). In order to sit a journeyman examination, an apprentice must have been working for at least three years (s. 14). The examination must follow certain “ex-

⁵⁸ For details on the CPO, see Chapter 4.3 from p. 185.

amination conspects" (*izpitni konspékti*, a kind of rough guides for contents of an examination) set up by commissions of experienced masters of the respective trade, and approved by the NZK (s. 19). The examination is held on two days, one for theory (in writing, four hours), one for practical skills (up to eight hours) (s. 20-22). The journeyman certificate is issued by the Regional Chamber of Craft Trades (s. 26).

Section 25 of the regulation says that journeyman certificates can be issued without an examination to those who have completed vocational education level 2 or 3 of the national system. (This corresponds to s. 50 para. 2 of the Trades Act.) This opens the system of craft trades to those who have attended one of the many Vocational schools or Vocational *gimnázii* in Bulgaria, of course, provided that their vocation corresponds with one of the craft trades. Indeed, in spring 2007, the National Chamber of Craft Trades reported of about 1400 registered journeymen, and virtually all of them had been awarded their journeyman certificate based on their previous vocational education in the state school system. There had been only single cases of journeyman certificates issued after a regular journeyman examination, up to then.

Regulations for the Master Craftman's Examination

The Regulations for the Master Craftman's Examination (*Právilník za provéždane na májstorski izpit*) have been adopted by the National Chamber of Craft Trades (NZK) in April 2006. According to the regulations, the duties of the NZK concerning master's examinations are (besides others) • to approve the teaching programmes for master candidates • to approve the conspects (examination guides) and the criteria for the exams • to approve the examination procedure • to approve the examination boards nominated by the Regional Chambers • to issue the master craftsman's diploma.

The regulation has the following sections: • General regulations • Constitution of the examination boards • Work of the examination boards • Conducting of the examination • Register of Craftsmen, and issuing of the master craftsman's certificates.

A master's certificate can only be awarded by the National Chamber of Craft Trades (*Nacionálna zanajatčijska kámara*) (s. 55). Under the terms of the Act, a master must have lengthy experience of the trade, the appropriate practical skills

and the necessary knowledge of several fields of theory as entrepreneurship, general commercial and staff management skills and pedagogy. These skills are tested by means of a master examination (s. 57).

In practice, it is proprietors of businesses, often engineers for example, who apply to the National Chamber of Craft Trades for a master's certificate. According to s. 59 of the Trades Act, the NZK can issue a master's certificate to those who have completed secondary or higher education in an appropriate vocation. This is the way how most of the current master certificates have been issued, given the short time of existence of the craft trade organisation. In May 2005 the Chamber of Craft Trades suggested a figure of about 7000 master's certificates issued. In view of the fact that the craft trades organization was only just being set up, this was a considerable number. In April 2007, a Chamber representative put the number of registered master's at an estimate 10 000 or more, and the number of crafts enterprises at 7000. A recent growth was said to be due to a change in tax regulations which required all trades companies to prove whether or not they were registered with the Chambers of Craft Trades. Most masters were haircutters, beauticians, masseurs, car mechanics, opticians, bakers, tailors, electrical engineering technicians, jewellers and watchmakers.

Craft Trades Training in Practice

Craft trade apprenticeship training is still in its early stages in Bulgaria and has not yet had a commensurate impact on the training market. In May 2005, when the first interviews for book were being conducted, the Chamber of Craft Trades could only provide estimates since data are not collated centrally, but by the regional Chambers. According to those estimates, around 300 people were in some kind of craft trade apprenticeship at the beginning of 2005. Most of them were not a regular apprenticeship as is anticipated in the legislation (i.e., a contract for a three to four-year apprenticeship leading directly to a journeyman examination), but was restricted to a seven-month training programme funded by a state employment scheme to retrain unemployed adults. Only a small proportion were young people or young adults of typical apprenticeship age. The seven-month courses ended with a certificate. As NZK officials said, the idea was that those completing these courses could – if they wished – subsequently continue training up to the journeyman examination, depending of course on the availability of such training places.

In April 2007, things had already developed. Craft Trades representatives said that about 700 young people currently were registered as employed following apprenticeship schemes. The Chamber expected that most of them would pass the journeyman examination in 2007 or the following years. About two thirds of them were of the three craft trades manicurist/pedicurist, beautician and haircutter. Other popular trades were car mechanic and the various trades dealing with textile processing. A positive impact on the number of registered apprentices had been made by a new regulation which provided tax relief for enterprises in some of the craft trades when employing apprentices.⁵⁹ A problem was that for many of the apprentices there had not yet been found a regular way to deliver the theoretical part of the training. The number of 700 apprentices was a considerable development compared with two years ago. However, compared with the about 35 000 graduates of vocational education (overall, not only craft trades) which leave the state school system every year, it shows that the craft trades organisations have to do a lot work yet in order to really become an important factor in vocational education in Bulgaria.

The general idea of the Bulgarian craft trades, concerning **theoretical instruction**, is to have something like the “dual system” for apprenticeship training in Germany, and similarly in Austria and Switzerland. The German systems provides three or four days a week spent in the workplace for practical training, and one or two days of theoretical instruction in an institution such as a vocational college or vocational training centre, depending on the local circumstances. Initially, it seemed that the Bulgarian Chambers of Craft Trades would find an agreement with the ubiquitous state vocational schools (chiefly *profesionálni gimnázii*, and colleges). However, the Chambers faced various problems with the state schools. It appeared that that the state institutions (which had been used for decades to have sole responsibility for vocational education and training) regarded apprenticeship training as a form of competition rather than as an opportunity to further develop their own provision. Thus, the NZK looked for an alternative solution and decided to set up its own teaching structure in form of a CPO (*Vocational Training Centre*, see the explanations on p. 185). In April 2007, the

⁵⁹ Reducing the *paténten danák* to 50 per cent of the regular sum. This is based on a special agreement with the tax authorities and concerned only a little number of craft trades that were in urgent need of staff. With respect to the positive results to the number of apprentices, the Chambers planned, step by step, to expand this agreement to other craft trades.

license was expected to be issued soon. This craft trades CPO is attached to the National Chamber of Craft Trades. The plan is to create teaching branches (*učební zvená*) in Sofia and in 13 towns throughout the country (Blagoevgrad, Burgas, Varna, Vidin, Vraca, Gabrovo, Dobrič, Kjustendil, Montana, Ruse, Smoljan and Sliven), the teaching branches being attached to the respective Regional Chambers of Craft Trades. This looked like a clever solution. CPOs must not necessarily have their own premises, but can use premises and services of other providers. Chamber representatives said that indeed in many cases the teaching staff and even class rooms of local vocational schools (*gimnázii*, colleges) would be used. However, with the craft trades CPO organising the courses, the process of apprenticeship training would remain under control of the Chamber. Chamber officials expected a double effect from this arrangement: Apprentices would learn the theoretical aspects of their craft from the school teachers, and the school teachers would get in closer contact with vocational practice, the lack of which is a constant complaint concerning the vocational schools.

One major problem from the point of view of the craft trades is that the apprenticeship training scheme is still little known among the general population, who lost their familiarity with independent trades organizations during the years of socialism. Demand therefore remains low. The Chamber of Craft Trades would like to make this new model of vocational training better known through more PR.

Another problem with apprenticeship training is funding. In case of the 300 or so seven-month apprenticeship contracts in 2005, mentioned above, a state employment scheme covered the wage costs (including ancillary wage costs), but this is not to be a solution for regular three years apprentices. Thus, the NZK is trying to support its members by a policy, seeking to agree various forms of state support, for example by tax reliefs. This was, in 2007, not yet finally settled. The second question is how to finance the theoretical instruction of apprentices. Here again the Chambers look forward to getting state support. One solution that was being discussed in 2007 was a voucher system, inspired by the Belgian system.

The National Chamber of Craft Trades insists that the apprenticeship scheme offers the better, more practical training, compared with the vocational schools. Critics would object that practical training at a modern vocational training centre is better than apprenticeship in a small business, which can usually only offer a limited range of activities. On the other hand, the state school and vocational

training system is, for various reasons, at the moment hardly in a position to provide modern practical training.

Strategy for Craft Trades Training 2006-2008

In a process of discussion with several actors involved in craft trades training, started in 2005, the Chambers of Craft Trades have issued in 2006 a Strategy to develop training in craft trades,⁶⁰ with a variety of measures to be taken in 2006-2008. The purpose of the strategy is to help develop the system of craft trades training by creating the necessary concepts, methodology, activity plans for a quality training in craft trades. (p. 12). The strategy defines five priorities, each of them with up to nine more concrete activities, to be undertaken in 2006-2008.

1. Improving the co-operation of the institutions involved in craft trade training. (Measures under this objective concentrate on capacity building for co-operation in the sector; on appropriate changes in the relevant regulations, acts, etc. There are several instruments to improve the dialogue of institutions.)
2. Creating the preconditions for quality education in craft trades. (This comprises for instance to qualify masters who train apprentices, to issue all necessary documents, and to take care that Bulgarian craft trades certificates are recognized all over Europe.)
3. Providing for more investments in crafts enterprises that offer craft trades training. (For example, the Chambers want to agree with the state institutions to encourage more unemployed to participate in craft trades training; the strategy asks for new tax regulations to motivate crafts enterprises to employ more apprentices and journeymen; training for the manager of the enterprises)
4. Improving the accessibility of craft trades training. (This covers, inter alia, to improve horizontal and vertical mobility, especially concerning mobility between the craft trades and the vocational schools; special attention shall be laid on disadvantaged as possible target group for training in craft trades; an information system on supply and demand of training in craft trades is to be created, as well as means for distance learning, concerning the theoretical part of training.)

⁶⁰ *Stratégija za razvítie na zanajatskijskoto obučenje, 2006-2008.*

5. Improving information on training in craft trades, and academic support. (Measures listed here are, besides others: to create a methodology of training in craft trades, and to implement it; masters who train apprentices shall get methodological support; teaching material shall be provided which can be used for self-directed learning of masters, journeymen and apprentices.

As a result of the strategy, the Chambers expect:

- To improve the dialogue between the institutions involved in craft trades training
- To provide preconditions for quality training concerning regulations, methodology, equipment, management etc.
- To rise investment into craft trades training, especially by the crafts enterprises
- To improve the horizontal and vertical mobility between the system of craft trades training and the system of vocational education in the (mainly state) schools system.
- To create an information system for training in craft trades (supply and demand)
- Support to training in craft trades by research and methodology and distribution of best practice

4.8 “*Čítalište*” Cultural Centres

Bulgarian cultural centres (*čitálišta*, singular *čitálište*) are self-governing cultural and educational institutions with a separate legal status. They go back to a 19th century tradition when, still under Ottoman rule, libraries, cultural and educational associations were set up in many up-and-coming towns as private initiatives. The intention of the merchants and tradespeople who sponsored these initiatives was frequently to spread European ideals of education.⁶¹ Other important activists of the *čitálište* movement were the orthodox priests and, if there was already a school, the teachers. The aims set out in the articles of association adopted by these early cultural associations were, for example, “to raise the morale of the population”, “to instruct adults unable to read and write”, “to help children from poor families to attend school” and “to promote general education”.

At first, cultural centres concentrated on setting up libraries (book-rooms or reading rooms) that were open to everyone. Books or the latest newspapers were

⁶¹ See above p. 146.

read aloud on Sundays, and sometimes in the evenings, and there were also lectures and discussions. The speakers invited were the educated people of the day: teachers, merchants, pharmacists, and so on.

The cultural centre tradition is often seen also as part of the movement to create a Bulgarian nation and a Bulgarian nation-state. Because the movement came into existence entirely without state involvement, *čitališta* can also be regarded as typical “civil society” adult education centres even though none of these terms was current in the 19th century, of course.

Once the state was founded in 1879, the activities of the cultural centres expanded. They made contact with newly established organizations and institutions such as consumer and sales associations, temperance societies and intellectual circles. The physical facilities of the cultural centres also grew, so that a separate building or separate accommodation for a *čitalište* could be found in almost every community, alongside the local school. The *čitalište* movement, with its wide range of activities, laid the foundation for many aspects of modern cultural life in Bulgaria, including music and museums. A crucial period for the *čitalište* movement were the 1920s and 1930s, when Bulgaria developed quickly in all aspects of economy and society. *Čitališta* now were to be found not only in the cities, but in bigger villages as well.

During the socialist era following the Second World War, the cultural centres ceased to be independent civil society institutions and became part of the state cultural system. Over the decades they were placed under the control of a variety of different state institutions such as the Ministry of Propaganda or the “Fatherland Front” (*Otėčestven front*), the unified organization covering all areas of life that was dominated by the Communist Party. An independent association of cultural centres was briefly set up during the socialist era, but they generally remained subject to central government control and were funded by the state. However, this control went hand in hand with an expansion of the network, and the cultural centres continued to acquire their own premises. While there were about 400 cultural centres in Bulgaria in 1944 –roughly one in every small town and the more important villages –the number rose to around 4000 by the end of the socialist era (this number including branches of the larger urban cultural centres).

The political upheaval in 1989 completely changed the way in which the cultural centres work. The state withdrew from its supervisory role, and partly also from its funding role. As a result, the cultural centres faced the task of finding new ways of operating. The more active cultural centres are now once again in effect independent adult education institutions which are combined into several national networks.

The particular role of the cultural centres can still be seen today in the fact that they are not treated in law as normal associations / organizations, but are governed by their own law (National Cultural Centres Act / *Zakón za narodninte čítališta*), which is nonetheless very similar to the Associations Act (*Zakón za juridičeskite licá s néstopanska cel*). They usually work very closely with the local authorities, especially concerning funding and staffing.

Table 4.3

Number of <i>čítališta</i> and <i>čítalište</i> Members ⁶²				
	1998	1999	2000	2005
<i>Čítališta</i> overall	3 125	3 056	3 027	2 838
in towns	514	510	511	539
in villages	2 611	2 546	2 516	2 299
Members	191 000	180 000	170 000	164 000
in towns	86 000	81 000	740 00	68 000
in villages	105 000	99 000	96 000	96 000

In terms of the institutions in the countries of the European Union, the present *čítališta* may be likened to the German Volkshochschulen. However, the German Volkshochschulen have been forced, during recent years, to find new ways of financing, since municipal budgets have been seriously cut. This development is still a future prospect for the Bulgarian *čítališta*.

Number. In 2005, there were 2838 cultural centres of varying size in Bulgaria, from large establishments with their own premises to small village associations

⁶² Ibidem

with few activities.⁶³ These were spread across some 250 towns and cities, and about 5000 villages. As Table 4.3 shows, the number of *čitálišta* has been steadily falling in recent years. This is mainly because of the increasing age and declining number of village dwellers.

Table 4.4

Čítálišta Activities in 2005 ⁶⁴			
	Number	Participants	Events organised
Language courses	327	4 827	
Music classes	440	4 624	
Ballet classes	149	3 079	
Other courses	428	5 766	
Music groups	1 769	22 865	1 522
Dance groups	1 522	28 222	9 779
Local folklore groups (<i>kolektívi za ízvoren folkór</i>)	2 017	27 305	10 363
Theatre groups	520	6 049	2 807
Clubs and Circles (<i>klúbove i krážóci</i>)	941	14 095	4 143
Various amateur groups (<i>ljubítelski kolektívi</i>)	7 494	108 294	43 224
Other groups	725	9 758	3 196
Cultural events ⁶⁵	51 010		

Activity. The activity of the *čitálišta* varies hugely, from village cultural centres which serve as little more than bases for choirs that keep up folk singing and are attended largely by elderly women, via more active cultural centres running children's dance groups, brass bands or Art schools and playing an important part in planning local festivals, to large cultural institutions such as the *Ságlásie*

⁶³ NSI data, published on 28 April 2006.

⁶⁴ www.nsi.bg/SocialActivities/Clubs05.htm; see also NSI: *Bálgarija 2005. Socialno-íkonomiĉesko razvítie*. Sofia 2006, p. 83.

⁶⁵ Such as celebration of anniversaries of public interest, author readings, discussions on various topics, fun events, country fairs, etc.

("Agreement") cultural centre in the city of Pleven. *Săglásie* has been founded in 1869. Today, it has a library with 230 000 volumes and a concert hall seating an audience of 400. Some particularly modern cultural centres are even active in the field of regional development, taking the initiative, for example, in the introduction of pedestrian traffic lights and wheelchair ramps. This is an exception, however. Because of lack of money, and the ageing of the rural population, many of the *čitališta* in smaller communities can only arrange minimal activities.

Data provided by the National Statistics Institute give some impression of *čitališta* activity (see Table 4.4). In 2005, the *čitališta* had about 2000 folklore groups, 1800 music groups and 1500 dance groups (folklore, music and dance often are intertwined, of course), 520 theatre groups and about 7500 other groups of various amateur activity. Additionally there were about 50 000 cultural events organised by the *čitališta*, not counted the activities of the aforesaid groups. Compared to this impressive number of cultural activities and events, the more specifically teaching branch of *čitališta* activity is less impressive: there were about 330 language courses, 440 music classes and 150 ballet classes all over Bulgaria.

In practice, most *čitališta* activities are in the field of folklore, music, culture and amateur hobbies. The vast majority of cultural centres that nominally exist offer only few real activities, largely because the ageing rural population makes little demand for their services. And, of course, there is not much money in rural areas to be spent on cultural activities. One estimate from an insider in June 2005 suggested that only about 2000 of the 2800 cultural centres were operating at all, in the traditional manner, and that a mere 200 to 300 had successfully transferred to modern ways of working and were finding new sources of additional funding (primarily from the EU and international organizations).

Funding. Cultural centres can be funded in various ways, from membership subscriptions, cultural events, renting out of premises, and donations. According to the legal provisions, cultural centres have to provide "basic local cultural facilities" free of charge. This applies to activities such as folk dance, singing, etc. They may charge fees for other provision, such as the use of the library, languages courses or of course vocational training, where this is offered. In practice, however, the largest proportion of *čitališta* budgets is accounted for by state grants (via the Ministry of Education) and the local authority which covers staff salaries. In 2005, the *čitališta* have spent about 35 million Leva (18 million Euro), of which 14 million Leva (7 million Euro) were staff salaries. Revenues in 2005 were 36,5

million Leva (18,7 million Euro), of which 27 million Leva (13,8 mio. Euro) were provided by the state budget, and 2,3 million Leva (1,2 million Euro) were revenues from non commercial (cultural etc.) activities. Such earnings were supported, until the beginning of 2007, by a general tax exemption for *čitálišta*, concerning their “core activities”. By accepting the state budget for 2007, the Bulgarian parliament now has abolished the respective section of the *Čítálišta* Act. On the other hand, the parliament has entitled local municipalities to impose taxes in order to support *čitálišta*. These changes are part of an overall process of decentralization, following EU requirements.

Some of the bigger cultural centres have also started applying for project funding from international organizations.

Independence. One important consideration in any assessment of the Bulgarian cultural centres is the degree to which they are tied to the local authorities. By law, cultural centres are independent of local government. Neither the mayor nor the local council may decide *ex officio* to open or close a cultural centre. In practice, however, the cultural centres are closely associated with local government, since they are usually funded almost exclusively by the local authority. Cultural centres need to have a good relationship with the mayor, for example, because an influential local politician can persuade businesses to provide support. The actual relations between the local authority and a cultural centre thus frequently have a crucial impact on whether local educational activities flourish or die. Ideally, the result is a division of labour, so that the local authority provides the funding and the cultural centre takes responsibility for arranging local cultural activities. There are cases, however, which have a strong flavour of corruption or nepotism. Under the Cultural Centres Act, for example, a *čitálište* may be established and fitted out by the local authority, but instead of running any visible activities, the premises may then be rented out to private companies. The board of management and staff of such “fictional” cultural centres nonetheless receive salaries – and one is little surprised when these turn out to be local councillors or other people close to local decision-makers. These morally if not legally dubious dealings are condemned by the representatives of the “genuine” cultural centres movement, but in practise they have few means of combating them.

Encouragement for Modernization from the “Čítálišta Project”. An international project launched in 2000 gave considerable impetus to the cultural centre system in Bulgaria. This was known as “Social Development and Civic Involvement”.

ment through the Cultural Centre Network”,⁶⁶ the “*Proékt čítališta*” for short, and it ran for three years until the end of 2004. It was sponsored by the Ministry of Education and funded by a series of international organizations (USAID, UNDP, MATRA), which contributed a combined total of 2.5 million US dollars.⁶⁷ A coordination office was set up in Sofia, with six regional offices in the provinces. The aim was to strengthen the role of cultural centres as traditional education centres in Bulgaria, and to modernize them so that they could make an input to regional development. The initiators sought support from the local authorities, NGOs and the regional economy. The project was a continuation of the project “Civic Involvement and Development in Bulgaria” (*Gráždansko učástie i razvítie v Bálgárijia*, 1997-2000), in which only 41 cultural centres took part, while 300 cultural centres were accepted as full members of the *Čítališta* Project. These were entitled to participate in all project activities and calls for tenders. Another 600 cultural centres had access to a restricted range of activities. The cultural centres taking part could apply for financial support for their activities. Modern methods of working in the cultural centre environment were also promoted by means of model projects. In addition, a training and advice system for cultural centres was introduced.

The vast majority of courses in the *Čítališta* Project were short-term, i.e., between 4 and 150 hours of tuition. They included courses on the teaching of vocational skills, and participants received the relevant certificate. These courses served chiefly to provide information about alternative forms of employment and to teach a basic knowledge of computing. However, there was also training in traditional craft trades, agriculture and services. These short courses were addressed primarily to the unemployed, people with no vocational training, the Roma minority and other “difficult cases”. A small number of the courses were long-term, i.e., over 300 hours of tuition, and aimed at a particular level of vocational qualification under the Bulgarian Vocational Education and Training Act.⁶⁸

⁶⁶ *Gráždansko razvítie i učástie črez mrézata na čítalištata*. See the project website of *Proékt čítališta* at www.chitalishte.bg.

⁶⁷ United States Agency for International Development (USAID), United Nations Development Program (UNDP), the Dutch programme MATRA for Civil Society in Eastern Europe: see www.minbuz.nl.

⁶⁸ See p. 65.

In addition, 25 “information centres” were set up in cultural centres, to provide the population in remote and backward regions with access to the Internet and computer courses. The *Čítališta* Project ended in 2004, but the office coordinating the project was transformed into an independent foundation which continues to work towards the same ends, and the range of cultural centres participating is no longer restricted. In principle, any cultural centre may join.⁶⁹ According to a survey of the capacity of cultural centres, those that are genuinely operating under the present difficult social and economic conditions have become providers of new forms of training and employment security.⁷⁰

Critics with a background in European adult education complain that most cultural centres still “meander about in the area of culture” and ought to move more towards vocational training. The emphasize on cultural activities is partly determined by their close association with the Ministry of Education. In order to become more involved in vocational inservice training, the *čitálišta* would need closer contacts with the Ministry of Labour and Social Policy.

Overall, however, the cultural centres are the primary points of contact for adult education in Bulgaria, firstly on account of their very wide distribution, and secondly because of the esteem in which they have been held without a break as the traditional providers of education and culture throughout the country.

4.9 Programmes to Promote Employment

In recent years, a big share of the adult education marked is dominated by courses to train or retrain unemployed, or to help people who are actually in employment sustain their employability for the future. There are many programmes and projects financed either by the Bulgarian government or via the Bulgarian government by international donors (the most important donor is the EU by its Phare programme), which aim at improving the employability of target groups such as youth, long term unemployed, women, people from ethnic minorities etc. for example, the National Employment Action Plan 2007 (*Nacionálen plan za*

⁶⁹ *Fondácia za razvítie „Čítálišta”*, based in Sofia. Website at www.chitalishte.bg

⁷⁰ R. Stajkova: *Kapacitétat na čítálištata za profesionálno obučenie, obrazovanie i vázpitanie – reálen i potenciálen resúr*s. Sofia 2004. The study analyses the project reports of 67 cultural centres taking part in the *Čítálišta* Project.

déjstvie po zaetosttá 2007) lists 53 such projects and programmes (those to be applied only in certain regions of the countries even not counted), from very small ones up to the 40 million leva programme “From Social Benefits to Ensuring Employment” (*Ot sociálni pómošti kám osigurjávane na zaétost*). Most of those programmes are managed by the Employment Agency (*Agéncija po zaetostta*) and its subdivisions (Employment offices). Not all of the programmes concentrate on training and qualification, but most have at least a training and qualification module.

Hence, the Employment Agency plays the main role in vocational training for the unemployed by commissioning courses from local education and training providers. In 2004 there were, according to a government report, about 32 000 unemployed participating in VET courses paid for by programmes that were managed by the Employment Agency. (Of these, about 14 500 had started a course in that year, the others continued from 2003.) Additionally, there were about 13 300 participants in courses for people who are actually employed, but were supposed to need support to sustain their employability.⁷¹ Thus, the overall number of participants was about 45 000. The Employment Agency spent about 27 million leva (13.8 million euros) on the programmes. About a third of the courses were actually provided by Vocational schools, Vocational *gimnázii* or Vocational colleges (about 14 000 participants). The remaining courses were largely held by licensed Vocational training centre (CPOs).⁷² Some also completed a placement in an enterprise.

Under the National Employment Action Plan 2005, about 36 300 unemployed (according to AE data) have participated in courses for vocational training (either for completing full scale vocational training, leading to a degree, or smaller courses). Thus, about 8 per cent of all unemployed were included in the programmes. (In 2005, the average number of registered unemployed was 424 400, 64.5 per cent of them were without a vocational qualification). The Employment Agency says that 73.8 per cent of the participants immediately after the course, or a short time after it, got an employment. Training programmes normally are sup-

⁷¹ Ministerstvo na truda i socialna politika: *Vtori doklad za napredáka na R Bálgarija po izpálnenie na prioritetite po sávmeštjnija doklad na za ocenka na prioritetite v politika po zaetostta na Bálgarija*. (www.mlsp.government.bg/bg/docs/Second%20PIR-Bg.doc, accessed at 10 April 2007)

⁷² CPOs are explained in detail in Section 4.3 from p. 185.

posed to end with a three months internship in a company. The participants get a the legal minimal wage in this time, paid via the Employment Agency.

In 2006 the number of such participants was 42 000 according to a press release of the Ministry of Labour and Social Policy.⁷³

The most important target group of the programmes are young adults. In 2005, 47.9 per cent of the participants were 29 years of age or younger. 4.5 per cent belonged to the target group of people over 55 years of age. 67.9 per cent of the participants were women. 55.6 per cent had completed secondary education (*srédno obrazovanie*), 16.3 per cent higher education. The most frequent training were computer courses, and trainings for cooks, pastry cooks, accountants, hairdressers, bakery workers, waiters and bartenders. Foreign languages is a constantly important subject as well.⁷⁴

Another activity line of the Employment Agency takes place in co-operation with employers. In 2005, for example, the Agency organised training courses for about 5300 employees of micro and small enterprises, basically when the companies changed or reduced their production. This kind of training is financed one half each by the state budget and by the companies themselves. Training providers are chosen by way of a tender or just by the company in question.

In its reports, the Employment Agency states that most of the programmes and projects run effectively. Some experts in the field however think, that a lot of the trainings or not very effective, sometimes due to lack of motivation of the participants, sometimes due to inappropriate forms of teaching, such as ex-cathedra teaching without active participation of the course attendants.

4.10 Miscellaneous Associations and Organizations

The following section provides an overview of the part played by associations / organizations in adult education in Bulgaria during the last year, i.e. up until 2005/2006, where this has not already been covered.

⁷³ "Arbeitslosenrate weiter gefallen", Bulgarisches Wirtschaftsblatt, August 2006, p. 11.

⁷⁴ All figures here were communicated to us in late 2006 by the NSI.

Terminology. At present, Bulgarian legislation recognises various kinds of association. These are currently known by an overlapping set of descriptions, which sometimes leads to misunderstandings. Details can be found in the Appendix from p. 300. For short, the following terminology is used in this book:

- **NPO:** associations as defined in Bulgarian law, namely *fondácii* (foundations) and *sdruženija* (associations), governed by the Associations Act (*Zakón za juridičeskite licá s néstopánska cel*). They can additionally be officially recognized as being of public benefit.
- **NGO:** NGOs in the accepted international sense, regardless of their legal status in Bulgaria or elsewhere
- **Cultural centre:** *čitálišta* as defined in Bulgarian law (*Zakón za národnite čitálišta*). These automatically also have the status of *juridičeski licá s néstopánska cel*.
- **Associations / organizations:** A portmanteau term covering NPOs and NGOs, but not cultural centres or religious communities. (Religious communities are registered using a completely different legal basis).

Number. It is difficult to say how many associations / organizations there are in Bulgaria since they are generally registered with the local courts. The Ministry of Justice only holds a central list of those associations / organizations which have been recognised as being of public benefit. The exact figure is made more complicated by the fact that many associations exist only for a limited time or do not carry out any real activities once they have been set up.

In recent years, a certain amount of information has been published about the number of associations / organizations in Bulgaria. As a rough guide it can be said that there are around 3000, only some of which are genuinely active, however. To these should in any case be added the 3500 or so cultural centres (*čitálišta*) which are largely similar in nature even though they have a quite different legal status.

4.10.1 The *Znánie* Associations

One of the largest networks of associations involved in adult education in Bulgaria is the “Federation of Societies for Support of Knowledge” (FSSK) which has its

headquarters in Sofia.⁷⁵ It is the umbrella organization for 30 regional associations that are generally registered as “associations for support of knowledge” plus the name of the locality.⁷⁶ They are usually called “*Znánie* associations” for short,⁷⁷ even though some of the individual member organizations go officially by other names.

The *Znánie* associations hark back to the member associations of the “Georgi Kirkov Society for the Dissemination of Scientific Knowledge” which was established in 1971, when the evening Party schools had served their purpose.⁷⁸ The role of the Georgi Kirkov Society was to support the work of the Communist Party through a variety of educational activities. Provision was expected to cover politics, social sciences, natural sciences, technology and economics, from a specifically Marxist-Leninist perspective. The course tutors and lecturers were generally academics, teachers and figures from public life, who were intended to share their professional knowledge with the general public. The name Georgi Kirkov referred to a celebrated communist popular speaker.

The present-day staff of the *Znánie* associations do not see themselves, however, as continuing any ideological inheritance. After the change of regime in the 1990s, the Georgi Kirkov Society ceased to exist for all practical purposes. The ideologues left the associations, and those who remained tried to come to terms with the new circumstances by building on experience in other countries. The new network which came into being is heavily influenced by the German Volkshochschulen. The *Znánie* associations are today registered as being of public benefit under Bulgarian law. From a legal point of view, however, they are the successors to the former associations that belonged to the Kirkov Society. This enabled them in the period after 1989 to protect their premises (offices and teaching rooms) from being taken over by others.

The Federation and its member associations provide a wide range of courses, seminars and other educational activities in such areas as languages and com-

⁷⁵ *Federácija na družestváta za razprostránenie na znánija*, but they use the English name as well. Website of the umbrella organisation at www.fssk-bg.org/index_bg.html.

⁷⁶ For example *Družestvó za rozprostránenie na znánie Vráca* in the town of Vraca. The regional member associations may also be known by names such as „*Družestvó Znánie Várna*“ in Varna or „*Družestvó Znánie za vsíčki* [„Knowledge for all“ society] in Burgás.

⁷⁷ Z in *Znánie* pronounced as in English, like z zebra.

⁷⁸ See in Chapter 1 the Section beginning on p. 52 for the activities of this society.

puting, business, book-keeping, banking, agriculture, tourism, culture, retraining, certification systems, vocational training and inservice training for teachers. Political continuing education covers courses on human rights, environmental protection, public service, etc.

Every year, the *Známie* associations run about 900 to 950 courses of varying length in various fields. The number of participants is between 13 000 and 14 000.⁷⁹ Some of the *Známie* associations have also been licensed by the National Agency for Vocational Education and Training NAPOO to run a vocational training centre (CPO). This entitles them to offer vocational courses and to issue the relevant certificates.

4.10.2 Associations of Engineers (NTS)

The associations of engineers (*Naúčno-techničeski sājúzi*, NTS, literally: scientific-technical associations), form another network. They are brought together under an umbrella federation, FNTS (*Federácija na naúčno-techničeskite sājúzi*).⁸⁰ The members of this federation and its member associations are not only engineers but also entrepreneurs, academics, farmers, technicians, students, etc. The Federation currently has 19 national and 33 regional associations,⁸¹ together with their subordinate organizations, societies, etc. The Federation thus has over 22 000 members throughout the country (as at May 2005).

This network goes back historically to the first associations of engineers founded in the late 19th and early 20th centuries in cities such as Sofia, Varna, Stara Zagora and Pernik. A central body, the Bulgarian Society of Engineers and Architects (*Bálgarsko inženérno-arxitéktno družestvo*, BIAD) was set up in Sofia in 1893. (Its headquarters near to the central post office is famous to the public even today, however, not because of the BIAD itself but rather because of a homonymous pop-folk night club in the basement of the building.) In the wake of social restructuring after the Second World War, the engineers' associations were trans-

⁷⁹ Information from www.fssk-bg.org/activities_bg.html.

⁸⁰ See the Federation's own website www.fnts-bg.org. The licence is published there, and can also be seen on the NAPOO website, www.navet.government.bg.

⁸¹ The national associations are known as *Naúčno-techničeski sājúzi* (NTS); the regional are called *teriotoriálni sdružénija na NTS*, *TS na NTS* for short.

formed into the network of scientific-technical associations (NTS) that was officially established in 1949 as the unified organization of engineers, technicians and allied professions and had over 300 000 members in its heyday in the early 1980s, spread across 3600 individual organizations.⁸²

From the mid-1960s, the NTS built up a network of “Houses of Science and Technology” in major cities (*dómove na naukata i téxníkata*, DNT), which served as headquarters for the regional organizations and were also well equipped to provide teaching and inservice training.

After the change of political regime in 1989, the strictly centralized organization of the NTS that had prevailed up until then became looser. The regional offices began to register as separate associations, partly with the intention of averting the threat of the state taking over their buildings (DNT). The umbrella organization FNTS has had its current name and form since the early 1990s.

Unlike other providers in the education and training market, FNTS enjoys the great advantage of having an established national network of member associations, each with its own “House of Science and Technology” (DNT), in the major cities. FNTS in Sofia also continues to occupy headquarters in a prime site in the city centre, right behind the National Theatre in a building at 108 Rakovski Street that was erected in 1930 by the then Association of Engineers and Architects.

FNTS takes part in the adult education market through its own vocational training centre (*Céntár za profesionálno obučenje*, CPO), which it decided to set up in 2002 in order to meet the new government requirements for independent providers of vocational training. In 2003, FNTS was awarded its CPO licence by the National Agency for Vocational Education and Training (NAPOO).⁸³ This licence in 2005 covered over 100 different occupations, largely in the area of technology, and recently also in agriculture and construction. Several others were added in late 2005. The centre expects heavy demand for training in agricultural occupations as a result of Bulgaria’s application to join the EU. The anticipated financial aid for farmers from the EU will require considerable knowledge or experience of application procedures, in which area FNTS sees a gap in the market. An important field of the Federation’s recent work was training for the construction indus-

⁸² *Enciklopedia Bǎlgarija*, Bd. 4, S. 508-509, s. v. „*Naučno-tehničeski sǎjuzi*”.

⁸³ Licence No. 200312074

try, associated with the job creation and regional development programme “Beautiful Bulgaria” (*Krasíva Bălgarija*), which provided work on public building projects (often to improve amenities) for the unemployed, particularly in provincial towns and cities, with the aim of initiating longer-term employment.⁸⁴

The courses are in principle organized independently by the member associations of FNTS. The role of the staff in the Sofia head office concerned with managing the CPO is to develop syllabuses and methodology, to develop international contacts, and to monitor quality. In the first year of actual operation of the CPO (2004), around 500 vocational courses, 200 languages courses and 400 other courses, generally short courses, were arranged by the Sofia head office and the total of 29 training establishments (*učébeni zvená*), with an enrolment of 13 500 learners, said FNTS officials in our interviews in 2005.

A typical course in the vocational training programme covers 300 to 360 hours of tuition. Either participants pay for courses themselves, or they are paid for by their employers, and experience to date suggests that the numbers of the two groups are about equal. It is noticeable that it is chiefly younger participants who pay their own costs, and that they are more interested in acquiring a formal qualification than older learners.

In addition to the “Houses of Science and Technology”, which offer FNTS and its member associations a clear advantage over the competition, FNTS also benefits from the fact that since it is the traditional professional association of engineers and technicians it enjoys a broad membership base, which can be tapped to provide teachers for its education and training activities.

Furthermore, the prominent place which the Federation used to enjoy in the economic and political system of the country still makes it easier for it to make contact with the Ministries that play an important part in education nationally. On the other hand, the traditions and age structure of the membership tend to hold back adaptation to modern requirements. In May 2005, the main difficulties mentioned by the staff of the CPO were the creation of an up-to-date programme of educa-

⁸⁴ Accordingly go government data (handed out to EU authorities in Mart 2006) in 2005 were working 5497 persons at objects run by the project „*Krasíva Bălgarija*“, 33 per cent of which were Roma.

tion and training to fit the EU, and the quest for European partners to take part in this.

4.10.3 International Organizations

Some of the larger international and Bulgarian organizations funding projects in the area of political continuing education were, in recent years, the European Union, the Open Society Institute⁸⁵, the Foundation for Reform of Local Government⁸⁶, the US Agency for International Development (USAID)⁸⁷, the Dutch *Samenwerkende Fondsen Midden- en Oost-Europa*⁸⁸, the United States Institute for Sustainable Communities⁸⁹, the Democratic Network programme sponsored by USAID, the Democratic Commission Small Grants Program run by the US Embassy in Sofia⁹⁰, the Roma Education Fund⁹¹ and the Bulgarian Government "Rehabilitation and Social Integration" programme⁹².

The projects funded by these organizations generally have the following aims:

- To promote tolerance and understanding between ethnic groups, races, nationalities, religions, cultures, groups from differing social backgrounds, minorities, etc., who may be the victims of discrimination
- To promote the civil society, i.e., active participation by all citizens in the community, and
- To promote the work of people with particular responsibilities in the public sector

⁸⁵ *Fondácija „otvóreno obštestvó“*, www.osi.bg.

⁸⁶ *Fondácija za refórma v méstnoto samoupravlénie*, FRMS, www.flgr.bg

⁸⁷ www.usaid.gov

⁸⁸ *Co-operating Netherlands Foundations for Central and Eastern Europe*, www.cooperatingnetherlandsfoundations.nl. From 2005 they are represented in Bulgaria by the Tulip Foundation (*Fondácija lále*), www.tulipfoundation.net

⁸⁹ www.iscvt.org

⁹⁰ www.usembassy.bg/embassy/demcom.html

⁹¹ www.romaeducationfund.hu

⁹² *Fond rekhabilitácija i sociálna integrácija pri Ministérszkija sávét*.

The implementation of these projects generally includes the following activities:

- Organizing seminars, conferences, lectures and courses for teachers, trainers, social workers, journalists and the general public, in order to make use of experience already gained in other regions and countries
- Publishing books and other materials to disseminate ideas such as tolerance, the values of the multicultural society, equal opportunities, human rights, etc.
- Organizing cultural, social and other events
- Influencing educational policy and practice, including syllabuses, teaching materials and methodology

It would be hardly possible to describe all activities that are funded or initiated by international donors in Bulgaria. Just by way of illustration, some projects are outlined below.

4.10.4 “Partners Bulgaria” Foundation

Supported by the United States Agency for International Development (USAID), the foundation *Partners Bulgaria* launched – as one of its activities – a programme for interethnic integration in Bulgaria in 2000. The aim of this programme was to influence the social situation of ethnic minorities in provincial towns by improving education, economy and civil society.⁹³ This programme is chiefly oriented to civil society development and conflict management, but it has some elements of political education as well.

The “Partners Bulgaria” foundation was set up in 1998 to develop a stable civil society in the country. It is part of the international network *Partners for Democratic Change* (www.partnersglobal.org), which is dedicated to the creation of stable civil society institutions and the prevention and peaceful resolution of conflicts.

The programme “Interethnic cooperation” (*Programa “mežduetničesko vzaimodejstvie”*) of “Partners Bulgaria” aims at ethnic integration and conflict management in local communities with mixed population. The programme started in 2000 in the town of Lom (at the Danube, with a big share of Roma living there). It was extended in 2001 to Kjustendil and Vidin, and later to Asenovgrad, Dupnica

⁹³ Bulgarian name: *Fondácija Partn’óri-Bălgárijia (FNB)*, www.partnersbg.org.

and Tărgoviște. In 2006 the programme was working in 13 Bulgarian cities with multi-ethnic population in the whole country. In these towns, a three-year programme was (or is being) implemented to help give some stability to the coexistence of ethnic communities and the majority population. The aim is that the local authorities, businesses, NGOs, education and culture should work together with respected people from the region. Hence, the programme relies on close partnership with representatives of local institutions, NGOs, companies, education and culture institutions, and official or non-official leaders of local communities and ethnic groups. The programme provides activities such as:

- Representatives of the various groups in each town are to draw up joint proposals for improvement of the social atmosphere locally (the principle of “cooperative planning”). These projects may be concerned with economic, educational or social issues. The best proposals will then be funded by the foundation.
- A leadership course (with 30 modules) will be run for people in leading formal or informal positions, and for young people from the minorities. The best participants will be trained as trainers for a tolerance programme.
- A reconciliation commission or “mediation centre” will be set up, and its members trained in conflict avoidance and out-of-court settlement procedures through mediation, reconciliation, etc. The commission is intended to observe public opinion, initiate “round tables” and discussions in the media, exchange information, resolve disputes and assist local authorities in solving problems.
- Capacity building for a local NGO network.

The foundation expects that these measures would improve relations between citizens and institutions, enhance educational opportunities for children and adults from different ethnic communities, raise the quality of social services, create new jobs and increase participation by citizens in public life.

4.10.5 “A Second Chance” Project for Adult Literacy

Another example of an NGO adult education initiative in Bulgaria is the “Second Chance – social integration through adult literacy” project. This was funded by the Phare “Social Integration” programme and implemented by the Institute for International Cooperation of the German Adult Education Association (*dvv interna-*

tional , Sofia office⁹⁴) The project was launched in May 2003 and had the aim of teaching unemployed Roma to read and write. To this end, ten three-month courses were organized in consultation with the Ministry of Education. These courses were held in local schools, which provided both accommodation and teachers. A total of 150 people aged between 16 and 25 years, living in four towns, attended the literacy programme. The teaching groups were no larger than 15 persons, and each course consisted of 300 hours of tuition (225 in reading and writing, and 75 in mathematics). Besides the teacher, each group had the services of a special assistant teacher, who was where possible a member of the Roma minority. The participants agreed to a “learning contract” and received an allowance for regular attendance at the course.

In 2006, *dvv international* continued this “Roma education” line of activities with a series two-years-courses for Roma who wanted to take a certificate of upper secondary education (*srédno obrazovanie*). These young adults, by definition, had some lower degree of school education. The teaching in a group of about 20 participants provides them within two years of learning with the complete contents of Years 9 to 12 of middle-level school education (*srédno obrazovanie*). On completion, they are awarded the standard middle education certificate. This is in practise an important “passport” to enter the labour market. All of the recent participants of the programme were from Stolipinovo, a huge Roma suburbia in the town of Plovdiv. As usual for *dvv international* projects, the idea is not to provide mass education, but to implement modern models of adult education and to show what is “good practice”.

As a result of the Second Chance project for illiterate adults mentioned above, *dvv international* is currently supporting the Ministry of Labour and Social Affairs to organize its own adult literacy programme (as part of the current national employment programmes). *dvv international* provides teachers involved in the programme with additional adult education methodology which is often at lack. By August 2006, *dvv international* had trained about 90 teachers which were to work for adult literacy programmes of the Bulgarian government. As Maria Todorova of the *dvv international* office in Sofia reports, about the half of them previously had been unemployed and returned, as a side effect of the programme, in employ-

⁹⁴ www.iizdvv-bg.org

ment, now as specialist for adult literacy awarded with a special certificate on adult education methodology.

More information on the work of *dvv international* in Bulgaria concerning general support to adult education development can be read in the internet at www.iizdvv-bg.org, the homepage of the Bulgarian *dvv* branch, or from www.inebis.org, the website presenting *dvv international's* South East European activities, or from Another outcome of the Second Chance project. A 50 pages report on *dvv* activities in South East Europe 2000-2006 is available as well.⁹⁵

4.10.6 National Programme for Adult Literacy and Qualification of Roma

Based on the experiences by the Second Chance project (see above), Bulgarian government implemented in 2006/2007 a much broader programme, called the "National Programme for Adult Literacy and Qualification of Roma" (*Nacionálna prográma za ogramotjávane i kvalifikácija na rómi*). The overall aim of the project was to support the employability of illiterate and unemployed adults. Since adult illiteracy is a problem chiefly of the Roma minority in Bulgaria, almost all participants were Roma. However, ethnic self-definition was not a precondition. The project used a double approach, comprising an adult literacy module (held in 2006) and, as a second step, a vocational education (VET) module, to be finished by late 2007. When the project was finished in late 2007, about 2500 young had achieved literacy and had improved their employment chances by vocational training. Courses had been held all over the country. To this end, the programme combined the efforts of the Ministry of Social Policy, the Ministry of Education, the Employment Agency and its local sections, the municipalities, the school authorities and NGOs. *dvv international* was responsible to train the teachers and course providers in adult education methods.

The overall objective of the project was to enhance the employability of the target group. Further objectives of the project were

- To help the participants develop a pro-active approach of labour market integration
- To improve the quality of adult literacy courses throughout the country by implementing advanced programmes, teaching materials and experience from other countries.
- Improving the co-

⁹⁵ Address: www.iizdvv-bg.org/materials/IIZDVV_in_SOE_2006.pdf

operation between the relevant Ministries, the Employment Agency and the civil society sector.

The participants had to be registered as unemployed with the Employment Agency. They could be up to 29 years of age. The adult literacy module lasted five months, comprising 600 teaching lessons for each of the participants. The local offices of the Employment Agency (*bjura po trudá*) cared for recruitment and motivation of the participants. For the VET module, the respective provisions of the Vocational Education and Training Act (ZPOO) were used. Courses were held by the usual VET providers. Participants could enter the VET module after having successfully completed the literacy course.

Important steps of the project implementation were: ● To inform the target group about the programme. ● To set up the necessary teaching materials ● To find participants, to motivate them and to keep them motivated ● To hold the proper adult literacy courses and, later, the VET courses ● To integrate the social partners, the district and municipality administration, NGOs and government bodies into the project.

According to the project plan, the adult literacy module had a budget of 1.65 million leva (that is 660 leva or 320 Euro for each of the planned 2500 participants). VET courses were additionally financed by the appropriate regular state programmes (in compliance with s. 63 of the Employment Promotion Act). 17 000 leva were the contribution of *dvv international*.

4.10.7 Development Programme of the National Council for Cooperation in Ethnic and Demographic Affairs

A further example is the project “Urbanization and Social Development of Regions with a Predominance of Minority Populations”⁹⁶. This is officially run by the “Council for Cooperation in Ethnic and Demographic Affairs”, a mere conciliary assembly to the Cabinet.⁹⁷ Hence, the project is actually a government pro-

⁹⁶ *Urbanizácia i sociálno rozvítie na rajóni s prevládavašto malcínstveno naselénie.*

⁹⁷ *Nacionálen sávét za sátrudničestvo po etníčeski i demográfski vâprósi (NSSEDV) kâm Ministérski sávét.* – The council was created in late 2004. It meets several times a year in order to discuss new legislation etc. Its chairman was at first a minister without portefeuille, and now one of the vice minister presidents. Members are vice ministers of the 12 minis-

gramme, not a civil society initiative. It is funded by the Bulgarian Government, the UN Development Program (UNDP) and the EU support programme for candidate countries (Phare 2002) with an budget of around six million Euro. The overall aim is to improve living conditions in regions inhabited predominantly by minorities. The main objectives are job creation and the promotion of social integration.

The project works in three directions. Firstly, permanent jobs are to be created with the help of local employers. Secondly, the unemployed are to receive vocational training. The special nature of this vocational training is associated with the object of the third project activity: the creation and development of a technological and social infrastructure which will also create at least temporary jobs. The vocational training takes place in collaboration with the employment offices. The project funds 50 courses for jobs in the construction industry, each with 20 participants from the minorities. While the courses are running, all participants receive an allowance and in some cases travel expenses. Motivated participants are selected by interview at the local employment office. Those successfully completing the course receive a certificate of vocational skills. The number and types of courses in each area are determined by local need (structure of unemployment and infrastructure facilities). A total of 1000 Roma are expected to gain simple vocational training and a formal qualification in this way. The towns comprised in the project are Pazardžik, Stara Zagora, Lom, Omurtag, Dulovo and Venec – all small or medium towns.

4.10.8 Projects Financed by the Roma Education Fund

The Roma Education Fund (REF) with a headquarters in Budapest has been set up as a result of a conference of South East European Countries (Bulgaria, Croatia, Czech Republic, Hungary, Macedonia, Romania, Serbia and Montenegro, and Slovakia.), the World Bank, the Open Society Institute, the European Commission, UNDP, the Council of Europe Development Bank and the governments of Hungary, Finland and Sweden, in connection with the plan to establish a interna-

tries, representatives of the National Statistics Institute, the five state agencies, the Bulgarian academy of Science, the Municipalities' association, of NGOs and practitioners working in the minority and ethnic sector.

tional “Decade of Roma Inclusion 2005-2015”. In 2005, the REF was registered as a Swiss Foundation, in 2006 additionally as a Hungarian Foundation. For the period 2006-2015, REF expects about 34 million euros from its donors. The goal of the Roma Education Fund is to contribute to closing the gap in educational outcomes between Roma and non-Roma, through policies and programs to support quality education for Roma including desegregation of educational systems. In 2005 and 2006, REF received 62 project applications only from Bulgaria (the overall number of applications was 197) and contracted 18 of them.⁹⁸ The list of projects accepted through March 2007⁹⁹ comprises 37 projects in Bulgaria with an overall funding of 1,8 million euros. The bulk of these projects focuses integration of Roma children into school education. In the list, one projects explicitly uses an adult education approach: A consortium of Roma NGOs in co-operation with the Faculty of Preschool and Primary School Pedagogy and Faculty of Pedagogy of the Sofia University, plan to establish an intercultural education centre at Sofia University, to institutionalize training for pedagogical personnel who work with Roma children and students. The centre is meant to increase the quality of education of Roma students by allowing for qualification and requalification of the pedagogical personnel.¹⁰⁰

Another project from the 2007 list, awarded with about 120 000 Euro, is called “National centre for Qualification of Teachers for Education and Integration of Roma pupils”, organised by the *Pedagogical College Sv. Ivan Rilski* and the NGO *Future for the Roma People*, both from the provincial town of Dupnica, between Sofia and Blagoevgrad. They want to pilot a “model for the introduction of obligatory qualification of teachers in multicultural education”, lobby for legislative changes to define better the status of teachers working with Roma children and provide stimulus for their professional development and advancement. As part of the programme, 160 teachers from 15 kindergartens and 15 elementary schools in the municipalities of the region around Dupnica (Boboševo, Rila, Kočerino and Sapareva Banja) shall be trained.¹⁰¹

⁹⁸ Roma Education Fund: Annual Report 2005-2006, p. 45 ff. www.romaeducationfund.hu/documents/AR_for_web.pdf, accessed on 23 April 2007.

⁹⁹ www.romaeducationfund.hu/documents/Annex_2.doc, accessed on 23 April 2007.

¹⁰⁰ Project BU 040 22/06/06 from the list cited above.

¹⁰¹ Project BU 019 05/12/06 from the list cited above.

In the 2005-2006 annual report, REF gives presents its own current considerations on adult education as a means to support Roma integration in South East European countries: "For second-chance education and vocational education, it is much more difficult to find appropriate solutions and to ensure a common view about what is a best practice and what should be scaled up or extended. This problem is compounded by the fact that vocational training is, on average, of low quality in the region and with limited impact on the labour market. The REF has financed three projects in this field, but they all have difficulties in making a clear impact on opening access to the labour market for the Roma who have been going through the programmes. the question is whether adult education should focus on catching up on general education, to help young adults get at least a general education degree, or it should focus more on getting some employment skills. Certainly, a clear benefit of young and older adults going back to school is that they become much more sensitized to the education of their own children."

4.11 Summary

In conclusion, some of the features of the existing system of non-formal adult education in Bulgaria may be summarized as follows:

- **Participation by the population** aged between 16 and 24 years is very low overall: merely 1.7 per cent.
- For the **institutions of the formal education system** (Vocational schools, Vocational *gimnázii* and Vocational colleges), continuing education is a new field which still faces serious organizational and financial problems.
- **University education** is held in high esteem, but it should move away from the traditional image of the student towards lifelong learning, for example by networking with regional employers and other educational institutions in order to be in a position to respond flexibly to changing needs. Moves in this direction are already visible. A reform programme for higher education is currently (2006) under work.
- **Vocational inservice training organized by enterprises themselves** is underdeveloped by comparison with the countries of the European Union. Only a third of enterprises provide inservice training, and course participants account for only 11 per cent of those in employment. There are many reasons for this.

The most significant is that employers underestimate the importance of inservice training.

- The **cultural centres** (*čitálišta*) have considerable potential for organizing courses, especially in small and remote settlements. They are highly accepted by people as institutions of education and culture. But this potential is not yet being exploited in many places.
- **Other associations / organizations** play an important part in adult education since they are the channels for the implementation of numerous international projects to promote education and training for various sections of Bulgarian society. Programmes for the Roma minority are especially widespread, since they are in particular need of education, and money for such projects is easy to obtain from international donors.
- **Established networks** for educational activities are provided by the cultural centres (*čitálišta*) and the *Znánie* associations, which offer education in the broad sense, and by the Federation of Associations of Engineers (FNTS), which is well placed to deliver vocational preservice and inservice training in particular.
- The **craft trades** are struggling to re-introduce the traditional pattern of apprenticeship training, but even though a special Trades Act has been passed to ease the way, many crucial questions remain unanswered. There is also criticism that the apprenticeships proposed are no longer what is needed by small enterprises because they do not cover the necessary breadth of activities. This debate is only just beginning in Bulgaria.
- The **trade unions** began their educational activities with internal training courses, but are now expanding into general vocational training. Depending on political developments in Bulgaria, they may become a more important player in the education and training sector.
- The new **licensed Vocational Training Centres (CPOs)** are a way of decentralizing vocational training and responding to the flexibility of the market while still exercising some state control (through NAPOO). However, it is not yet clear whether the intended high standards of quality will be maintained or will gradually succumb to political constraints. At present, the individual operators of vocational training centres appear to be suffering from course megalomania, as

certain insiders put it. Preparation is offered for dozens of occupations, for which there are insufficient equipment and specialist knowledge, critics argue.

The fundamental question of who should be responsible for vocational training has now been resolved after a lengthy process of discussion about the alignment of the Bulgarian education system with the requirements of the EU. To put it crudely, initial vocational education is a matter for the Ministry of Education, while the Ministry of Labour, and its subsidiary agencies, take care of vocational continuing education and training. This arrangement has been reflected in various laws (Vocational Education and Training Act, Employment Promotion Act).

One unresolved question is what separate institutions should be created for initial vocational education or training, and for continuing vocational education and training – and whether this is in fact desirable. In principle it should be a logical consequence of the division outlined above to keep the two separate. In the opinion of many specialists, this would also accord both with experience and best practice in many EU countries, and with Bulgarian traditions. Experience shows that it is more effective to establish quite distinct institutions for the different sectors of vocational education and training (initial preservice education, and vocational adult education). However, the question is not yet finally decided since it is still unclear in which direction the state vocational schools will go. Will they open up to the adult education market, or will they concentrate on their core business, initial training for young people?

5 Users of Adult Education

Having focused so far on the providers of adult education in Bulgaria, we now turn to the users. What is the take-up of provision? What kinds of adults take part, how well are they integrated into the education system, and where are the gaps? The chapter is based mostly on studies of the Bulgarian National Statistics Institute (NSI) and of its European counterpart Eurostat. Statistical data are based on interview surveys with questions such as “During the last 12 months did you attend any qualification courses, seminars, conferences, lectures or receive private lessons or some other training outside the regular education system?” Thus, the data show what people think (and say) about their own lifelong learning behaviour.

5.1 Lifelong Learning Activities of Adults

“Lifelong learning” is a concept broadly used in European education politics. It encompasses learning for personal, civic and social purposes as well as for employment-related purposes, independent of where it takes place: in the formal (traditional) education system or elsewhere.¹ The following figures from the Bulgarian National Statistics Institute revolve around such lifelong learning activities, undertaken by people of working age.

Most data refer to the year 2003, when a special study on Lifelong learning was conducted only in Bulgaria² but in the whole European Union.³ The method used was to measure participation in learning activities as the proportion of persons aged between 25 and 64 years taking part in the twelve months before the study in any type of education, training or learning, i.e. in at least one of formal, non-formal or self-directed learning.

¹ For a more precise explanation what is meant in European education policy by “Lifelong learning” see p. 320.

² NSI: Lifelong learning, 2003.

³ The Lifelong learning (LLL) data base’s target population were persons in private households aged 25-64 years. The first priority of the survey was to measure participation and volume of lifelong learning. The survey was carried out as an ad hoc module to the EU Labour Force Survey (LFS).

(Another set of data for Bulgaria, which is used below, shows participation in educational activities by Bulgarians aged 15 and over, with no upper age limit. Unlike the data for 25 to 64 years old, these cannot be compared with European data.)

According to the study of Lifelong learning by the Bulgarian National Statistics Institute for the year 2003, 16.1 per cent of Bulgarians aged 25 to 64 years took part in activities covered by the notion of Lifelong learning (Table 5.1). This was more than in Romania (10 per cent), but by far below EU25 average (40 per cent) and the figures for single EU countries as the UK (37.6 per cent), Germany (41.9 per cent) or Austria (89.2 per cent). In an European comparison, this clearly shows that participation in educational activities by the Bulgarian population is low. As the study shows, the vast majority of the population of working age did not take part in any form of formal or non-formal education or training, and did not use self-learning.

Table 5.1

Participation in Lifelong learning (any activities) by age and gender (2003), percentages, Bulgaria and EU 25 in comparison ⁴									
Age	All those aged 15 years and over			Age group 25-64 years					
	Total	Men	Women	Total		Men		Women	
	Bulgaria			BG	EU25	BG	EU25	BG	EU25
15-24	58.8	57.0	60.5	--	--	--	--	--	--
25-34	21.6	20.3	22.9	21.6	50.2	20.3	50.5	22.9	49.9
35-44	19.4	17.0	21.9	19.4	45.0	17.0	45.4	21.9	44.5
45-54	15.9	14.0	17.6	15.9	40.3	14.0	41.2	17.6	39.5
55-64	6.5	7.0	6.1	6.5	29.5	7.0	31.3	6.1	27.7
65+	1.3	1.9	0.8	--	--	--	--	--	--
Total	19.9	19.6	20.2	16.1	42.0	15.0	42.8	17.3	41.1

⁴ Data from NSI Lifelong Learning 2003 and from Eurostat database, table trng_any1, accessed in January 2007.

Participation in educational activities by younger people aged 15 to 24 years in Bulgaria was 59 per cent. This is pretty more than the 16.1 per cent of the older adults, but on the other hand, this also means that around 625 000 young people were not taking part in any educational activities. For Lifelong learning policies, this means that they need to be motivated and encouraged.

Gender and age. Women participate more in educational activities than men. Differences between the genders can be observed both among adults of working age (25 to 64 years) and among young people and young adults (15 to 24 years of age). Among people aged 45 years and over, participation in educational activities declines sharply and reaches its lowest level (6.5 per cent) in the age group 55 years and over. EU25 average in all these figures is about two to three times higher, as can be seen in Table 5.1.

Table 5.2

Participation in educational activities (overall) by level of education and employment status (2003), percentages, Bulgaria and EU25								
Level of education	Age group 25-64 years							
	Total		Employed		Unemployed		Inactive	
	BG	EU25	BG	EU25	BG	EU25	BG	EU25
Tertiary (ISCED 5 and 6)	45.2	68.7	51.6	71.2	31.7	67.2	17.8	51.5
Secondary (ISCED 3 and 4)	12.2	44.2	13.9	46.8	10.6	45.2	7.9	34.5
Lower (ISCED 2 or below)	1.8	23.1	2.9	27.0	?	25.3	1.0	17.3
Total	16.1	42.5	22.1	48.0	10.6	40.6	5.7	27.5

Level of education. There is a strong correlation between level of previous education and continuing educational activity (Table 5.2). Participation in educational activities by those who have completed higher education is three times as high (45.2 per cent for the age group 25 to 64 years) as among those who only completed upper secondary education (12 per cent). A difference is also apparent between the different levels of vocational upper secondary education. Those who completed Level 3 of vocational education are more active (14 per cent) than those who completed Level 2 (10 per cent). The lower the level of education, the

larger the discrepancy with EU25 average. For example, people with completed secondary education in an EU25 average participate by 68.7 per cent in any educational activity, in Bulgaria 45.2 per cent. People with completed secondary education as highest educational level participate by 44.2 per cent in EU25, but only by 12.2 per cent in Bulgaria.

Unemployed / employed. Employment status has a considerable influence on people’s educational activity (again Table 5.2). Participation by those in employment (22 per cent) is twice as high as among the unemployed (11 per cent) and nearly four times as high as among the non-working population⁵ (5.7 per cent). Comparison with EU25 data, however, shows again that Bulgaria is far behind, usually by a factor of 2 or 3 or even more. (See for this the BG-EU25 comparative figures in Table 5.2.)

Urban / rural. Place of residence is a factor which has a crucial impact on people’s motivation to take part in educational activities. Participation among those in employment living in towns and cities is 26 per cent, three times as high as participation among those in employment living in rural areas. The differences between the unemployed living in urban and rural areas are equally marked. In towns and cities, 13 per cent of the unemployed take part in educational activities, while this figure is only just over 4 per cent in rural areas. The non-working population and those living in rural areas show the lowest participation in educational activities, only 1.7 per cent. Their passive behaviour restricts their likelihood of future employment. However, the fact that there are far fewer opportunities for education and training in rural areas should also not be forgotten.

Table 5.3

Participation by the population aged 25 to 64 years in educational activities (2003) by labour force status and category of local unit, percentages					
	Overall	Labour force			Non-working population
		Overall	Employed	Unemployed	
Overall	16.1	20.7	22.1	10.6	5.7
Urban	20.2	24.6	26.1	13.4	8.0
Rural	5.7	8.3	9.1	3.5	1.7

⁵ Those not working or seeking work.

5.2 Adult Learners in the Formal Education System

The following section shows the degree to which those of working age (25 to 64 years of age) in Bulgaria use the *formal education system*, or in other words, to what extent the traditional schools system is open to people of non typical school age.

Table 5.4

Participation by the population aged 25 to 64 years in formal educational activities by gender, age and educational qualification (2003) ⁶			
	Total	Men	Women
General education ISCED 1, 2, 3	0.01 %	0.02 %	0.01 %
Vocational education ISCED 2, 3, 4	0.02 %	0.03 %	0.02 %
Tertiary education ISCED 5, 6	1.4 %	1.4 %	1.5 %
Total	1.5 %	1.4 %	1.5 %

The figures show that Bulgaria is, in this concern, well behind the European average. According to NSI data, participation in formal education by the population aged 30 years and over in the 15 Member States of the European Union in 2003 amounted to 2.5 per cent, but in Bulgaria it was only 0.4 per cent (Germany: 0.8 per cent).⁷ There is no appreciable difference between the genders: 1.4 per cent among men, and 1.5 per cent among women. This applies to all forms of school education and training and to higher education, see Table 5.4.

Table 5.8 shows Eurostat data on participation of adults in formal education, by age groups. For comparison we have added the figures for Denmark, since Denmark is supposed to have a very well developed education system, particularly concerning adult education. Bulgaria again is pretty well behind with a total participation of 1.2 per cent, whereas the EU25 average is 4.5 per cent, and Denmark has 7.7 per cent.

⁶ Data from NSI Lifelong Learning, 2003.

⁷ Although Bulgarian figures are based on the age group 25 and over, not 30 and over.

Table 5.5

Participation in formal education by age groups, in 2003, (percentages) Bulgaria, EU25 and Denmark ⁸			
Age group	EU25	Denmark	Bulgaria
Total	4.5	7.7	1.2
25-34	10.7	20.6	3.9
35-44	3.6	6.2	0.7
45-54	2.1	2.9	0.5
55-64	0.9	1.0	-

5.2.1 Adult Learners in the Traditional School System

Since programmes of formal education (i. e. the traditional school system) are initially created for young people (namely those of typical school and student age, between 7 and 24 years), adult participants tend to be an exception there. Particularly in the lower stages of education, they are only a handful of cases, in Bulgaria and elsewhere.⁹ Inside the traditional Bulgarian education system, **vocational education and training for adults** at ISCED Levels 1, 2 and 3 are provided in a few schools such as the schools in prisons. Additionally, some general and Vocational schools and *gimnázii* offer evening courses and distance learning for adults. The number of participants is far from considerable.

The following approximate numbers of adults aged 25 years and over were enrolled (students in the traditional form) in 2003/2004:

In general education schools	600
In special schools (<i>speciálni učilišta</i>) ¹⁰	25

⁸ Eurostat data base table trng_fed1, accessed on 17 April 2007. The data refer to 2003.

⁹ However, one might argue that especially Bulgaria with its high percentage of illiterate adults from minority groups would need much more adult literacy courses provided by local schools.

¹⁰ The term "*speciálni učilišta*" (special schools) is generally taken in Bulgaria to mean schools for children whose education makes special pedagogical demands – schools for those with mental disabilities, hearing loss, behavioural disturbances, etc. The few prison

In Vocational Schools and Vocational <i>gimnázii</i> (<i>profesionální učilišta, profesionální gimnázii</i>)	300
In Vocational Colleges (<i>profesionální koléži</i>)	1000

People of working age may currently take continuing courses at ISCED Levels 4C in 13 Vocational colleges (*profesionální koléži*), and at Levels 5A and 6 in 50 colleges of vocational higher education (*koléži*),¹¹ 41 of them attached to university-type institutions, the remaining 9 being independently organised.¹²

Courses for ISCED Levels 1, 2, 3 and 4 of the formal education system use the same teaching programmes. There are no special programmes for the vocational training of adults, when they enrol in normal schools. Upon successful completion of the course, every student receives the same certificate of the appropriate level of general education plus the vocational qualification attained, regardless of age.

5.2.2 In Courses Leading to a VET Degree, Outside Traditional School Attendance

School enrolment of the traditional form is not the only way how adults can take a degree from a school. Especially the vocational schools (chiefly Vocational *gimnázii* and Vocational colleges) have started, although not very impetuously, to enter the education market and to offer their services for money. Unlike other education providers, they do not need a special licence for this.

As shown above in Chapter 4, Vocational *gimnázii*, Vocational Schools and Vocational Colleges (*profesionální koléži*) altogether had, in 2006, exactly 1323 enrolments for courses (outside the traditional task of the schools) leading to a certificate Level 1, 2 or 3 of the national VET system. They have issued in that year 1060 such certificates.¹³ This is not overwhelmingly much, particularly when com-

schools are also counted as special schools. The 25 people shown here were attending such facilities in prisons.

¹¹ For the distinctions between different types of school and higher education institution see the list beginning on page 57 and the list of Bulgarian terms from p. 300.

¹² Figures for the academic year 2005/2005.

¹³ See Table 4.1 on p. 179.

pared with the number of participants in courses for VET Level 1, 2 and 3 offered by the newcomer in the education system, the Vocational Training Centres (CPO). CPOs had 11600 enrolments and about 10700 degrees issued in 2006.¹⁴ (These figures do not count courses that are too short to lead to a certificate of VET Level 1, 2 or 3. In fact, such courses are the core business of the CPO, whereas full VET Level 1, 2 or 3 courses are the exception.)

5.2.3 In Higher Education Institutions

Relatively many people of working age (25-64 years of age) are enrolled in university type institutions. This is not really surprising since university students in Europe are right normally aged between 20 and 30 years of age, and thus a considerable deal of them is aged 25 and more. In Bulgaria, in 2003/2004, there were about 53 000 such students on Bachelor's and Master's courses, 3900 in independent colleges of vocational higher education and vocational university courses (*koléži*), and just over 4600 studying for doctorates. Thus, a total of around 63 300 students aged between 25 and 64 years were enrolled in the formal education system, accounting for 1.5 per cent of the population of that age, and 5.1 per cent of the learners (Table 5.4).¹⁵ (The overall number of students (without respect to age) in ISCED 5 and 6 in Bulgaria was 228 000 in 2003/2004 and 243 000 in 2005/2006).

5.3 Adult Learners Participating in Non-formal Education

Learning activities which take place alongside the formal (traditional) school system but anyway are structured in terms of objectives, learning time, etc, are usually called non-formal learning.¹⁶ In this section we show data on adults (those of working age) participation in such non-formal education activities. Here as well, Bulgarian figures reveal a yet strong potential for development, particularly when compared with the results of similar studies in EU countries. Table 5.6 shows participation in non-formal education by the population aged 25 to 64 years. As can be seen, the overwhelming majority of Bulgarians of conventional working

¹⁴ See Table 4.2 on p. 189.

¹⁵ The figures represent the relationship between the number of learners and the total number in the age group in question.

¹⁶ For a more precise definition see Appendix, p. 319.

age between 25 and 64 years take no part in non-formal learning activities. Or at least, they have responded to the interviewers in 2003 in that way. According to the study of lifelong learning by the Bulgarian National Statistics Institute for 2003, only 1.7 per cent of Bulgarians aged between 25 and 64 years took up any form of non-formal education or training provision in the year preceding the study.

Table 5.6

Percentage of population having participated in non-formal education during the last 12 months prior to the survey (2003) ¹⁷					
Age	EU25	Denmark	Switzerland	Bulgaria	Romania
25-34	19.8	47.3	55.2	2.7	1.0
35-44	19.2	52.2	56.5	2.1	0.5
45-54	16.5	50.2	55.3	1.3	0.6
55-64	8.5	37.1	43.8	-	0.2
Total	16.5	47.1	53.3	1.7	0.6

Table 5.7

Participation in non-formal education by gender and age in Bulgaria (2003) ¹⁸						
Age	Number in 1000s			Percentage of population		
	Overall	Men	Women	Overall	Men	Women
25-34	29.6	12.7	16.9	2.7	2.3	3.2
35-44	22.4	9.4	13.0	2.1	1.8	2.4
45-54	14.7	5.3	9.4	1.3	0.9	1.6
55-64	4.0	2.2	1.8	0.4	0.5	0.4
Overall	70.5	29.5	41.1	1.7	1.4	1.9

Broken down by age groups, the data show that younger adults aged from 25 to 34 years in Bulgaria are most likely to take part in non-formal education (2.7 per

¹⁷ Eurostat data base table trng_nfe1, accessed in April 2007.

¹⁸ NSI: Labour Force Survey

cent). With advancing age, the rate of participation declines equally among men and women (Table 5.7) whereas in more developed countries (see Table 5.8) the percentage either is similar throughout the age groups (Switzerland) or even rises (Denmark).

Differences between men and women in respect of participation in non-formal education in Bulgarian are not appreciable. Place of residence, however, does have a significant influence on people's participation in non-formal education. People aged 25 to 64 years who are living in towns and cities are four times as likely to take part in such provision (2.1 per cent of the urban population) as those living in villages (0.5 per cent of the rural population).

Table 5.8

Participation by the population aged 25 to 64 years in non-formal educational activities by gender and place of residence (2003) ¹⁹			
	Overall	Men	Women
Urban	2.1	1.8	2.4
Rural	0.5	0.4	0.6
Overall	1.7	1.4	1.9

Table 5.9

Participation by the population aged 25 to 64 years in non-formal education (2003) by gender and level of education in Bulgaria (2003) ²⁰						
Level of education	Number in 1000s			Percentage		
	Overall	Men	Women	Overall	Men	Women
Tertiary (ISCED 5 and 6)	38.9	14.1	24.8	4.3	4.0	4.5
Secondary (ISCED 3 and 4)	29.6	13.9	15.8	1.4	1.2	1.6
Lower Secondary (ISCED 2) or below	2.0	1.5	0.5	0.2	0.2	0.1
Total	70.5	29.5	41.1	1.7	1.4	1.9

¹⁹ NSI: Live Long Learning, 2003

²⁰ Idem.

Level of education also has an effect on participation in non-formal education. Participation by people who have completed higher education is 4.3 per cent. This may be low, but it is appreciably higher than among those who have completed upper secondary education (1.4 per cent). People who have only completed eight-year basic education or have an even lower level of education are even less likely to take part (Table 5.9). Their level of participation is so low that it can barely be expressed in reliable figures because of stochastic uncertainties. In practice, almost 97 per cent of participants in non-formal education have completed higher or at least upper secondary “middle” education (*sredno obrazovanie*).

The data available on participation in educational activities by the population aged 15 years and over²¹ show some further peculiarities:

- The amount of time devoted to non-formal education is relatively high: every person taking part in non-formal education in the year preceding the study had an average of 84 hours of tuition.
- Participation in non-formal education was in most cases (60 per cent) associated with a current or prospective job. The remaining 40 per cent were taking part in continuing education for personal or social reasons.
- The largest numbers of participants motivated by employment were found in science, mathematics and computing (20 per cent), followed by social sciences, economics and law (18 per cent) and foreign languages (15 per cent).
- Among participants in foreign language courses, purely private motivation was relatively common (28 per cent).

If participation in non-formal education by the population aged 25 to 64 years is looked at by employment status, no essential differences can be seen between the employed (2.0 per cent) and the unemployed (2.6 per cent). The lowest figure, which is difficult to record statistically because of the small number of cases, would appear to be for participation by the non-working population (under 1 per cent).²²

²¹ NSI: Lifelong Learning, 2003, pp. 19, 20 and 33.

²² According to the conventional criteria, those in employment and the unemployed form the working population. The non-working population is made up of those not seeking work and not available for work, e.g. children, older people and the sick.

5.4 Working Age Population and Informal Learning

According to the usual definition, informal or “self-directed learning” means acquisition of new knowledge and skills that is initiated and organized by the learner. Self-directed learning takes place without a teacher and outside the formal education system, and is not based on non-formal education and training provision. It employs all possible methods, such as reading of books, journals or instructions, use of the internet for educational purposes, use of teaching programmes on radio and television, visiting a library, and so on. Accordingly, when the European and Bulgarian survey on Lifelong learning in 2003 was made, the questionnaire that was used for the interviews contained the following question: “During the last 12 months did you use any of the following methods for self-learning (outside the regular education and organized courses, seminars, etc.) with the purpose to improve your skills? Reading of any printed materials like professional books, textbooks, magazines, handbooks, etc. (yes / no)? Making use of information from the internet with purpose to improve your skills (yes / no)? Purposeful watching of educational TV programs; making use of audio or videotapes, CD-ROMs with educational purpose (yes / no)?” However, the respondents were not asked *the extent* to which they had made use of these.

Table 5.10

Percentage of population having participated in informal education during the last 12 months prior to the survey (2003) ²³					
Age	EU25	Denmark	Switzerland	Bulgaria	Romania
25-34	37.6	65.8	51.3	19.9	12.0
35-44	34.4	68.8	52.2	18.7	9.2
45-54	31.4	66.5	51.5	15.7	8.0
55-64	24.6	60.5	42.9	6.4	5.6
Total	32.5	65.6	49.9	15.4	9.1

²³ Eurostat data base table trng_inf1, accessed on 20 April 2007.

Compared with other Europeans, Bulgarians are rather passive concerning informal (or self-directed) learning. In the 2003 Lifelong learning study, one of three “average Europeans” (of the EU25) throughout most age groups said, that he or she had been using informal education during the last 12 months, but only one of six Bulgarians did so (see Table 5.10). For comparison we add again data for Switzerland and Denmark, as “model countries” concerning education. The lowest figures are from Romania.

According to the Statistics Office, 16.4 per cent of Bulgarians aged 15 years and over undertook some form of self-directed learning in the twelve months preceding the study. The figure for the age group 25-64 years is similar, 15.4 per cent. See Table 5.11.

Table 5.11

Self-directed learning by gender, age and place of residence (2003), percentages ²⁴						
	Total population from 15 years of age			Age group 25-64 years		
	Overall	Men	Women	Overall	Men	Women
Urban	21.1	20.7	21.6	19.4	18.2	20.4
Rural	5.6	5.7	5.6	5.3	4.9	5.7
Overall	16.4	16.0	16.8	15.4	14.4	16.4

Gender. As is apparent, there is no essential difference between men and women in relation to their readiness to use self-directed learning (16.4 per cent and 16.8 per cent respectively). As age increases, this enthusiasm declines among both men and women (Table 5.12).

Urban / rural. The proportion of self-directed learners is (according to the survey) four times as high among those living in urban areas as among those in rural areas. This reflects both low interest in education among people in rural areas and fewer opportunities. In theory, access to education in rural areas has constantly improved with the development of modern communications technology.

²⁴ NSI: Labour Force Survey.

But the financial factor should not be overlooked. The age of the Bulgarian rural population is above average while their incomes are below average, and they often survive by some form of subsistence economy such as gardening and micro scale agriculture. However, a minimum level of technical equipment is required for access to education via the modern media. In simple terms, the typical inhabitants of a Bulgarian village could not afford a computer and Internet access charges even if they wanted to and such services were offered in that place.

Table 5.12

Self-directed learning between the ages of 15 and 64 years by gender and age (2003) ²⁵						
Age	Number in 1000s			Percentage		
	Overall	Men	Women	Overall	Men	Women
15-24	422.3	201.6	220.7	39.7	37.7	41.6
25-34	215.4	105.5	109.8	19.9	19.0	21.0
35-44	199.3	87.8	111.5	18.7	16.5	20.8
45-54	180.9	77.2	103.7	15.7	13.8	17.3
55-64	60.2	30.1	30.0	6.4	6.8	6.0
Overall	1078.0	502.2	575.8	16.4	16.0	16.8

Table 5.13

Self-directed learning between the ages of 25 and 64 years by gender and level of education (2003) ²⁶						
Level of education	Number in 1000s			Percentage		
	Overall	Men	Women	Overall	Men	Women
Tertiary (ISCED 5 and 6)	395.8	159.0	236.9	44.1	45.3	43.4
Secondary (ISCED 3 and 4)	239.7	129.3	110.4	11.3	11.6	11.0
Lower Secondary (ISCED 2) or below	20.3	12.4	7.9	1.6	2.0	1.3
Overall	655.7	300.6	355.1	15.4	14.4	16.4

²⁵ Idem

²⁶ Idem

Previous education. Interest in self-directed learning varies widely between people with different levels of education (Table 5.13). People with high levels of education have a strong tendency to pursue such learning. Over 44 per cent of those who had completed higher education stated that they had used methods of self-directed learning. Among those who had completed upper secondary education, this proportion was 11.3 per cent, and among those with basic schooling or less, only 1.6 per cent. It is obvious that a higher level of education increases readiness to pursue self-directed learning.

Methods employed. As regards methods of self-directed learning, the 2003 Lifelong learning study showed that people aged 15 years and over most frequently use specialist literature (books, journals and instructions) as a means of self-learning. This method was used by 913 600 people, or 13.7 per cent of the population of that age group. The Internet was used as a source of information for self-directed learning by 562 300 people, or 8.4 per cent of the population of that age group.

Employment status. There is a clear difference in readiness to make use of self-directed learning between those in employment and the unemployed. According to the study, those in employment learn by themselves more often (21 per cent) than the unemployed (9.6 per cent).

Conclusion. Compared with other Europeans, Bulgarians are very little engaged in self-directed learning. Those doing so tend to be people who have completed higher or upper secondary education, above all the younger generation. The low involvement in self-directed learning among the unemployed and those with low levels of education demonstrates both that they are lesser motivated, and that they lack of practice and familiarity with self-directed learning. In some cases, such as among the rural population, limited material resources are a reason, too.

5.5 Outcomes of the 2005 Study on Lifelong Learning in Europe

Using a different methodology, the European Commission, in a 2006 report on progress towards the objectives of the Lisbon Strategy,²⁷ found that an European average of participation in “Lifelong learning” was 10.8 per cent in 2005. This Lifelong learning indicator refers to persons aged 25 to 64 who answered (in the Labour Force Survey 2005) that they had received education or training in the four weeks preceding the survey.²⁸ “Education and training” was to mean either “in regular education” or “in other taught activities”. However, self learning was not longer covered.

In its Lisbon Strategy, the EU has defined as an objective to reach 12.5 per cent by 2010. This is one of the five benchmarks of the Lisbon Strategy. Most remarkable are the differences between the member states. The report listed as best performers Sweden (32.1 per cent), the UK (27.5 per cent) and Denmark (27.4 per cent), followed by Finland, the Netherlands, Slovenia, Austria and Spain. All other EU countries were below the average performance level of 10.2 per cent. The lowest participation rates have Romania with 1.6 per cent and Bulgaria with 1.3 per cent (both countries were in that time yet candidates to EU accession but were covered by the study anyway).

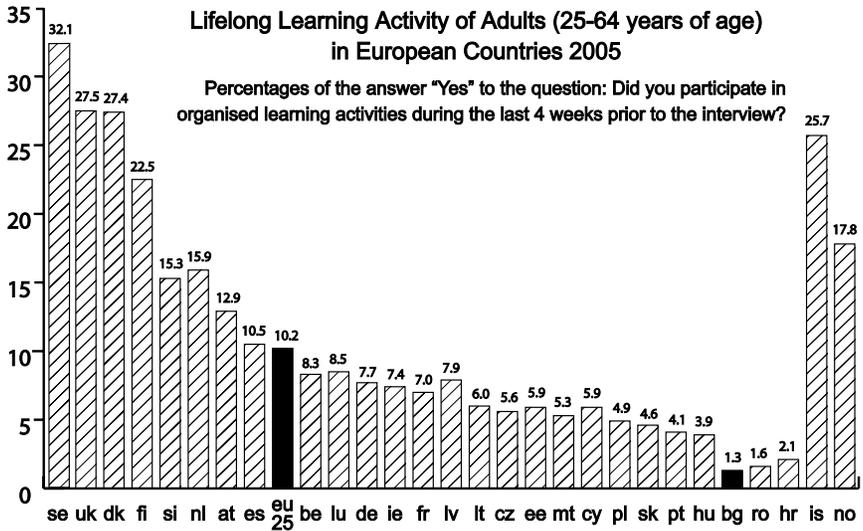
In order to assess the Bulgarian position in the context of Lifelong learning in Europe, see Figure 5.1. Bulgaria (bg) and the EU25 average (EU25) are marked with black columns.²⁹

²⁷ Commission of the European Communities: Progress towards the Lisbon objectives in education and training. Report based on indicators and benchmarks. Report 2006, p. 35-40, and its Annex “Detailed analysis of progress”, chapter 6.2.

²⁸ The denominator consists of the total population of the same age group, excluding no answers to the question ‘participation to education and training’. Both the numerators and the denominators come from the European Union Labour Force Survey (EU LFS).

²⁹ Other countries listed are: Sweden (se), United Kingdom (uk), Denmark (dk), Finland (fi), Slovenia (si), Netherlands (nl), Austria (at), Spain (es), Belgium (be), Luxemburg (lu), Germany (de), Ireland (ie), France (fr), Latvia (lv), Lithuania (lt), Czechia (cz), Estonia (ee), Malta (mt), Cyprus (cy), Poland (pl), Slovakia (sk), Hungary (hu), Romania (ro), and for comparison Island (is) and Norway (no),

Figure 5.1



Source: Eurostat database table lfsi_edu_a (from Labour Force Survey), accessed on 20 April 2007.

6 Economy, Population and Education

This chapter looks at the most significant economic and demographic data that need to be taken into account when discussing the Bulgarian education system. Particular attention will be given to the level of education of the population as a whole, and of individual groups such as Turks and the Roma. It will come apparent, how the level of education is connected to employment opportunities. The chapter concludes with suggestions as to what needs to be done by means of education, and more particularly adult education, to provide a sustainable basis for economic and social progress in Bulgarian society. Significant conclusions will also be drawn about those who have “given up hope”, to whom adult education should pay especial attention.

6.1 Population

The population of Bulgaria has declined steadily over the last 17 years. According to the census of 1 March 2001, Bulgaria then had a population of about 7.9 million. The most recent data suggest that this figure fell over the next five years to about 7.7 million (2005).¹ Population decline is a phenomenon that has persisted since the change of political regime. Between 1989 and 2005, the number of Bulgarians fell by just over 1.2 million. A main reason is emigration, initially for political and subsequently largely for economic reasons. Net emigration was about 680 000 people from 1989 to 2006.² Other important factors for population decline are the low birth rate (8.6 births per 1000 inhabitants in 2003, since then however rising to 9.2 in 2005³) and the high mortality rate of 14.6 deaths per 1000 inhabitants (in 2005), which corresponds, of course, with the high share of elderly.

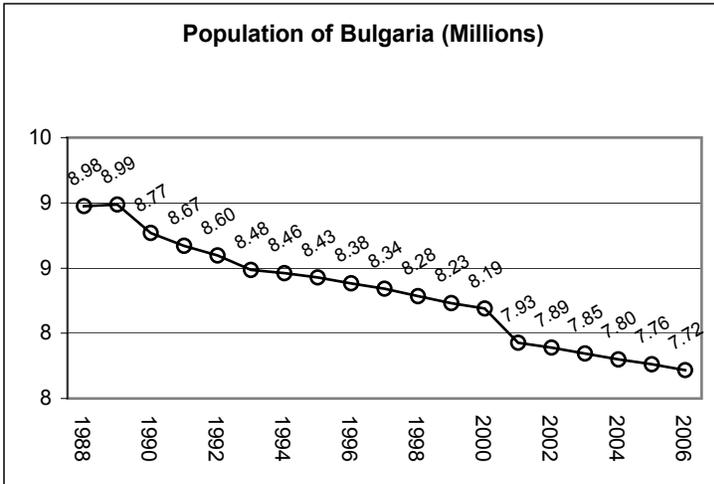
By way of comparison, while the birth rate has also been falling in the United Kingdom as well (from 14.4 in 1990 to 12.0 in 2005), the mortality rate in the United Kingdom has ever been appreciably below that in Bulgaria: from 11.2 in

¹ Eurostat data says 7,74 million for 2005 (year average). CIAWFB in early 2007 gave an estimate of 7,38 for mid 2006.

² Net emigration means here the number of emigrants minus number of immigrants. Data are from Eurostat, early 2007.

³ Eurostat data. CIA WFB estimates 9.65 for 2006.

1990 decreasing to 9.7 in 2005). The EU25 average mortality rate in 2005 is 9.6, EU25 average birth rate is 10,5.



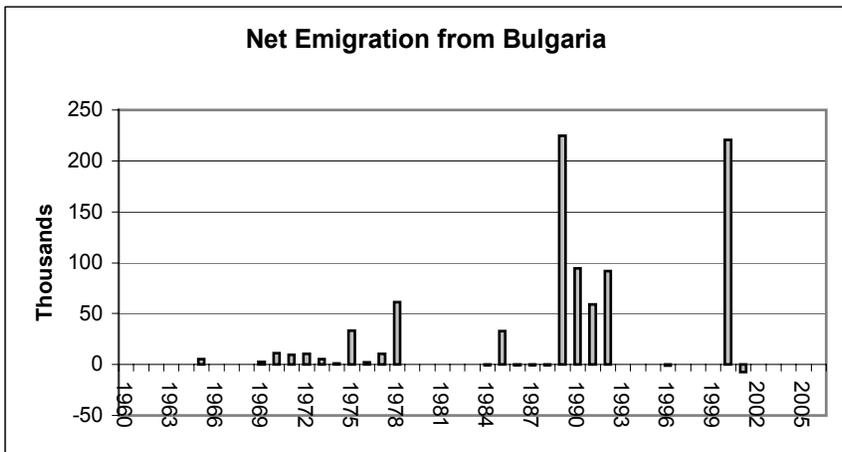
Gender relationship: The number of women in Bulgaria exceeds that of men by almost 230 000. In 2005 there were 1060 women to every 1000 men.

Urban / rural: 70 per cent of the population live in towns and cities, and 30 per cent in rural areas. (Until World War II about 80 per cent of the population was living in rural areas. The shift of urban population is basically a results of socialist urbanisation and industrialisation politics in the 1950ies and 1960ies.)

Ethnic self-assessment: According to the census in 2001, around 84 per cent of the population define themselves as Bulgarian (6.7 million). They are followed by Turks (747 000 or 9.4 per cent) and Roma (gypsies, or, as they often continue to call themselves, *cigani*, counting 371 000 or 4.7 per cent⁴). The remaining ethnic communities account statistically for only just over 1 per cent (69 000 persons).

⁴ The Roma share in Bulgarian population is subject to continuing discussions, and other estimates claim the number to be up to 500 000. See as well p. 15.

Age structure and life expectancy: Population has been becoming older in average for 50 years now. For example, the proportion of children under 15 years of age fell from 20 per cent in 1990 to 14 per cent in 2005. At the same time, the proportion of senior citizens aged 65 years and over rose from 13 to about 20 per cent (in 2005). Average life expectancy is rising, if only slowly. Life expectancy of women is 76 years, and that of men is 69 years.⁵ Comparative figures for Germany are 75,7 years for men, and 81,4 for women, and for the UK 76,2 years for men and 80,7 for women.⁶



Emigration: A significant factor in demographic change in Bulgaria during the last 20 years has been emigration. This started after the Živkov regime had adopted a policy of opposing the Turkish minority in the mid 1980s and thus provoked a wave of emigration in 1989/1990. Within a few months, several hundred thousand ethnic Turks left the country, heading for Turkey. However, a considerable number of them came back subsequently, resulting in a net emigration of about 220 000 in 1989, and between sixty to ninety thousand in each of the following three years. This steady flow stopped in 1993.⁷ Another peak of emigration

⁵ Most recent data is from 2004, but there was nearly no change during the last decade. Data from 1999 shows 68.3 years for men and 75.1 years for women.

⁶ UK data referring to 2003.

⁷ Eurostat data.

was in 2000 when again about 200 000 persons left the country. Since then, net emigration has considerably decreased. However, public opinion is that Bulgaria suffers from a heavy brain drain of the young and the well educated. In fact a lot of people go to European countries or the US either for education or for work, but as the statistical figures show, this does not cause a constant stream of emigration and population loss.⁸

6.2 Educational Attainment

Throughout the modern history of the country, Bulgarians have generally placed great value on educating their children. The expansion of school education without state support in the second half of the 19th century (see Section 1, from p. 27) was a particular cause for later national pride. According to a number of usual statistical indicators, the educational attainment in Bulgaria is today more or less at EU level, and in some respects it is even higher. On the other hand, problems since the change of political regime in 1989 have led to a considerable decline in quality in some areas as vocational education where, for example, a lack of modern equipment and reasonable salaries hampers adequate teaching and learning.

Advance in education. As shown in Chapter 1, the modern Bulgarian school system has its most important roots in a movement in the 19th century. These schools were set up and run without direct help by the Sublime Porte (albeit not without its agreement). This genuine Bulgarian “civil society type” education system helped increase Bulgarian literacy in the 19th century. After a more or less independent Bulgarian state had been established in 1879, education increasingly passed into the hands of the new government. Even then, the main task in the field of education was to enable the population to learn to read and write. The proportion of illiterates, which stood at 70 per cent in 1900, fell rapidly. In 1920 it was still 42 per cent, but by 1946 it had declined to 23 per cent, and by 1975 to 5 per cent. (See Figure 6.1 and Table 6.1).

After the Second World War , a considerable improvement in the education level of the population of working age was achieved. The proportion of people completing higher education rose from 1.6 per cent in 1946 to just over 21 per cent in

⁸ See also: August Gachter (2002): *The Ambiguities of Emigration: Bulgaria since 1988.* (International Migration Papers, 39).

2001. It should be noted, however, that Bulgaria already had a level of higher education in the early decades of the 20th century which was considerably above that in neighbouring countries and in some respects, such as the proportion of women among higher education students, above that in the major European countries.

Table 6.1

Proportion of literate persons in population over 7 years of age by gender and place of residence (percentages) ⁹							
	Years						
	1900	1910	1920	1946	1975	1992	2001
Overall	29.8	42.0	57.7	77.0	94.8	98.0	98.2
Men	45.0	57.8	66.4	85.5	97.2	98.8	98.7
Women	14.0	25.6	39.2	68.6	92.4	97.3	97.8
Urban	54.0	64.3	71.3	88.3	93.4	98.9	98.8
Men	67.3	75.3	80.1	91.6	98.6	99.3	99.1
Women	39.7	52.4	61.9	81.7	96.0	98.6	98.6
Rural	23.4	36.3	47.8	73.7	91.3	96.2	96.9
Men	38.9	53.2	62.7	83.4	95.3	97.6	97.8
Women	7.4	18.9	33.4	64.3	87.4	94.8	95.9

The era of Communist Party rule after the end of the Second World War brought further advances in education. The proportion of people completing upper secondary “middle” education rose from 5 to 48 per cent. At the same time, the number achieving no more than basic education fell, from 93 to 31 per cent.

Currently, three quarters of the working population aged 25-64 years have completed upper secondary “middle” (*srédno obrazovánie*) or higher education (see Appendix Tables 2, 3 and 4). This is more than the average of the EU15 countries

⁹ Unpublished figures from the Bulgarian National Statistics Institute..

(62 per cent)¹⁰, although lower than in Germany (83 per cent). The illiteracy rate is now 1.9 per cent (2001), according to official data.

According to current indicators, the level of education of the working population between 25 and 64 years of age in Bulgaria is higher than that of the average of the EU countries (2002) in some areas. For example, the proportion of adults of working age (25-64 years) who have completed at most primary education is 29 per cent (in 2002) in Bulgaria, appreciably lower than in the then in the EU15 states (38 per cent, mainly because of very poor figures of Portugal, Spain and Italy). Germany has only 17 per cent of such low educated, but Czechia, Slovakia, Estonia and Lithuania with 12 to 15 per cent are even better (see Appendix Table 1). – Completed secondary education have 50 per cent of Bulgarians of working age (15-64 years). Again, this is better than EU15 average (in 2002) with 41 per cent. Of the EU15, only Germany, Austria, Denmark and Sweden have higher figures. However, most of the new member states of 2004 do as well.

Educational Attainment and Ethnic Allegiance

Comparison between ethnic groups. Of the three main ethnic groups (Bulgarians, Turks and Roma), the Bulgarians were the best educated in 1946, immediately after the Second World War: 45 per cent of ethnic Bulgarians of working age had then completed four-year primary education, 16 per cent had completed eight-year basic education (*osnóvno obrazovanie*), 5 per cent middle education (*srédno obrazovanie*), and 1.8 per cent higher education; 17 per cent of ethnic Bulgarians were illiterate (see Appendix Table 4).

In broad terms, the ethnic Bulgarians still enjoy their educational advantage. In 2001, their average level of education was higher than that of the Turks and the Roma: 24 per cent of ethnic Bulgarians had completed higher education, 53 per cent had completed middle education, and 21 per cent eight-year basic education. Only 0.4 per cent were illiterate (Appendix Table 3). The Turkish minority has rapidly caught up, however, as will be seen below.

¹⁰ „EU15“, meaning EU member states until 2004, in contrast to EU25, meaning EU member states 2004 to 2997 when Bulgaria and Romania joint the Union.

Improvement in the level of education of the Turkish minority. In the period 1946-2001, the level of education among the Turkish population group changed markedly. While practically no Turks had completed higher education in 1946, and only 0.3 per cent had completed middle education, the proportion of Turks who had completed higher education in 2001 was 2.7 per cent, and those who had completed middle education (*srédno obrazovanie*, upper secondary) was 23.7 per cent. The sharpest rise, however, was seen in the number completing eight-year basic education: from 2.4 per cent in 1946 to 53 per cent in 2001. At the same time the proportion of illiterates fell dramatically, from 77 per cent to 3.5 per cent.

Continuing low educational attainment among the Roma. The level of education continues to be lowest among the Roma. In 1946 no Roma had completed higher or middle education. Only 0.8 per cent had completed eight-year basic education, and the proportion of illiterates was 85 per cent. Even today (2001 figures), the Roma completing higher or middle education are in a minority (7.2 per cent), while 45 per cent have completed eight-year basic education, and 27 per cent primary education, while 7.8 per cent of Roma have completed no stage of education (which does not necessarily mean that they never attended school – many Roma children go to school for a year or two but do not complete primary education). 13 per cent of Roma are counted as illiterate.

Tasks for the future. The above figures show that one of the greatest tasks for the country's education and social policy is to promote educational enrolment among the Roma. Low levels of education and vocational skills restrict the labour market opportunities of this population group and are often a cause of poverty. Around 48 000 illiterates are in need of education and vocational training in Bulgaria, of whom 14 400 are ethnic Bulgarians, 13 500 are ethnic Turks, and 20 300 are Roma.¹¹ One major problem is the 31 000 or so people who have not completed primary education, since many of them cannot survive in the labour market because they lack knowledge and skills.

The high level of illiteracy among the ethnic minorities is evidence either of gaps in educational legislation, or of failure to implement it. Although education is compulsory, the state allows children not to go to school, or to drop out early. How-

¹¹ All ethnic figures are based on people's own definition of their ethnicity. Those stating that they were Roma, Turkish or Bulgarian in the survey are regarded as such.

ever, this cannot be laid at the door of the authorities alone, since regular school attendance depends in large measure on awareness by the parents that education is more important for children than starting to bring in money at an early age. This in turn assumes that there is a caring parental home, which is not in fact the case for many, especially Roma, children. Education problems of ethnic minorities are complex and will need a lot of times to get solved.

6.3 Economic Development

Since the major economic downturn in 1996/1997 that led to the fall of the then socialist government under Žan Videnov, Bulgaria has experienced macroeconomic stability and strong growth. After the catastrophic winter 1996/1997, subsequent governments became committed to economic reform and responsible fiscal planning. In 1997, macroeconomic stability was reinforced by the imposition of a fixed exchange rate of the Lev against the German D-mark (now Euro) and the negotiation of an IMF standby agreement. Low inflation and steady progress on structural reforms improved the business environment. Bulgaria has begun to attract significant amounts of foreign direct investment. However, corruption in the public administration, a weak judiciary, and the influence of organized crime remain large challenges for Bulgaria.

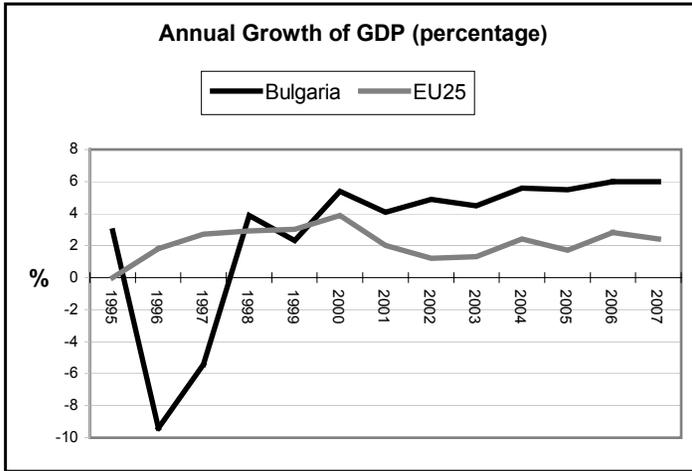
6.3.1 Economic Growth

Despite the positive development since 1998, Bulgaria in economic terms remains well behind other EU countries, including the states which joined the EU in May 2004. It is one of the poorest countries in Europe, comparable with Romania and Turkey. Generally, economic indicators are worse only in the states of the Western Balkan such as Albania, Serbia, Bosnia and Macedonia. However, the Bulgarian economy has grown considerably in recent years, and Bulgaria has been coming closer to EU average indicators since 1998.

After the severe economic crisis of 1996-1997 an upturn was brought about by strict financial discipline, privatisation and structural reform. In 1996, economic

growth was still negative (minus 9.4 per cent), but in subsequent years growth in Gross Domestic Product (GDP) was substantial¹², as can be seen in Figure 6.1.

Figure 6.1



GDP per head of population is rising: in 2003 it stood at 2249 euros and has risen since then to 2500 euros in 2004 and nearly 2800 euros in 2005. This is definitely a positive development in comparison with the very low level of 1996/1997 when it was at 1250 USD. However, people's purchasing power is yet far below that in the other EU countries: if average purchasing power in the formerly 25 EU Member States¹³ is given an index of 100, Bulgaria only reached 33 in 2005; in other words, only a third of EU25 average. Thus Bulgaria is - in terms of purchasing power per head of population - well behind the weakest of the older EU Member States, Latvia, which has an purchasing power index (per head of population) of 48 in 2005. Bulgarian situation is similar to Romania (34 in 2005), and somewhat better than Turkey (with 27.6 in 2005).¹⁴

Sectors: GDP in Bulgaria consists of 9.3 per cent contribution by agriculture, 30.4 percent by industry and 60.3 per cent by services (in 2005).

¹² Eurostat data, January 2007.

¹³ The 25 member states until January 2007, when Bulgaria and Romania joined the EU.

¹⁴ Eurostat: Statistics in focus, Economy and Finance.

Average monthly income per person in Bulgaria was 218 Leva (about 110 Euro) in 2006, or per household 540 Leva (about 280 Euro).¹⁵ Government plans for 2007 were to rise the minimal wage to 80 Euro a month.¹⁶

6.3.2 Productivity of Labour

The productivity of labour in Bulgaria has risen consistently in recent years. This is one of the key factors in economic growth. In terms of a EU25 comparison: Labour productivity in Bulgaria was 28 per cent of the EU25 average in 1997, and has ever been growing since, to 34 per cent in 2005. Expectations are that in 2008 labour productivity will be at 38 per cent of the EU25 figures.¹⁷ For further comparison: German labour productivity traditionally is some points over the EU25 average, however in the recent ten years it has been constantly falling: from 108 index points (in 1995) to 103 (in 2005). Labour productivity in the UK, as another example, has been constantly raising from about 100 (in 1995) to 108 (in 2005). – Labour force in Bulgaria is estimated to comprise about 3.34 million people in 2005.

6.3.3 Investment

Investment has grown continuously since 1998, as a result of the structural changes in the economy. In 2003, the private sector of economy contributed already 73 per cent of total economic value creation. The national infrastructure, particularly the energy supply, is being expanded to meet EU norms. This complements investment by Bulgarian and foreign enterprises. Financial institutions have now achieved greater stability. Loans are easier to obtain, and more importantly, rates of loan interest have gone down. In 2003, assets worth over 7 billion leva were invested. This was 5 per cent more than in 2002, and 30 percent more than in 2000 (after allowing for inflation). Bulgarian National Bank statistics read that in 2005 some 2882 million dollars of investments have entered Bulgaria.

¹⁵ NSI, January 2007.

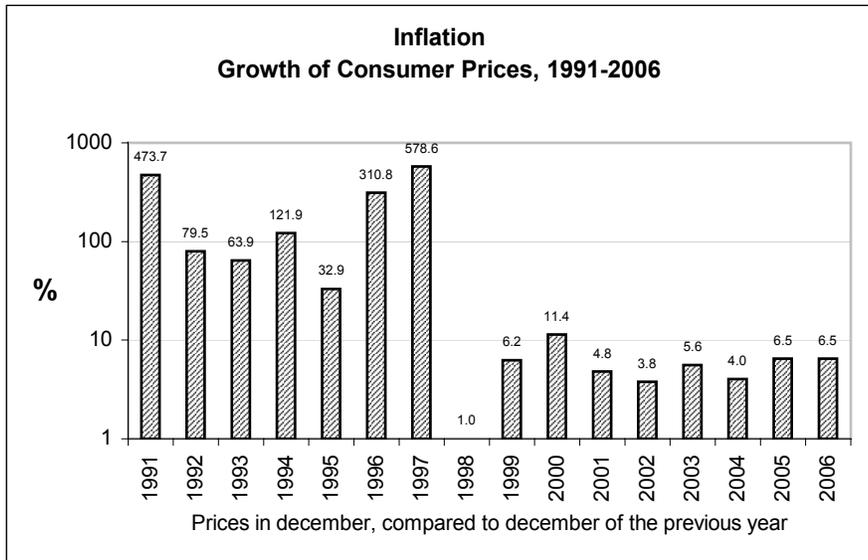
¹⁶ Radio Bulgaria, 11. Jan. 2007.

¹⁷ Labour productivity is measured as GDP in PPS per person employed, relative to EU25 (EU25 = 100)

Foreign investments are expected to go as high as EUR 4000 million by end 2006.

6.3.4 Inflation

After the fall of the communist regime in 1989/1990 prices rose considerably, due to liberalisation of prices. In the early 1990ies, inflation rates of 30 to 120 per cent were usual, and a currency erosion led to a hyper inflation in 1996/1997 with inflation rates of up to 300 and 600 per cent two years running. With the introduction of the currency exchange rate in 1997 tying the Lev to the DM, the previous galloping inflation was brought under control. In the period 1998-2005, the year-on-year inflation rate (December of the year in question compared with December of the previous year) was between 1.0 and 11.4 per cent. Inflation rates in recent years were around 5-6 per cent. (See Figure 6.2). In the draft state budget for 2007 (in late 2006) government took into account an estimated 4.4 per cent inflation.¹⁸



¹⁸ Radio Bulgaria, 15 November 2006.

¹⁹ NSI: *Bălgarija 2003, Socialnoto i ikonomičeskoto razvítie*. Sofia 2004. p. 181.

6.3.5 EU membership since 2007

After the recession of 1996-97, the national economy has gradually stabilized. This is seen particularly in high economic growth and increases in labour productivity and investment. In January 2007, Bulgaria joined the EU, together with Romania, despite serious concerns about the administrative performance, liability of its judiciary, high black market share and problems with corruption and organized crime. Economically, Bulgaria lags far behind the other EU member states, even Romania. This is to a great deal due to the heavy setback of 1996/1997 and can be seen from GDP per head of population and purchasing power. Along with Romania and Turkey, Bulgaria is still one of the poorest countries in Europe, but the positive development of recent years anyway gives hope that Bulgaria will catch up with the other EU countries. EU accession presents tremendous opportunities for Bulgaria. The harmonization of Bulgarian legislation and practices with EU standards brings wide-ranging benefits to the economy, as does the improved access to EU markets. Bulgaria also stands to benefit from substantial project financing from the EU. These projects can add greatly to Bulgaria's productive capacity, but only if they are planned carefully and managed properly, which will require a significant improvement in administrative capacity. Financial flows from the EU and revenue losses associated with accession will also complicate fiscal policy because they will add to demand pressures, and thus require offsetting savings to maintain a restrictive budget stance.²⁰

6.4 Labour Market

With more and more foreign companies seeking to enter Bulgarian markets, the demand of skilled labour has risen considerably in recent years. On the other hand, there is still by far more supply of low or inadequately skilled labour force.²¹

²⁰ Statement of IMF in May 2006.

²¹ We use the terms "economically active", "working population" and "labour force" as kind of synonyms. All three go back to the same question: how many people, or what proportion of the population (of working age), are available to the national economy? Both those in employment (including employers, self-employed and unpaid family workers) and the unemployed (i.e. those seeking work or willing to work [but excluding those definitely not seeking work, such as children, the elderly and the sick]) therefore make up the working population (i.e. the economically active population, i.e. the labour force).

A remark on the reliability of employment data: In the section below we will present some labour market data, in order to investigate the situation in more detail. However, employment statistics should be treated with scepticism. Hidden unemployment is certainly higher than the official rate. Another factor which sheds doubt on the unemployment figures, is the widespread informal (black, grey or shady) economy. Recent reports on informal economy state that this market accounts for about 30 per cent of the country's economy and that 23 per cent of those employed are engaged with black economy.²² As a witness of everyday life in Bulgaria one could say that it is more usual than unusual for Bulgarian companies to pay, say, wages of 500 or 600 Leva a month, but to declare 180, thus saving taxes and social security contributions. The trade unions' report provided another explication as well: According to this report, companies feel forced to use "unofficial employment" in order to get rid of impediments imposed by bureaucracy and corruption of the state authorities. Thus, two factors make official statistics uncertain: On the one hand, there are probably *more* de facto unemployed than officially registered. On the other hand, de-facto-unemployment is reduced by a considerable amount of people who are officially registered as unemployed, but work in black or grey economy sectors.

6.4.1 Average wages

Accordingly to data of the National Statistics Institute,²³ the average annual wage in Bulgaria in 2006 was 4 255 Leva (2 176 Euro), or about 180 Euro a month. However, as said above, one should bear in mind that these data are based on employment and service contracts, thus rendering the "official" side of things. Widespread "unofficial" payment in the private sector, can, as a matter of logic, not be covered by such data.

In the public-financed sector, the official average annual wage was 5 265 leva (2 692 euros), and in the private sector –officially– 3 804 leva (1944 euros). Wages were, as usual, highest in the financial intermediation sector, where they

²² Republika Bălgarija, Ikonomičeski i socialen sävet: *Stanovište na ikonomičeskija i socialen sävet po neformalnata ikonomika i merki za ograničavaneto j.* [Statement of the economic and social council on the informal economy and means to reduce it]. Sofia 2006. (Available as pdf at: www.esc.bg) This report summarizes other reports of the World Bank, etc.

²³ As reported by BTA, February 20th, 2007.

averaged 9 951 leva (5088 euros) annually, followed by electricity, gas and water supply (at 7 537 leva, 3 854 euros), mining and quarrying (7 256 leva, 3 710 euros), and public administration and compulsory social insurance (6 400 leva, 3 272 euros). The lowest value, 2 757 leva (1 410 euros), is reported in the hotel and restaurant business.

A total of 2.2 million people were working under such contracts in 2006, including 673 364 in the public-financed sector and 1 534 369 in the private sector.

The largest number of wage earners, 611 468, were employed in the processing industry, and the smallest, 27 810, in the extracting industry.

6.4.2 Available Labour

According to the data of the Bulgarian National Statistics Institute, the number of people in the labour force in Bulgaria fell from 3.5 million in 1998 to 3.3 million in 2005. This fall was greatest in the period 1998-2000. In 2006, the labour force was 3.415 million people.²⁴

The coefficient of economic activity (activity rate)²⁵ fell from 51 per cent in 1998 to 48.8 per cent in 2000, and then has been slightly rising again to 49.2 in 2005²⁶ and 51.3 in 2006.

Economic activity among men is appreciably higher than among women: for 2005, the figures are 55.4 per cent for men and 44.4 per cent for women²⁷, and 56.7 vs. 46.3 in 2006.

Urban / rural. A considerable difference is being observed between the economic activity of the urban and the rural population. The activity rate of urban population rose from 2003 to 2005 from 53.5 to 54.2 per cent (55.8 in 2006), whereas the activity rate of rural population remained by and far at the same level of 39.3 or 39.2 per cent respectively²⁸ (40.8 in 2006). An important reason for the differ-

²⁴ All data for 2006 cited in this section were published on NSI website, accessed in March 2007.

²⁵ Number in the labour force as a proportion of the population aged 15 years and over.

²⁶ NSI employment data 1/2006 table A-II-1.

²⁷ Idem.

²⁸ NSI employment data 1/2006, table A-II-1.

ence of rural and urban activity rates might be found in the traditional life pattern of Bulgarians: people often chose to return to the village of their (or their families) origin when they retire. First, families often have their own simple houses in the villages, and second, village life is much cheaper, and poor pensions motivate people to use their gardens for food supply.

Age structure of the labour force. Since society is ageing as a whole, the age structure of the labour force is also changing. There is an increase in the proportion of older people among the working population, both for women and for men. In the years 1998 to 2005, the proportion of people aged 55 years and over in the labour force rose from 7.3 to 12.2 per cent.²⁹

Table 6.2

Working population, employed and unemployed ³⁰ 1998-2005							
	Labour force (in 1000s)			Non Labour Force (in 1000s)	Activity rate (%)	Employment rate (%)	Unemployment rate (%)
	Total	Employed	Unemployed				
1998	3 532	3 035	498	3 392	51.0	43.8	14.1
1999	3 409	2 875	534	3 483	49.5	41.7	15.7
2000	3 361	2 795	567	3 529	48.8	40.6	16.9
2001	3 363	2 699	664	3 416	49.6	39.8	19.7
2002	3 332	2 740	592	3 408	49.4	40.6	17.8
2003	3 283	2 834	449	3 395	49.2	42.4	13.7
2004	3 322	2 922	400	3 362	49.7	43.7	12.0
2005	3 314	2 980	334	3 354	49.7	44.7	10.1

²⁹ NSI employment data 1/2006

³⁰ NSI: Employment and Unemployment. 1/2006. Sofia 2006. – The unemployed are counted in accordance with Eurostat criteria. These state that anyone aged between 15 and 74 years who is without work at the time of the report, would have been available within two weeks for employment or self-employment, and had been actively seeking work within the preceding four weeks, i.e., had taken steps to find a job or to begin a self-employed activity, is to be regarded as unemployed.

Labour force and educational attainment. Generally, the higher a person's education, the more probably he/she is part of the labour force. Bulgarian data are as follows: The highest proportion of labour force activity is found among people who have completed higher education (74 per cent in the second quarter of 2004, and 84.6 per cent in the first quarter of 2006). They are followed by people who have completed upper secondary middle education (*srédno obrazovánie*)³¹ (64 per cent in 2Q2004, and 71.6 in 1Q2006). An interesting fact is that those leaving Vocational *gimnázii* are considerably better integrated into the labour market (75 per cent in 2Q2004 and 75.8 per cent in 1Q2006) than those from general *gimnázii* (53 per cent in 2Q2004 and 62.5 per cent in 1Q2006). Even lesser likely to be permanent members of the labour force are people who have only completed eight-year basic education (26 per cent in 2Q2004 and 35.9 per cent in 1Q2006). Only 24.8 per cent of people with at best completed primary education (four years) are part of the labour force.³²

6.4.3 Employment

General trends. The rise in employment since 2002 is evidence of the upturn in the economy. The highest level of employment reached recently was in 1998, when the number in work was 3.035 million; this equated to an employment rate of 43.8 per cent. Employment then fell again, reaching a low of 39.8 per cent in 2001. Since 2002, it has been rising increasingly rapidly, and reached 44.7 per cent in 2005 (annual data; there are considerable variations in quarterly figures). The employment rate for women (40 per cent) is distinctly lower than that for men (49.7 per cent; both figures from 2005).³³

Age structure of the working population. General employment was 44.7 per cent in 2005. Most highly participating in the labour market were people in the age groups 25-34 years (69.4 per cent), 35-44 years (77.1 per cent) and 45-54 years (72.1 per cent). Employment of the age group 15-24, however, was at 21.6 per cent, and people of the age group 55-64 years were participating in the labour

³¹ i.e. ISCED 3, providing access to higher education, at least until the plans to introduce a special centralized examination called *matúra* for access to higher education after finishing secondary education.

³² NSI employment data 1/2006, table A-III-7.

³³ NSI employment data 1/2006, table A-II-1.

market with 34.7 per cent. Employment rates of all these groups were raising by about 3 to 5 percentage points during the last three years (2003-2005). However, the employment rate of those over 65 sank (from 3.6 per cent in 2003 to 2.5 per cent in 2005).³⁴

Educational attainment among those in employment. The level of education (expressed in formal education degrees) has decisive influence on labour market integration. Employment rates (i.e. share of those employed measured against the total group) are as follows:

Table 6.3

Employment rate by level of education		
	2003	1Q 2006 ³⁵
Higher education	67.9	69.1
Middle education (12 years)	55.7	58.4
Basic education (eight years)	22.0	21.2
Primary education or less	9.5	8.3

In higher education (overall employment rate 69.1), there is an important subdivision: Those with a Bachelor's or Master's degree or a Ph.D. are employed by 73.4 per cent, whereas holders of the rather specific Bulgarian „specialist“ degree³⁶ were employed by only 55.3 per cent. This is even less than people with mere completion of upper secondary (middle) education (*srédno obrazovanie*). (All figures for the 1st quarter of 2006)

Also in secondary education there are interesting internal differences: Secondary vocational education (*srédno profesionálno obrazovanie*) obviously leads to much better labour market integration than general secondary (*srédno óbštó obrazovanie*). The figures for the first quarter of 2006 show an employment rate of

³⁴ NSI employment data 1/2006, table A-II-3.

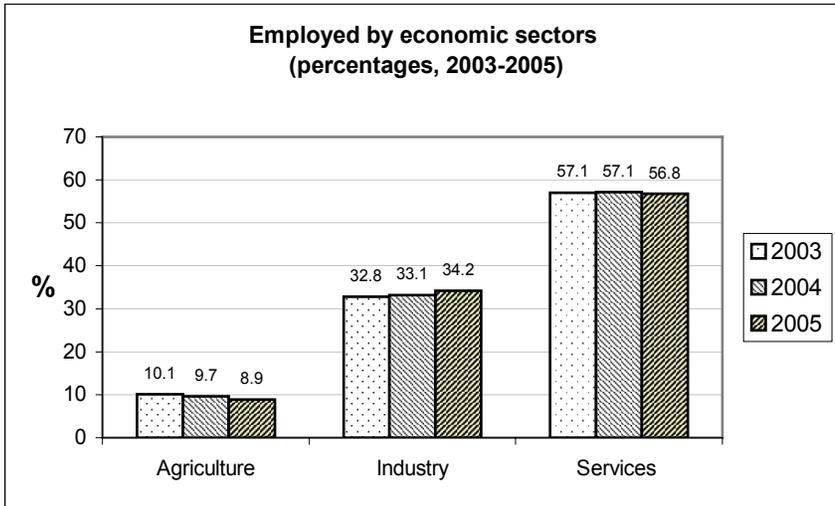
³⁵ NSI employment data 1/2006, table A-III-6, for those over 15 years of age.

³⁶ For an explanation of this specific traditional Bulgarian degree see pp. 75 and 91.

64.1 per cent for those having completed a secondary vocational school, but only 47.3 per cent for those with general secondary education.³⁷

As a general trend, since 1998 the proportion of people with higher levels of education among those in employment has been rising, while the proportion of those in employment with low levels of education has been falling. (Both trends by 4-5 percentage points for the period from 1998-2003.)

Figure 6.2



Employment in the private and public sectors. As a consequence of privatisation of the formerly completely state owned economy, employment in the private sector has risen appreciably since the 1990ies. In the first quarter of 2006, the number of those employed in the private sector reached 2.09 million, or 71.2 per cent of all those in employment. (In 2Q2004 it were 69 per cent.) Therefore, 28.2 per cent (847 000) of those employed were working in the public sector. This shows a steady reduction of public jobs: In 2Q2004 there were yet 917 000 employed in public jobs (this is 31 per cent of all those in employment).³⁸

³⁷ NSI employment data 1/2006 table A-III-5.

³⁸ NSI employment data 1/2006 table A-IV-8.

Table 6.4

Number of those employed by area of occupation (1 st quarter of 2006)		
Area of occupation ³⁹	Number	%
Manufacturing	730 700	24,9
Trade, repair of motor vehicles and personal and household goods	472 600	16,1
Transport, storage and communication	220 700	7,5
Education	217 400	7,4
Agriculture, hunting, forestry and fishing	204 500	7,0
Public administration; compulsory social security	204 400	7,0
Construction	199 800	6,8
Health and social work	164 100	5,6
Real estate, renting and business activities	143 700	4,9
Hotels and restaurants	137 100	4,7
Other services	121 300	4,1
Electricity, gas and water supply	55 800	1,9
Mining and quarrying	39 000	1,3
Financial intermediation	29 200	1,0
Total	2 940 300	100

Of the 2.09 million employed in the private sector the predominant group were employees (accounting for 1.72 million), followed by the self-employed (227 000 in 1Q2006 and thus less than in 2Q2004 when it were 293 000) and employers (112 500; whilst in 2Q2004 it were 113 000). About 32 800 are counted as unpaid family workers (whereas in 2Q2004 their number was given with 64 000).⁴⁰

³⁹ The categories used follow the international NACE standards (Nomenclature générale des activités économiques).

⁴⁰ NSI employment data 1/2006 table A-IV-2.

Employment by economic sector. According to the latest data, over half of those in employment work in the services sector (56 per cent of those in employment). Industry provides jobs for a third (33 per cent), and agriculture for a tenth (11 per cent).⁴¹ There was no major changes in these figures during recent years. See Table 6.4, with data from 1Q2006.

Temporary employment. Over the last years the number of those in temporary jobs has risen, and this trend is spreading throughout the labour market. In 2Q2004, 184 000 people, or 6 per cent of those in employment (employees) in temporary or seasonal jobs. In 1Q2006 their number was 124 000 or 4.8 per cent of overall employees. Part of this were employees in a probationary period, but a great share of temporary jobs were created by the intervention in the labour market of the Employment Agency to provide short-term programmes.⁴² The National Statistics Institute also has data showing 85 000 people working without a contract of employment. This is contrary to the employment laws, but there is often a wide gap in Bulgaria between what the law says and what actually happens in this sphere.

6.4.4 Unemployment

Rapid decline in unemployment since 2001. In the wake of privatisation and the restructuring of the economy, the unemployment rate rose sharply between 1998 and 2002. Major industrial enterprises collapsed as a consequence of the financial and economic crisis of 1996/1997, some became insolvent, and others had to reduce their output or services, causing a rise in unemployment. In 2001, the number of people unemployed reached 664 000, or 19.7 per cent of the working population (the labour force).

With the end of most privatisation and structural reform, and a more favourable political and economic environment, a turning point was reached in the labour market in 2002. Unemployment began to fall relatively fast. The main reasons for this are thought to be the general upturn in the economy, the improvement in the business climate, financial stability and the rise in domestic and foreign invest-

⁴¹ NSI employment data 1/2006 table A-II-5.

⁴² *Agéncija po zaetosttá*. Their local branches are known as “employment offices” (*bjuró po trudá*). - Data from NSI employment data 1/2006 table A-IV-10.

ment. The continuing integration of Bulgaria into the economic structures of Europe and the EU also had an impact. At the same time, the Government took measures actively to ease the labour market. As a result, the annual average unemployment rate for 2005 fell to 10.1 per cent which was the lowest figure since the economic crisis of 1996/1997. (For the third quarter of 2006 unemployment was registered with 8.8 per cent, but quarterly figures always differ from annual average.)

According to recent figures from the Statistics Office, there were 334 200 persons unemployed in 2005 (vs. 449 100 in 2003), 182500 of them men (246 100 in 2003) and 151600 of them women (203 000 in 2003). The unemployment rate for men is usually slightly higher (10.3 per cent in 2005) than for women (9.8 per cent 2005).

Table 6.5

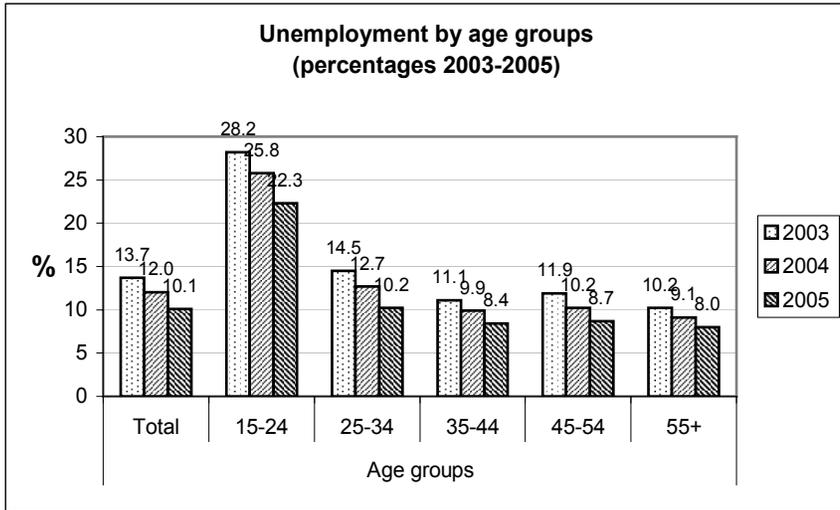
Unemployment rate by age groups (percentages) ⁴³							
	Overall	15-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65+
1998	14.1	32.2	15.4	10.8	10.6	9.7	6.1
1999	15.7	34.0	16.3	12.6	12.5	11.0	6.7
2000	16.9	35.3	17.3	13.8	14.0	13.3	5.6
2001	19.7	39.5	19.9	16.4	16.6	17.2	6.2
2002	17.8	36.5	18.6	14.7	14.7	14.8	5.1
2003	13.7	28.2	14.5	11.1	11.9	11.5	2.2
2004	12.0	25.8	12.7	9.9	10.2	9.1	
2005	10.1	22.3	10.2	8.4	8.7	8.0	

Unemployment and age: Unemployment is a problem especially of the young. As Figure 6.3 shows, other age groups have been relatively close to the overall unemployment rates of 13.7, 12.0 and 10.1 per cent in the years 2003, 2004 and

⁴³ NSI : Labour Force Survey

2005. However, those aged 15-24 are nearly twice as often registered unemployed than others.⁴⁴

Figure 6.3



Rural vs. urban unemployment: Unemployment in rural areas is higher than in the cities. This is not very surprising, since industrial and service development takes place mainly in cities, and villages have become to some extent kind of a twilight years zone for those retired, especially since agriculture does not provide the huge amounts of jobs as in socialist times. Here just the figures for the first quarter of 2006: Overall unemployment in Bulgaria was 9.8 per cent. Urban unemployment however was only 8.3 per cent, and rural unemployment 14.7 per cent.⁴⁵

Regional differences. For administrative purposes, Bulgaria is divided in some planning regions which embrace several of the 28 provinces (*óblasti*) each. Unemployment rates vary considerably in the different regions. In the first Quarter of 2006 overall unemployment was 9.7 per cent, but data from the planning regions were between 7.3 and 13.4 per cent. The lowest unemployment rate (7.3 per cent) was noted in the South-West, around Blagoevgrad, including borderlands to

⁴⁴ NSI employment data 1/2006 table A-II-6.

⁴⁵ NSI employment data 1/2006 table A-III-1-2.

Greece and Macedonia. Highest unemployment rate (13.7) was noted in the North-West Region around Vidin, bordering on a remote province of Serbia and, across the Danube, Romania. The differences are even more considerable on the administrative district (*óblasti*) level: Data for 2006 show a range of unemployment from 2.5 per cent in Sofia city to 21.0 per cent in the district of Tărgoviște (see the map on p. 278).

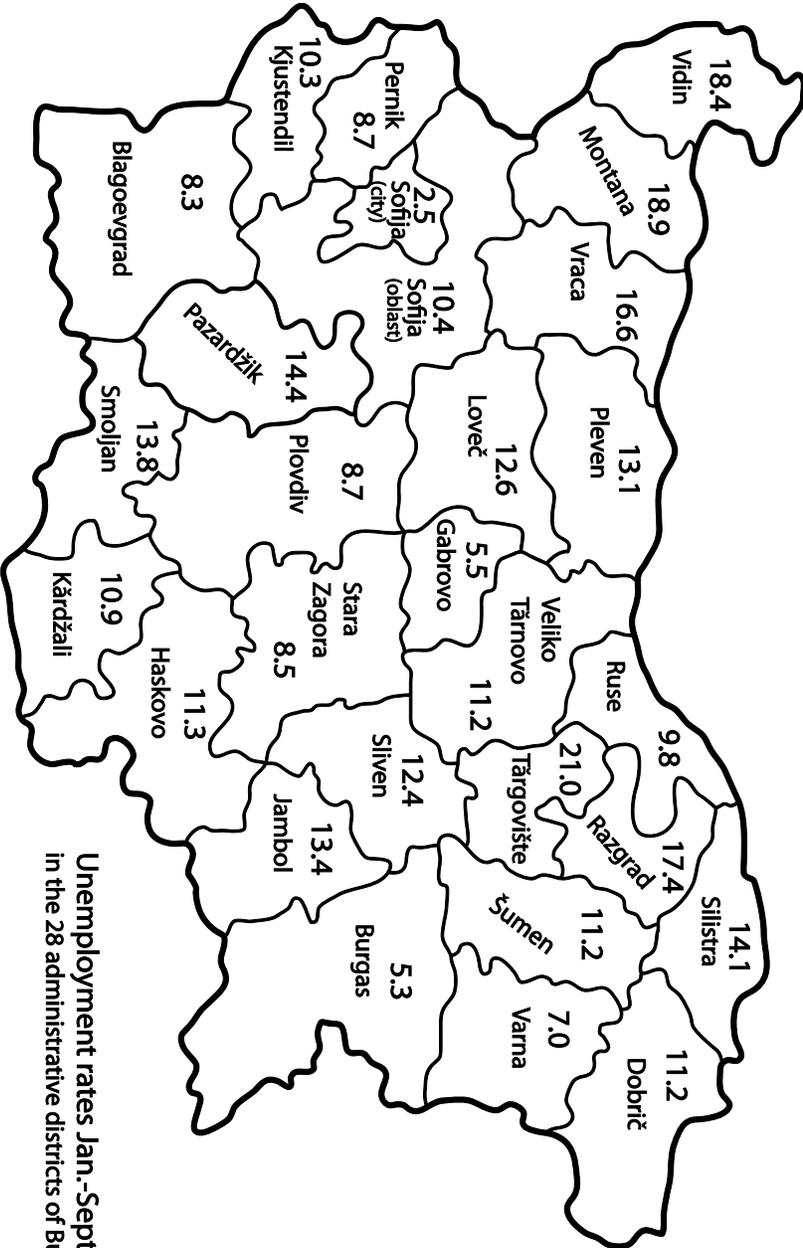
Unemployment and education. Unemployment depends considerably on the education attained. As Table 6.6 shows, when overall unemployment was at 10.1 per cent in 2005, only 4.1 per cent of people which had attained a higher education degree were unemployed, but 30.7 per cent of people with eight year basic education or less.

6.4.5 Main Labour Market Problems

Several problems can be identified in the labour market:

- **High unemployment among young people** despite the overall upward trend of employment: Unemployment among young people remains especially high: 32 per cent in 1998, 28 per cent in 2003 and 22.3 per cent in 2005 (see Table 6.5).
- **High unemployment among those with low levels of education.** One out of five of those with eight-year basic education and one out of three of those with at most primary education are unemployed (see Table 6.6).
- **Higher unemployment in rural areas** than in towns and cities: according to the latest figures (1Q2006), 14.7 per cent of the rural population are unemployed, as against 8.3 per cent of the urban population. This situation has become even more distinct during recent years, when employment rates in urban areas rose, but those in rural areas remained without much change.
- **High unemployment among the Roma.** According to the last census, (2001), only 41 000 of a total of 249 300 Roma⁴⁶ over 14 years of age were then in regulated employment, and 137 200 were unemployed. Hence over half of all Roma (aged 15 years and over) were without jobs. Roma thus accounted for a third of all the unemployed in the country.

⁴⁶ Ethnic identity as defined by survey respondents: as Rom counts who himself defines a Rom.



Unemployment rates Jan.-Sept. 2006
in the 28 administrative districts of Bulgaria

Table 6.6

Share of unemployed by educational levels, percentages, 1998-2005 ⁴⁷					
	Unem- ployed Overall	Highest educational level			
		Higher education	Middle education (twelve-year)	Basic education (eight-year)	Primary education (four-year) or less
1998	14.1 %	6.1 %	13.1 %	20.4 %	32.4 %
				-	
1999	15.7 %	5.8 %	14.6 %	24.7 %	36.7 %
				-	
2000	16.9 %	7.2 %	16.0 %	25.9 %	37.8 %
				27.7	
2001	19.7 %	8.9 %	19.2 %	30.9 %	47.6 %
				33.6	
2002	17.8 %	8.3 %	17.1 %	27.9 %	45.9 %
				30.7	
2003	13.7 %	6.8 %	12.6 %	22.9 %	33.5 %
				24.6	
2004	12.0	5.7	11.2	-	-
				21.9	
2005	10.1	4.3	9.3	-	-
				19.6	

⁴⁷ NSI Labour Force Survey, and Eurostat data from January 2007. Data for those with basic education or primary education are partly accumulated, since Eurostat does not provide separated data, and for 2004 and 2005 NSI data were not available when this book was finished.

- **High long-term unemployment.**⁴⁸ The long-term unemployed accounted for 57 per cent of those out of work in 1998, for 65.5 per cent in 2003 and for 59.7 per cent in 2005. There are little differences between men and women here. The number of those unemployed for three or more years sank from 2003 to 2005 from 38.2 to 34.0 per cent, but it is with 113 700 anyway very high.⁴⁹
- **Schools turning out people with the wrong skills.** There is a clear discrepancy between the occupational structure of the labour force and employers' needs. This demonstrates a fundamental failure of the education system: those leaving general *gimnázii* account for 13 per cent of the long-term unemployed, while those leaving Vocational *gimnázii* account literally for 33 per cent. This means that vocational schools are teaching skills for jobs for which there is nowhere near enough demand in the labour market.
- **Considerable regional differences.** Unemployment in the various administrative regions of Bulgaria reveals large differences, ranging from 2 per cent in Blagoevgrad and 22.5 per cent in Vidin (2005 figures).
- **A large number of “discouraged” people outside Labour force.** The number of people outside the Labour force which are to be counted as “discouraged” is very high (see below, Section 6.4.6). Their number is nearly as high as the number of those who are counted by statistics as unemployed (meaning that they are trying, more or less actively, to find employment).

6.4.6 Those who have “Given up Hope” as a Target Group for Adult Education

There is one group of persons which is of particular interest for adult education policy: In international (and Bulgarian) statistics, they are referred to as “discouraged”. The definition is: “Persons of 15 years of age and over who want to work but who are not seeking a job, because do not believe they will find one.”⁵⁰ In

⁴⁸ “Long-term” means longer than one year.

⁴⁹ NSI employment data 1/2006 table A-II-7.

⁵⁰ Data on discouraged people are collected as part of the Labour Force Survey, following ILO standards. That means, that interviews are held with a sample of the population, and from the answers the various indicators like employed, unemployed, labour force, not in labour force etc. are derived. According to the usual definitions, Employed (including employers, employees and family workers) and unemployed belong to Labour force. The “discouraged” however are counted as belonging to “outside Labour force”.

other words, these are people of working age who are without jobs and are not actively looking for employment, for example by registering with the Employment Offices, or by taking any other steps to find a job.

As the National Statistics Institute in its Labour Force Surveys finds, the group of discouraged is relatively high in Bulgaria. During recent years, their number varied between 450 000 and 230 000, or 13 to 7 per cent of the people outside Labour force (see Table 6.7). As can be seen from this table as well, the number of “discouraged” is nearly as high as the number of those who are found (by the Labour Force Survey) as unemployed. In some years the number of discouraged was even higher than the number of unemployed. For example, in 4Q2006, there were 286 500 unemployed, and additionally (!) 229 400 discouraged.

Table 6.7

Discouraged persons 2004-2006 ⁵¹			
Quarter	Unemployed (Number)	Discouraged	
		Number	Per cent of those not in labour force
I 2004	428 200	453 400	13.1
II 2004	405 700	368 100	11.1
III 2004	372 000	371 500	11.3
IV 2004	390 400	374 500	11.1
I 2005	361 900	380 600	11.0
II 2005	332 500	324 300	9.7
III 2005	321 900	334 000	10.2
IV 2005	327 400	335 900	10.0
I 2006	314 600	325 000	9.6
II 2006	307 500	272 800	8.5
III 2006	309 800	254 700	8.1
IV 2006	286 500	229 400	7.1

⁵¹ NSI : Zaetost i bezrobotica. Osnovni danni 4/2006, pp. 20 and 21.

This group should be taken into consideration as an important target group of adult education aiming at vocational qualification and motivation to engage in economic activity. This is especially important for the younger ones. According to NSI data, the number of those who have “given up hope” in the age group 15-24 was 84 900 in 2Q2004 and 39 300 in 4Q2006.⁵² An explanation might be that young people abandon the search for work much more swiftly (if they ever start it at all). One of the reasons for this may be that they have fewer opportunities, but others include lack of self-confidence and absence of labour market experience. This all shows that they need further education and skills.

6.5 Education and Poverty

With the support of the World Bank, the Bulgarian National Statistics Institute carried out a study in 2003 to measure living standards.⁵³ This provided a basis for analysing poverty in Bulgaria, differing from standard poverty estimates which normally are around 4 per cent of population during recent years. The World Bank & NSI study finds that 14 per cent of the people in the country live below the official poverty line, which then was 102 leva (around 50 euros) of monthly income (per person equivalent).⁵⁴ There were 1.1 million people living in 409 000 households in Bulgaria who were classified, by these parameters, as poor.

There is a direct correlation between level of education and poverty: people with low levels of education are far more likely to be living in poverty.⁵⁵ But the causality also works in reverse: poor households have considerable difficulties in gaining access to education and training, and in making wise use of such access as they are afforded. Data relating the level of poverty to the level of education of the principal earner in the household (Figure 6.3) prove that a low level of education is highly likely to lead to poverty in the family (45.6 per cent).

A good initial education, on the other hand, almost invariably provides protection from poverty. It is evident that the frequency of poverty in households in which the

⁵² NSI: *Zaetost i Bezrobotica* 4/2006, p. 33.

⁵³ Known by the abbreviation LSMS.

⁵⁴ NSI: *Bălgarija 2003, Socialno i ikonomičesko razvitie*. Sofia 2004. p. 118. – The poverty line is taken to mean the total of outgoings (and income) needed by an individual or a household to avoid poverty and hence for their situation to improve.

⁵⁵ NSI: *Bălgarija 2003, Socialno i ikonomičesko razvitie*. Sofija 2004. p. 121

head of household has completed middle education (*srédno obrazovanie*), but has no vocational training (8.1 per cent) is twice as high as in households in which the head of household has completed both vocational training and middle education (*srédno obrazovanie*) (4.7 per cent). The consequence is obvious: the risk of poverty in a household would be half as great if the principal earner in the household had at least completed eight-year basic education, and a quarter as great if he or she had gained a qualification from a Vocational *gimnázija* or higher education.

A good initial education, on the other hand, almost invariably provides protection from poverty. It is evident that the frequency of poverty in households in which the head of household has completed middle education (*srédno obrazovanie*), but has no vocational training (8.1 per cent) is twice as high as in households in which the head of household has completed both vocational training and middle education (*srédno obrazovanie*) (4.7 per cent).

The consequence is obvious: the risk of poverty in a household would be half as great if the principal earner in the household had at least completed eight-year basic education, and a quarter as great if he or she had gained a qualification from a Vocational *gimnázija* or higher education.

Note: Eurostat in its current publications uses other definitions of poverty. The “At risk of poverty rate”, is based on a comparison of mere financial income. Using a cut-off point of 40 per cent of median equivalised income⁵⁶, the result is that about 4 per cent of Bulgarian population are at risk of poverty. EU25 average is 5 per cent, Germany even has 6 per cent (all figures for 2004), UK was 5 per cent in 2003.⁵⁷

6.6 Summary

The steady upturn of Bulgarian economy, in combination with human resources development, provides a good basis in the medium term for the social and economic prosperity of the country. The Government and society should however be

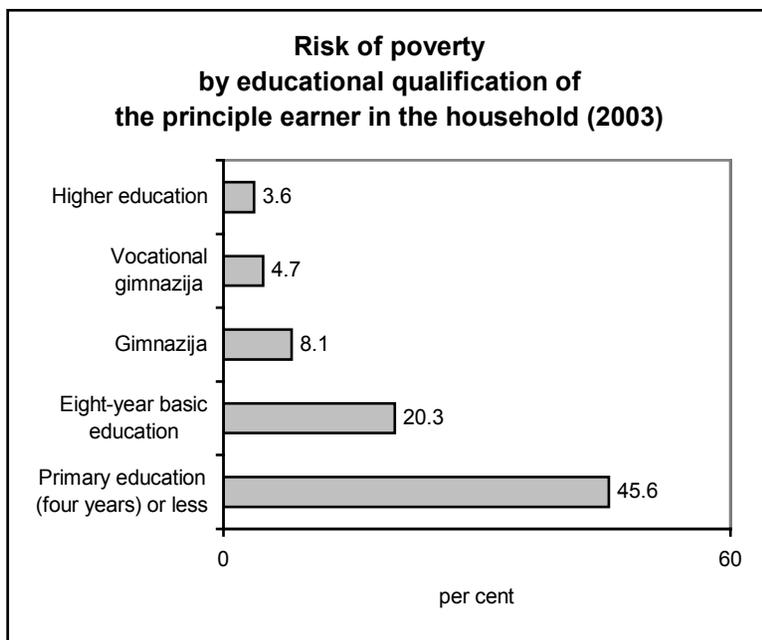
⁵⁶ In other words: “How many people have a monthly income below 40 per cent of the median income?”

⁵⁷ Figures for 2004 were not available von Eurostat in January 2007.

motivated to make greater efforts through the education system. Specific attention needs to be given to combating the shady economy, in which large numbers of people operate outside the official labour market.

The quality of legislation and the enforcement of the law are also inadequate, and better access needs to be achieved to formal, non-formal and informal education for all. Education and vocational training for the illiterate population (mostly Roma) are of prime importance. The quality and competitiveness of training also urgently need to be improved.

Figure 6.3⁵⁸



⁵⁸ Based on the World Bank & NSI study in 2003, mentioned above.

Conclusions

As has been shown in this book, there is a relatively good political, economic, legal and institutional basis for adult education in Bulgaria. This is based on traditions both from socialism and before, last but not least the 19th century.¹ Economic decline and the dilapidation of societal and administrative structures after the fall of socialism however caused a heavy setback to adult education in terms of institutional structure and funding. On the other hand, it paved the way to free adult education of ideological ballast and to link it to international (and European) developments and standards. This process is presently going on partly with help of the EU or other international bodies.

The financial stability and economic upturn in the country, combined with human resources development, should form a sustainable basis for social and economic prosperity in the coming years, on which adult education can build. However, by comparison with EU countries, Bulgaria suffers from considerable economic weakness related to the low baseline for economic development after 1997. The purchasing power of the population in Bulgaria is only a fraction of the EU average. Around 14 per cent of the population, or 1.1 million people in 409 000 households, lived below the poverty line of 102 leva (52 Euro) monthly income in 2003.² The connection between level of education and the risk of poverty clearly shows the need for a policy of promotion and social integration in Bulgaria: education – including adult education – is a crucial factor if Bulgaria is to be tied into the economic and social structures of Europe.

A number of problems stand out in education in general, and in adult education in particular. They will be listed in what follows.

Some Overarching Problems in the Education System

- **Inadequate funding.** One of the problems is the continuing underfunding of the education system as a whole (only 4.9 per cent of GDP spent for education in 2003, of this 4.2 by public funding), combined with an oversupply of teachers

¹ See Section 1 “Looking Back: Adult Education in Bulgaria before 1989” from p. 27.

² See above Section 6.5 “Education and Poverty”, p. 282.

whose very low pay have caused a decline in the quality of school and higher education since 1989.

- **Low levels of effectiveness.** Although numerous reforms have been introduced in recent years in the formal education system, and legislation has been brought in line with that of Europe, the education system in Bulgaria still shows insufficient effectiveness and quality. Some of the training provided in Vocational *gimnázii* does not relate to demand in the labour market, and the structure of areas of education, career paths and subjects which they offer needs to be modified. Furthermore, the relevant Ministries are finding it extremely difficult actually to implement the reforms. Reform programmes are drawn up, but implementation has so far either failed or taken too long.
- **Out dated learning contents and teaching methods.** Generally, the education system is still not giving pupils the practical skills they need, is not fostering independent thinking, and is not teaching the ability to continue learning on one's own. This is a matter of teaching methods and thus of teacher training. There is a continuing shortage of foreign language and computer teaching in schools.³ Government has started several changes concerning language teaching and computer practice in schools, and some positive development is to be expected.
- **Structural problems of higher education.** Higher education is rather fragmented. In the school year 2005/2006 there were 53 individual institutions of higher education⁴, and 40 Vocational colleges (*koléži*) attached to universities or specialist institutes of higher education. They service a population of less than 8 million (not much more than the 7 million inhabitants of London). Bulgarian students can choose from nearly 290 different courses leading to Bachelor's and Master's degrees. Overall, higher education has a lot of quality problems and does hardly meet the needs of the labour market. A change is therefore needed

³ A common indicator is the average number of foreign languages learnt by a pupil during specific stages of education. At ISCED Level 2 this is 1.2 languages in Bulgaria, and at ISCED Level 3 this is 1.7 languages. Thus, both indicators continue to be below their European median. (Eurostat database, most recent data for 2004.)

⁴ NSI data. The figure comprises 28 institutions named "university", the remaining being named "academy" or "school for...", and 10 independent (meaning: not attached to something like an university) colleges (*koléži*). – An official list of higher education institutions (as for January 2007, with only 51 entries) is added to the Appendix, p. 316.

in the structure of the areas of education, career paths and subjects offered by higher education.

- **Roma inclusion.** Although there are many efforts both of the government and of civil society institutions (including Roma NGO) to improve access to education for Roma, Roma children continue to have very bad chances to get an acceptable level of formal education.

Facilities Available for Lifelong Learning in Bulgaria

- **Existing institutional networks.** The cultural centres (*čitálišta*), the Houses of Science and Technology (DNT), the *Zhánie* associations and the trade unions offer adult education in Bulgaria a whole range of different institutional networks on which to build in order to provide lifelong learning. It is the cultural centres (*čitálišta*) that offer particular promise for mass education throughout the lifespan because of their traditions, some of which go back to the early 19th century, their presence throughout the country, even down to the smallest villages, the high esteem in which they are held by the population, and their unique legal status.
- **Great respect for education.** Schooling, education and learning have enjoyed great respect among Bulgarians since the 19th century. The struggle to secede from the Ottoman Empire, to which the territory of Bulgaria belonged until the start of the 20th century, was first expressed through a mental alignment with the thinking of Western Europe, and hence also with the forms of education and schooling that had developed there. For a long time, the schoolteacher, like the parish priest, was held up as a widely respected model, despite the celebrated financial hardships of that profession. Elements of a consciously constructed national mythology can be seen in this, but in the final analysis it is immaterial whether the great respect for education rests on real or fabricated history. In either case, the notion is present in the nation's consciousness. (Admittedly this applies particularly to the titular nationality, while minorities such as the Roma and the Turks do not share it to the same degree.)
- **High degree of self-criticism and willingness to reform.** There has seldom been a shortage of self-criticism in Bulgaria, even though this may not penetrate outside. It nonetheless brings with it a willingness to identify and rectify existing

shortcomings. The realization that the education system needs thorough overhaul has in fact become common currency in Bulgaria in recent years, and there is a general willingness to accept help for this process from the European Union. Problems with the implementation of planned reforms are certainly not a peculiarly Bulgarian phenomenon.

Specific Problems of Adult Education

- **The concept of lifelong learning still not very widespread.** Adult education is essentially not a new field for Bulgaria, or for the Bulgarian formal and non-formal education system. By comparison with the modern European understanding of education and its functions (the Bologna Process), however, lifelong learning and hence adult education are not very widespread. The formal education system itself has to date offered few flexible models of education and training (such as distance education) to allow learning to continue easily throughout life. The current formal system also fails to encourage independent thinking in students, which might serve as a basis for them to update their knowledge and skills later on for themselves. This is allied with the low level of digital literacy⁵ (0.3 per cent of the total population, as measured in the year 2002/2003). According to an international study on the spread of the information society,⁶ this proportion was then 0.8 per cent in the EU15 states, 1.5 per cent in the United States, 0.6 per cent in the Czech Republic, and 0.7 per cent in Estonia and Slovenia. Romania, Poland and Hungary were, like Bulgaria, well behind, on 0.3 per cent.
- **Low participation by adults in educational activities.** Participation by the population aged 16 years and over in formal education programmes is far below the EU average. The same applies to participation in non-formal education. Similarly, adults show no great willingness to learn for themselves (through self-directed learning). The low involvement in formal, non-formal or self-directed learning of the unemployed and people with lower levels of education (no more

⁵ The idea of “digital literacy” embraces the ability to instal software, to communicate via the Internet, to find sources of information and to work with search engines.

⁶ Measuring the Information Society in the EU and EU Accession Countries, Switzerland and the US. SIBIS (Statistical Indicators Benchmarking the Information Society) 2002/2003. See http://www.sibis-eu.org/statistics/stat_ind.htm.

than middle education)⁷ demonstrates a lack of motivation which may be interpreted as an after-effect of the socialist era.

- **Lack of demand orientation and needs analysis in vocational training.** There is as yet no satisfactory way of assessing demand for particular vocational skills at local and national level so that adjustments can be made. Collaboration between the institutions involved is not adequate.
- **Lack of practical competencies of vocational training graduates.** In the traditional institutions of vocational education, teaching concentrates too much on theoretical instruction. Practical training is not enough advanced, both because of obsolete methodology and of many years of underfunding, resulting in outdated equipment.
- **Vocational training short of money.** Inservice vocational training at Vocational schools, Vocational *gimnázii* and Vocational colleges in the formal education system is marked by demotivating financial conditions, inadequate training of teachers and antiquated equipment.
- **Too little in-house inservice training.** Inservice training in enterprises is far less widespread than in EU countries. In the long term, the inactivity of employers in education and training will have its repercussions: When the economic level of the country rises, the workers who have until now been relatively highly skilled will no longer be adequate. Employers would be well advised to invest in the future. Consulting in order to foster on-the-job training and continuing education therefore should be one of the major aims of adult education policy in Bulgaria.
- **Vocational orientation** is an important element of Lifelong learning. Experts say, that in Bulgaria there is need of an improved uniform system of vocational orientation which includes early vocational orientation and better coordination of the current activities.
- **Lack of co-operation between public players and social partners.** Especially employers are not yet used to co-operate in tripartite commissions and other forms of civic negotiation which help to balance interests and needs, not least of all in the field of vocational education.

⁷ Adequate to date for admission to higher education.

- **Lack of centralized information about adult education.** The legal requirements for adult education are in place in Bulgaria. It is still too early to make any judgment about the practical aspects of this legislation. But there is a shortage of generally accessible information about results to date. In order to reach a fuller assessment, it would be necessary to approach a large number of individual educational institutions and to ask their representatives about how they actually work.
- **Little civic education.** Political and cultural education does not play much part in post socialist Bulgarian society. As in other states of the former Eastern Bloc, this is partly a result of lacking civil society during the years of the totalitarian regime. Partly it is a result of the economical problems that affected private and public life during the past 15 years.

Adult Education Faces Different Challenges:

- **Fighting Illiteracy.** Despite the relatively high level of education among the population, which has in the past been comparable to that in the EU countries, there is an urgent need to educate and train around 48 000 people who are illiterate and 31 000 who have not completed eight-year basic education. Continuing education or training is also necessary for some of those who have completed eight-year basic education. Although basic education is theoretically compulsory, it is a frequent occurrence in some groups of the population that children do not go to school or that they drop out of the education system early.
- **Enabling people for employment.** Although employment has been rising during recent years, the supply of labour in Bulgaria is still substantially higher than the demand. The number of people outside the labour force (the non-working population) is very high: it is only just smaller than the working population (which is a sign that there is a widespread black economy). The number of unemployed people who are not registered but would like to work is almost as high as the number of registered unemployed. Both groups are genuine potential participants in various forms of adult education.
- **Involving the social partners.** As shown in Chapter 4.5, Bulgarian employers do relatively little for continuing education of their employees. During recent years they even have been reacting very reluctantly to invitations to take part in discussions with the relevant Ministries. Nor are foreign companies any more

active in the matter. The tripartite commissions called for by the EU, the purpose of which is to bring together government, employers and employees or their umbrella organizations around one table to settle major social issues, are not very effective in Bulgaria as well: the employers are not interested, the trade unions are weak because the public underestimate the importance of strong, organized representation, and the Ministries for their part do not always have sufficiently competent staff, which is not surprising given the levels of salaries. Thus, an important task of adult education policy must be to pave the way for more advanced forms of multilateral decision making.

- **Overcoming structural problems in the labour market.** Education and training are needed by the working population, and especially the unemployed, if various structural problems in the labour market are to be overcome. This is particularly because of high unemployment among young people, those with low levels of education (people who have attended school for eight years or less) and the Roma, and the large number of long-term unemployed. Some of the unemployed who have completed middle education (*srédno obrazovanie*) or Vocational *gimnázija* education and have a Level 2 or 3 vocational qualification need retraining because there is not sufficient demand in the labour market for the occupations in which they trained.
- **Open new ways for those having given up hope.** One important target group for adult education is group of “discouraged” (statistically counted as outside labour force, and therefore not included in the official number of unemployed). They have stopped, or never begun, looking for work, although they are in principle available for employment.⁸ They are held back by problems with skills and motivation. Adult education can help to activate and motivate these people for the labour market.

⁸ See p. 280.

Recommendations

At bottom it should be remembered that the process of transforming the Bulgarian education system is proceeding *relatively* well despite the difficult starting point. This means that it is going in the right direction. However, reforms do need to be pursued more actively since the pace so far places an additional burden on the whole of society – never-ending reform is sometimes worse than none at all. In the future, it will be necessary:

- To **recognise adult education** as the fourth pillar of the education system alongside school, university and vocational training, if at all possible by means of a separate Adult Education Act that resolves outstanding questions. Care should be taken, however, not to complicate yet further the existing unsystematic and contradictory patchwork of legislation and responsibilities.
- To ensure that future education projects are preceded by **exact needs analysis** carried out in close association with the EU. They will require a clear line and a precise remit. Effective **checking of outcomes** is also needed. It is by no means adequate to oblige project sponsors to write final reports as they think fit; sampling and continuous scientific evaluation will be of more use.
- To lay greater emphasis on issues of **gender roles** in society. Existing traditional arrangements place a double burden on women since they are required not only to work – which has been an automatic expectation since the socialist era – but also to take responsibility for children, family and care of the elderly. Adult education should contribute to a fairer division of tasks. And, by the way, women in Bulgaria are by far less paid than men.
- To acknowledge that **good education costs money**. Salaries for those employed in the education system must rise with the demands placed on them, since there will otherwise be no real material basis or motivation.
- To create **better access** to formal, non-formal and informal education for all. Education and training for those who are illiterate (especially Roma) are of greatest importance.
- The need for **political education** or civic education is also obvious. It is not enough to give the inhabitants of Eastern and South East European countries vocational training, however advanced this may be. A democratic society needs democratic ways of behaving, i.e., methods of resolving conflicts peacefully, a

sense of human rights, certain standards in dealing with minorities, and an understanding of the purpose of involvement in society and politics. None of these things comes by itself; they have to be fostered. Adult education can play an important part in this – alongside schools and the parental home, and a respective underpinning by legal provisions.

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Bulgarian-English Educational Terminology

The following list explains a number of important Bulgarian educational terms. We have already alluded to the difficulty of translating some of these into English in the Introduction (from p. 17). It is not always practicable to translate them directly, in which case they may be translated in several different ways depending on the context. The international use of terminology is a matter that is still largely unresolved. In Bulgaria, a loose group of experts drawn from institutions, authorities and NGOs is currently attempting to compile a standardized list of terms and their equivalents in various European languages, but this will take some considerable time. The translations suggested here only cover terms that occur in this book.

Bulgarian (transliterated)	Translation(s) (may vary according to context)
<i>bakalávǎrska stépen bakalávǎr</i>	Bachelor's (degree), Bachelor
<i>magístǎrska stépen magístǎr</i>	Master's (degree), MA, Master
<i>vísše učébnó zavedénie</i>	Higher education institution (in the most general sense, including several sub-types)
<i>universitét</i>	University (for details of the definition in Bulgaria see p. 90)
<i>specializírano vísše učilište</i>	Specialist institute of higher education (not to be confused with a college of vocational higher education = <i>koléž</i>)
<i>osnóvno obrazovánie</i>	Basic education (ISCED 2) Eight-year basic education Primary and lower secondary education (Certificate of) completion of basic education

<i>srédno obrazovánie</i>	Middle education ¹ Upper secondary education (ISCED 3) Upper secondary leaving examination
<i>načálno obrazovánie</i>	Primary education (ISCED 1) (Certificate of) completion of primary education, comprising 4 years
<i>načálno učilište</i>	Primary school, or Primary school level classes of a Middle school
<i>profesionálnen koléž</i>	Vocational college providing VET Level 4, admission requiring completion of middle (upper secondary) education
<i>koléž</i>	College of vocational higher education (Type of higher education leading to the qualification „Specialist of.../ <i>specialist po...</i> “, ISCED 5B)
<i>dóktorska stépen dóktor</i>	Doctorate, PhD (ISCED 6)
<i>profesionálno učilište</i>	Vocational school – not to be confused with vocational schools (with all lower case letters) which we used as a hypernym for all types of schools providing vocational education: Vocational schools, Vocational <i>gimnázii</i> and Vocational colleges.
<i>ikonomičeski aktívno naselénie</i>	Economically active population Working population Labour force
<i>načálno profesionálno obrazovánie i obučénie; načálno profesionálno obučénie</i>	Initial vocational education and training (VET) Preservice vocational education and training (The lowest levels of vocational training that can be acquired in the state education and training system)
<i>téxnikum (Plural: <i>téxnikumi</i>)</i>	<i>Téxnikum</i> (type of school formerly providing middle education and Level 3 vocational training, now subsumed into Vocational <i>gimnázii</i>)

¹ Granting admission to higher education until the change-over to the yet planned centralized upper secondary leaving examination, which will make higher education entry dependent on a separate (centralized) examination (called *matúra*).

<i>gimnázija</i> (Plural: <i>gimnázii</i>)	<i>Gimnázija</i> (General) upper secondary school (serving Years 9 to 12, providing general education)
<i>Profesionálna gimnázija</i>	Vocational <i>gimnázija</i> (serving Years 8 or 9 to 12 or 13, providing general education at ISCED level 3A and national VET Level 2 or 3)
<i>SPTU (srédno profesionálno texníčesko učilište)</i>	SPTU Technical middle (upper secondary) school (type of school formerly providing middle education at ISCED level 3A and national VET Level 2, now subsumed into Vocational <i>gimnázii</i>)
<i>PTU (profesionálno texníčesko učilište)</i>	Technical vocational school (former name of present-day vocational schools)
<i>Agéncija po zaetostá</i>	(National) Employment Agency Local branches are known as <i>bjurá po trudá</i> ; we refer to these as “employment offices”
<i>Regionálnii inspektoráti po obrazovániето</i>	Regional school inspectorates Regional education departments (= Local education authorities)

Abbreviations

AZ	<i>Agéncija po zaetosttá</i> – Employment Agency (the centralized national agency; the regional employment offices are called <i>bjurá po trudá</i>)
BSK	<i>Bálgarska stopánska kámara</i> – Bulgarian Chamber of Commerce
BTPP	<i>Bálgarska tárgóvsko-promíšlena paláta</i> – Bulgarian Chamber of Industry and Trade
CPO	<i>Centár za profesionálno obučenie</i> – Vocational training centre
CVTS	Continuing Vocational Training Survey
EU	European Union
Eurostat	(Directorate General of the European Commission) European Statistics Office
FNTS	<i>Federácija na náučno-texníčeskite sájúzi</i> – Federation of Scientific-Technical Associations; Federation of Engineers Associations
ISCED	International Standard Classification of Education
GDP	Gross Domestic Product
KNSB	<i>Konfederácija na nezavisimite sindikáti</i> – Confederation of Independent Trade Unions; the bigger one of the two important trade union associations
LFS	Labour Force Survey, published by NSI
LSMS	Living Standard Measurement Survey
MON	<i>Ministérstvo na obrazovániето i náúkata</i> – Ministry of Education and Science
MTSP	<i>Ministérstvo na trudá i sociálnata politíka</i> – Ministry of Labour and Social Policy
NAPOO	<i>Nacionálna agéncija za profesionálno obrazovánie i obučenie</i> – National Agency for Vocational Education and Training; common is as well the English abbreviation NAVET
NIO	<i>Nacionálen institút po obrazovánie</i> – National Institute of Education
NPiP	Nacionálen plan za ikonomičesko razvítie – National Economic Development Plan
NPO	<i>Nepравítelstvena organizácija</i> – a) like NGO b) Association under Bulgarian law
NSI	<i>Nacionálen statističeski institút</i> – Bulgarian National Statistics Institute
NTS	<i>Náučno-texníčeski sájúzi</i> – Scientific-technical associations; associations of engineers, see FNTS

OECD	Organisation for Economic Co-operation and Development
POO	<i>Profesionálno obrazovanie i obučenie</i> – Vocational education and training (VET)
PPO	<i>Prodžívašto profesionálno obučenie</i> – Continuing vocational education and training; inservice training
UNDP	United Nations Development Program
ZPOO	<i>Zakón za profesionálno obrazovanie i obučenie</i> – Vocational Education and Training Act
ZNČ	<i>Zakón za národnite čítališta</i> – (National) Cultural Centres Act
ZVO	<i>Zakón za vísšeto obrazovanie</i> – Higher Education Act
ZNP	<i>Zakón za národnata prosvéta</i> – (National) Education Act
ZJuLNC	<i>Zakón za juridičeskite licá s néstopanska cel</i> – Non-Profit Making Legal Persons Act; Associations Act

Explanatory Note on the Bulgarian Law on Associations

The first point to bear in mind with respect to voluntary associations in Bulgaria is that the law currently recognises a variety of different types of legal status:

First, there are “non-profit making legal persons” (*juridičeski licá s néstopanska cel*). These are governed by the Associations Act (*zakón za juridičeskite licá s néstopanska cel*, ZJuLNC), which divides them into *sduženija* (associations) and *fondácii* (foundations)). Both may also acquire the status of being of public benefit if they fulfil certain additional requirements. Organizations recognised as being of public benefit (serving the public good) are subject to stricter control, and are registered centrally with the Ministry of Justice. The others (those not recognised as being of public benefit) are registered instead with the local courts. It is therefore difficult to establish how many of them there are.

Secondly, there are the cultural centres (*čítališta*), which are governed by their own separate Act.² These should in principle be self-governing, however, are generally closely associated with the local authorities, which play a particular role in maintaining cultural centres. They are described in the Act per se as “non-profit

² *Zakón za národnite čítališta* – Cultural Centres Act.

making legal persons” and enjoy financial advantages in such areas as taxation and national and local government subsidies.

Thirdly, there are the religious communities, for the recognition of which a separate law has been passed.³

The legal regulation of associations, organizations and similar groupings is therefore clear. However, there is the difficulty that the abbreviation NPO (for *nepravitelstvena organizacija* = non-governmental organization) has become common in daily use in recent years in Bulgaria. This abbreviation, and indeed the term *népravitelstvena organizacija*, do not appear in the Bulgarian Associations Act-. Anyway, it is generally used to refer to any kind of association, organization, etc. The word is very similar to the English “NGO”, and this is presumably one of the main reasons why it is in vogue. But whenever a Bulgarian says “NPO”, this may mean a variety of things:

- 1) Usually what is meant will be the “non-profit making legal persons” (i.e. *sduženija* and *fondácii*) described in the Act. Cultural centres might also be included since they have a similar status, albeit under a different piece of legislation.
- 2) “NPO” may also be used in quite a different sense, however, namely as the Bulgarian translation of the English “NGO”. This is confusing since NPO (in the sense of “non-profit making legal person” under Bulgarian law) and NGO (the international term for “non-governmental organization”) are not identical in meaning. The widely used international term NGO refers to organizations with distinct ethical aims, the ethic of which is associated with the concept of the civil society, although the precise *legal status* of the NGO in question is not specified by the use of the term – if only because this legal status will depend on national legislation. At the same time, not every organization granted legal recognition as an association in an individual state would be regarded internationally as a NGO. That said, it is often the case of course that an organization registered under national legislation, in Bulgaria, for example, does bear the characteristics of a NGO in the international sense and can therefore quite properly be referred to by that term.

³ *Zakón za véroizpovedánijata* – Konfessionsgesetz

Hence, a muddle of terms has grown up to denote two quite distinct phenomena of political life (NGO and NPO):

- 1) „NPO“ to describe the legal status defined in the Bulgarian Associations Act, even though the Act itself refers to them by different names (*juridickéskí licá s néstopanska cel*, non-profit making legal persons).
- 2) „NGO“ as a translation of (1) in non-Bulgarian texts, but also as a synonym for (1) in Bulgarian texts.
- 3) „NGO“ to describe ethically motivated organizations in accordance with the internationally established definition.
- 4) „NPO“ as the Bulgarian translation of NGO in the sense of (3).

Sometimes, (1) and (3) coincide when an association is registered under Bulgarian law (as a non-profit making legal person) and simultaneously fulfils the fairly clear criteria for being regarded (internationally) as a NGO because of its aims and activities. As a result there are two further possible relationships between a term and what it describes:

- 5) „NPO“ to describe a “non-profit making legal person” (under Bulgarian law) which at the same time fulfils the criteria for being a NGO (as the term is used internationally).
- 6) „NGO“ as a synonym for (5).

In order to avoid this lack of clarity, we use the following terminology:

- **NPO:** associations under Bulgarian law (i.e. *fondácii* and *sduženija*, under the *Zakón za juridickéskite licá s néstopanska cel*).
- **NGO:** NGO in the established international sense, regardless of their legal status in Bulgaria and elsewhere.
- **Cultural centres:** *čitálišta* under Bulgarian law (*Zakón za naródnite čitálišta*).
- **Religious communities:** Religious communities regardless of the detail of how they are legally constituted.
- **Associations / organizations:** A portmanteau term to cover NPOs and NGOs, but not cultural centres and religious communities.

Supplementary Tables

Table 1: Educational Structure of Adults in Europe

Educational structure of population aged 25 to 64 years in Europe (2002), percentages ¹⁾				
	ISCED 97 level of education			
	Primary education or less	Secondary education	Higher education	Total
Portugal	79	11	9	100
Spain	58	17	24	100
Italy	56	34	10	100
Greece	47	35	18	100
Belgium	40	32	28	100
Ireland	40	35	25	100
Luxembourg	38	43	19	100
France	36	41	24	100
Netherlands	32	43	25	100
Finland	25	42	32	100
Austria	22	61	17	100
Denmark	20	53	27	100
Sweden	19	55	26	100
Germany	17	61	22	100
UK			29	100
EU 15 overall	38	41	21	100
Countries joining EU in 2004 ²⁾				
Cyprus	34	37	29	100
Hungary	29	57	14	100
Slovenia	23	62	15	100
Poland	19	69	12	100
Latvia	17	63	20	100
Lithuania	15	41	44	100
Slovakia	14	75	11	100
Estonia	13	58	30	100
Czech Republik	12	76	12	100

Continued from previous page				
Countries joining EU in 2007				
	Primary or less	Secondary education	Higher education	Total
Romania	29	61	10	100
Bulgaria 1998	34	48	18	100
1999	32	50	18	100
2000	32	50	18	100
2001	29	50	21	100
2002	28	51	21	100
2003	29	50	22	100
2004	28	50	22 ³	100
2005	28	51	22 ³	101

Notes on Table 1:

- 1) Figures from the EU Commission report "Education across Europe 2003", from Eurostat 2003 and from the NSI *Obrazovanie* 2006 (print edition), p. 34.
- 2) Figures for Malta were not available.
- 3) The 22 per cent *higher education* consist of 17 per cent university and 5 per cent college (*koléž*). The share of college students has been decreasing slightly during the last years. In 2000 of 18 per cent overall higher education, 12 percentage points were from universities and 6 from colleges.

Notes on Table 2:

- 1) NSI: *Socialno-ikonomičesko razvitie, Bălgarija* 2002, p. 311.
- 2) Middle education pursued at a *texnikum* (now a Vocational *gimázija*) or an Art school, at which the vocational training extends another two years after completion of upper secondary "middle" education (*srédno obrazovanie*). This equates to ISCED 4. The designation "specialist middle education" (*srédno speciálno obrazovanie*) is no longer used officially, but is still common in everyday speech because the official designations are too long. The official terms are now "middle education with third-level vocational training" (*srédno profesionálno obrazovanie s tréta stépen na profesionálnata kvalifikácija*, i.e. ISCED 3) and "vocational education after completion of middle education with fourth-level vocational training" (*profesionálno obučenie sled srédno obrazovanie s četvărta stépen na profesionálna kvalifikácija*, i.e. ISCED 4).
- 3) *Srédno profesionálno-techničesko učilište* = Technical middle school.
- 4) *Profesionálno-techničesko učilište* = technical vocational school (teaching basic education only alongside vocational training, not middle education).

Table 2: Educational qualifications by ethnic origin in Bulgaria (absolute)

Educational qualifications of the population aged 25-64 years, by ethnic origin in Bulgaria (as at 1.3.2001) ¹⁾							
Highest educational qualification	Overall	Ethnic self-assessment					
		Bulgarians	Turks	Roma	Others	Neutral	Not stated
Higher Education ISCED 5B, 5A, 6	882 795	856 715	10 488	443	12 354	2795	
Higher ed. ISCED 5A, 6	613 437	597 219	4 805	202	9 311	1900	
Doctorate	10 784	10 434	16		287	47	
Master's	586287	571 155	4 260	187	8 908	1777	
Bachelor's	16366	15 630	529	15	116	76	
Higher ed. ISCED 5B (= „Specialist“ degree)	269358	259 496	5 683	241	3 043	895	
Middle ed. ISCED 3 and 4	2 063 011	1 930 222	92 431	11 075	18 246	11 037	
With specialization ²⁾	990 480	943 571	30 859	2 930	8 684	4 436	
SPTU ³⁾	608 114	551 327	43 309	5 689	4 006	3 783	
<i>Gimnázija</i>	464 417	435 324	18 263	2 456	5 556	2 818	
Basic ed. ISCED 2	1 051 338	752 683	207 507	71 521	7 948	11 679	
General basic ed.	972 256	683 402	200 321	69 959	7 296	11 278	
Technical vocational ed. (PTU) ⁴⁾	79 082	69 281	7 186	1 562	652	401	
Primary ed. ISCED 1	182 111	75 232	58 486	43819	1610	2964	
Primary ed. not completed	30 727	9 099	8 277	12445	281	625	
Illiterate	49 745	14 401	13 562	20341	379	1062	
Not stated	10 122						10 122
Total	4 269 849	3 638 352	390 751	1 596 44	40 818	30 162	10 122

Table 3: Educational qualifications by ethnic origin in Bulgaria (percentages)

Educational qualifications of the population aged 25-64 years, by ethnic origin in Bulgaria (as at 1.3.2001), percentages							
Highest educational qualification	Overall	Ethnic self-assessment					
		Bulgarians	Turks	Roma	Others	No origin given	not stated
Higher ed. ISCED 5B, 5A, 6	20.7	23.5	2.7	0.3	30.3	9.3	20.7
Higher ed. ISCED 5A, 6	14.4	16.4	1.2	0.1	22.8	6.2	14.4
Doctorate	0.3	0.3	0.0	-	0.7	0.2	0.3
Master's	13.7	15.7	1.1	0.1	21.8	5.8	13.7
Bachelor's	0.4	0.4	0.1	0.0	0.3	0.3	0.4
Higher ed. ISCED 5B	6.3	7.1	1.5	0.2	7.5	3.0	6.3
Middle ed. ISCED 3 and 4	48.3	53.0	23.7	6.9	44.7	36.6	48.3
With specialization ¹⁾	23.2	25.8	7.9	1.8	21.3	14.7	23.2
SPTU ²⁾	14.2	15.2	11.1	3.6	9.8	12.5	14.2
<i>Gimnázija</i>	10.9	12.0	4.7	1.5	13.6	9.3	10.9
Basic ed. ISCED 2	24.6	20.7	53.0	44.9	19.5	38.7	24.6
PTU ³⁾	1.9	1.9	1.8	1.0	1.6	1.3	1.9
Basic education	22.7	18.8	51.2	43.9	17.9	37.4	22.7
Primary ed. ISCED 1	4.3	2.1	15.0	27.4	3.9	9.8	4.3
Primary ed. not completed	0.7	0.3	2.1	7.8	0.7	2.1	0.7
Illiterate	1.2	0.4	3.5	12.7	0.9	3.5	1.2
Not stated	0.2	-	-	-	-	-	0.2
Total	100	100	100	100	100	100	100

Notes on Table 3:

- 1) See Table 2, Footnote 2.
- 2) See Table 2, Footnote 3.
- 3) See Table 2, Footnote 4.

Table 4: Educational qualifications by ethnic origin in Bulgaria in 1946

Educational qualifications of 25-59-year-olds by ethnic origin, as at 31.12.1946, percentages					
Educational qualifications	Overall	By ethnic origin			
		Bul- garians	Turks	Roma	Other
Total	100.0	100.0	100.0	100.0	100.0
Higher education	1.6	1.8	0.0	0.0	3.9
Upper secondary education	5.0	5.2	0.3	0.0	17.0
Basic education	15.2	16.4	2.4	0.8	30.1
Primary education	41.1	44.5	14.2	6.6	24.0
Primary education not completed, and self-taught	14.0	14.9	5.8	7.7	9.7
Illiterate	23.1	17.2	77.2	84.9	15.2
Not stated	0.0	0.0	0.0	0.0	0.1

Table 5: Number of students 1999-2006

Pupil and students numbers in Bulgaria (in 1000s) ¹⁾							
	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	1569.0	1522.4	1474.1	1475.2	1451.3	1419.4	1398.7
Pre-primary education	211.9	200.5	199.2	201.3	201.1	202.8	206.2
Primary education	392.9	374.4	349.6	333.0	314.2	290.0	273.0
Lower secondary ed. (V-VIII)	367.1	366.0	358.5	348.3	330.4	312.4	295.2
Upper secondary (IX-XIII)	329.0	329.4	334.8	358.9	374.3	373.2	367.3
Vocational college	6.8	5.1	3.6	3.2	2.8	3.0	2.8
Higher ed. (overall)	261.3	247.0	228.4	230.5	228.5	237.9	243.5
“Specialist”	18.4	16.4	16.6	14.8	16.3	18.4	23.6
Bachelor’s and Master’s	239.8	227.2	207.8	211.3	207.3	214.4	214.7
Doctorate	3.1	3.4	4.0	4.4	4.8	5.0	5.2

Notes on Table 5:

1) www.nsi.bg/SocialActivities/Education.htm

Table 6: Educational activity of the population in Europe

Participation by the population in educational activities in Europe (2001) ¹⁾			
	Learners in each age group, as a percentage of the entire age group		
	5-14 years	15-19 years	20-29 years
EU 15	99.2	81.4	23.3
Austria	98.7	76.9	18.6
Belgium	100.2	91.0	26.5
UK	98.7	74.7	23.3
Germany	100.1	89.4	24.2
Greece	98.1	77.0	23.8
Denmark	97.2	82.9	31.5
Ireland	100.6	80.9	16.6
Spain	103.6	80.1	23.5
Italy	99.4	72.2	17.1
Luxembourg	92.2	78.1	6.0
Netherlands	99.3	86.2	24.3
Portugal	107.0	73.3	21.7
Finland	93.5	85.3	39.2
France	101.0	86.6	19.6
Sweden	98.1	86.4	33.0
Poland	94.3	85.5	25.8
Hungary	99.4	79.0	20.0
Czech Republic	99.8	87.8	14.7
Bulgaria 1998	93.8	61.5	16.8
Bulgaria 2001	96.1	65.3	14.5
Bulgaria 2002	98.0	70.5	15.2
Bulgaria 2003	98.2	74.2	15.4

Table 7: Correlation between vocational training and unemployment

Unemployment among people with higher or middle education and a vocational qualification (ISCED 3A) in Bulgaria, 2 nd quarter 2004 Measured as the percentage of persons unemployed among those possessing the qualification concerned				
Area of vocational training	Overall	Bachelor's and Master's	„Specialist“ degree	Middle education with vocational specialization; SPTU ¹⁾
Education and teaching	7.4	7	8	
Humanities and arts	7.7	5.7	8.7	15.3
Social sciences, business and law	9.1	7	2.4	12.9
Natural sciences, mathematics and computing	6.8	7.9		
Engineering, manufacturing and construction	10.9	5.9	6.2	12.1
Agriculture and veterinary medicine	13.4	10		14.7
Medicine and welfare	3.3	1.7	4.8	
Services	11.8	5.1	9.4	14.9
Total	9.9	6.2	6	12.3

Note on Table 6:

1) OECD: Education at a Glance. OECD Indicators 2003; and figures from the Bulgarian National Statistics Institute.

Percentages over 100 may occur because the population is generally only counted at intervals of several years, and is calculated in between from births and deaths, while pupil and student numbers are recorded each year. If immigration is not taken into account in the calculation, the figure for “inhabitants aged 5 to 14 years” may be lower than that for “pupils aged 5 to 14 years” because immigrant children are generally captured in educational statistics but not in population statistics. In many countries (e.g. Belgium), it is also a factor that children living in neighbouring states (Luxembourg) may go to school there.

Note on Table 7:

1) See Table 5, Footnote 1

Table 8: Number of educational institutions 1999-2006

Number of educational institutions, state and private														
	1999/2000		2000/01		2001/02		2002/03		2003/04		2004/05		2005/06	
		Total	Of which private	Total										
Total	7181	111	6791	113	6746	126	6534	132	6648	128	6638	141	6675	254
Kindergartens	3434	18	3249	18	3242	22	3127	20	3278	24	3301	26	3331	34
General schools total (including special schools at the respective levels)	3157	52	2981	54	2948	55	2852	59	2823	54	2784	56	2757	59
Primary schools (Years 1-4)	441	6	379	7	372	8	325	9	315	6	295	5	277	4
Basic schools (1-8)	2075	23	1966	22	1950	20	1901	19	1892	18	1877	22	1872	22
Lower secondary <i>progimnázii</i> (5-8)	23	2	23	2	22	2	22	2	22	1	21	2	21	3
<i>Gimnázii</i> and profile <i>gimnázii</i> (9-12/13)	159	17	163	19	160	21	161	23	165	24	167	23	168	26
SOU (Middle schools with a full curriculum, Years 1 to 12/13)	405	4	402	4	401	4	406	6	395	5	424	4	419	4
Middle schools (without primary ed., Years 5 to 12/13)	54		48		43		37		34					

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	1999/01		2000/01		2001/02		2002/03		2003/04		2004/05		2005/06	
	Total	Of which private												
Vocational institutions overall	545	35	516	35	506	38	504	39	496	36	500	43	495	43
Art schools	19	-	18	-	18	-	19	1	19	1	19	1	20	1
Vocational gimnázii (Until 2002/03 = <i>textnikum</i> and SPTU))	500	22	476	22	470	24	463	24	457	24	459	26	453	25
Vocational colleges (post-secondary)	23	13	18	13	15	14	18	14	13	11	17	16	17	17
Vocational schools (until 2002/03 = PTU)	3	-	4	-	3	-	4	-	7	-	5	-	5	-
Higher education overall	45	6	45	6	50	11	51	14	51	14	53	16	53	16*
Colleges of vocational higher education (<i>koléž</i>)	4	2	4	2	8	6	9	7	9	7	10	9	10	9
Vocational courses (<i>koléž</i>) at universities	43	4	43	4	40	-	40	-	41	-	40	-	40	-
Universities and specialist institutes of higher education	41	4	41	4	42	5	42	7	42	7	43	7	43	7

* For 2006/2007, there were only 51, the number of the private ones having been reduced from 16 to 14.

Table 9: Higher education students and their fields of learning

Subjects of bachelor and master students in Bulgarian higher education (percentage)					
Fields of education	2000/01	2001/02	2002/03	2003/04	2004/05
Business and administration	21.3	21.9	23.0	23.4	24.0
Engineering and engineering trades	16.3	17.5	16.9	17.0	16.5
Social and behavioural science	12.5	12.9	12.9	12.4	12.5
Teacher training and education science	11.2	9.4	9.6	8.5	7.6
Humanities	7.5	7.3	6.7	6.5	6.1
Law	5.7	5.3	5.6	5.3	5.2
Health	3.5	3.5	3.3	3.5	3.7
Arts	2.3	2.4	2.5	2.5	2.7
Architecture and building	2.7	2.8	2.7	2.7	2.6
Computing	1.9	2.2	2.2	2.4	2.5
Manufacturing and processing	2.0	2.1	2.0	2.0	1.9
Physical sciences	1.7	1.6	1.7	1.5	1.8
Agriculture and forestry	1.5	1.5	1.4	1.7	1.5
Journalism and information	0.8	0.6	0.6	0.9	1.4
Social services	1.2	1.2	1.2	1.2	1.2
Life sciences	0.7	0.6	0.8	0.8	0.9
Veterinary	0.6	0.7	0.7	0.7	0.7
Mathematics	0.6	0.5	0.5	0.5	0.5
Personal services	2.0	2.2	2.5	2.7	2.9
Transport	0.7	0.8	0.9	1.0	1.0
Environmental protection	1.2	1.2	0.9	1.0	0.8
Security services	1.9	1.4	1.3	1.5	1.7
Not known and unspecified	0.2	0.1	0.1	0.2	0.2
Total	100 %				

Source: NSI, *Образование в Република България* [Education in the Republic of Bulgaria] 2005. Sofia 2006.

Table 10: Vocational education graduates 2000-2005

Graduates of vocational qualification in vocational schools						
	2000	2001	2002	2003	2004	2005
Overall	51 996	46 735	36 205	34 622	36 442	33 595
In programmes for VET Level III ⁽¹⁾	28 439	27 871	29 533	1 637	11 134	10 628
In programmes for VET Level IV, starting after middle education has been completed (<i>koleži</i>)	4 721	2 647	1 963	2 574	1 623	563
In programmes for VET Level II ⁽²⁾	18 198	15 595	4 121 ⁽⁵⁾	29 781	23 119	21 639
In programmes for Level 1 of voc. qual., starting after Year VI and VII of basic education (<i>osnóvno obrazovanie</i>) ⁽³⁾	536	441	373	368	366	519
In programmes for VET Level I, starting after Year 8, i.e. after completion of basic education (<i>osnóvno obrazovanie</i>) ⁽⁶⁾	102	181	215	262	200	246

Source: NSI *Obrazovanie* 2005 (CD), Table A.IV.16. and 2006 (print), p. 68.

VET Level = Level of vocational qualification according to the national system.

(1) Until 2002/2003 incl. *Tekhnikumi*.

(2) Until 2002/2003 incl. SPTU

(5) The number is smaller than in previous years because the term of training was increased by one year

(3) Incl. vocational technical schools after VI and VII grade up to 2002/2003.

(6) Incl. vocational technical schools after VIII grade up to 2002/2003.

Table 11: VET degree students in courses outside regular VET school

VET degree students in courses offered by CPO, vocational <i>gimnázii</i> , vocational schools and vocational colleges, in 2005 and 2006 (outside traditional school education) ¹				
	Enrolments		Degrees Attained	
	2005	2006	2005	2006
VET Level 1 – overall	4776	4984	5004	4873
in private institutions	3733	4297	3917	4215
in public institutions	1043	687	1087	658
VET Level 2 – overall	4006	4181	4316	4046
in private institutions	3604	3887	3970	3785
in public institutions	402	294	346	261
VET Level 3 overall	1897	2435	1504	1798
in private institutions	1112	1427	943	969
in public institutions	785	1008	561	829

¹ 2005 data from NSI obrazovanie 2006, p. 69; the 2006 data were yet unpublished by NSI in April 2007.

Institutions of Higher Education

This list comprises all 51 institutions of higher education which were registered by the Ministry of Education and Science by January 2007. Private institutions are marked with a "P".

"St Kliment Ohridski" University of Sofia <i>Sofijski universitet "Sv. Kliment Oksridski"</i>	www.uni-sofia.bg
"Paisij Hilendarski" University of Plovdiv <i>Plovdivski universitet "Paisij Xilendarski"</i>	www.uni-plovdiv.bg/pu
"St Kirill and Methodius" University of Veliko Tarnovo <i>Velikotărnovski universitet "Sv. sv. Kiril i Metodij"</i>	www.uni-vt.bg
"Neophit Rilski" South-West University - Blagoevgrad <i>Jugozapaden universitet "Neofit Rilski" - Blagoevgrad</i>	www.swu.bg
"K. Preslavski" University of Shoumen <i>Šumenski universitet "Episkop Konstantin Preslavski"</i>	www.shu-bg.net
"Angel Kanchev" University of Ruse <i>Rusenski universitet "Angel Kăncev"</i>	www.ru.acad.bg
Thracia University of Stara Zagora <i>Trakijski universitet - Stara Zagora</i>	www.uni-sz.bg
"Prof. Assen Zlatarov" University of Burgas <i>Universitet "Profesor d-r Asen Zlatarov" - Burgas</i>	www.btu.bg
University of National and World Economy - Sofia <i>Universitet za nacionalno i svetovno stopanstvo - Sofija</i>	www.unwe.acad.bg
University of Economics - Varna <i>Ikonomičeski universitet - Varna</i>	www.ue-varna.bg
"D. Tsenov" Academy of Economics <i>Stopanska akademija "Dimităr Cenov" - Svištov</i>	www.uni-svishtov.bg
University of Architecture, Civil Engineering and Geodesy <i>Universitet po arhitektura, stroitelstvo i geodezija- Sofija</i>	www.uacg.acad.bg
Technical University of Sofia <i>Texničeski universitet - Sofija</i>	www.tu-sofia.bg
Technical University of Varna <i>Texničeski universitet - Varna</i>	www.tu-varna.acad.bg
Technical University of Gabrovo <i>Texničeski universitet - Gabrovo</i>	www.tugab.bg
University of Chemical Technology and Metallurgy - Sofia <i>Ximikotexnologičen i metalurģičen universitet - Sofija</i>	www.uctm.edu

University of Mining and Geology - Sofia <i>Minno-geološki universitet "Sveti Ivan Rilski" - Sofija</i>		www.mgu.bg
University of Forestry - Sofia <i>Lesotexnički universitet - Sofija</i>		www.ltu.bg
University of Food Technologies - Plovdiv <i>Universitet po xranitelni tehnologij - Plovdiv</i>		www.vihvp.bg
Agricultural University - Plovdiv <i>Agraren universitet - Plovdiv</i>		www.au-plovdiv.bg
Medical University of Sofia <i>Medicinski universitet - Sofija</i>		www.mu-sofia.bg
"Prof. Paraskev Stoyanov" Medical University of Varna <i>Medicinski universitet "Prof.d-r Paraskev Stojanov" - Varna</i>		www.mu-varna.bg
Medical University of Plovdiv <i>Medicinski universitet - Plovdiv</i>		http://meduniversity-plovdiv.bg
Medical University of Pleven <i>Medicinski universitet - Pleven</i>		www.vmi-pl.bg
National Sports Academy "Vassil Levski" - Sofia <i>Nacionalna sportna akademija - Sofija</i>		www.nsa.bg
National Academy for Theatre & Film Arts "Krustyo Sarafov" <i>Nacionalna akademija za teatralno i filmovo izkustvo "Krašt'o Sarafov" - Sofija</i>		http://natfiz.bitex.com
National Academy of Arts - Sofia <i>Nacionalna xudožestvena akademija - Sofija</i>		www.nha-bg.org
"Prof. Pancho Vladigerov" State Academy of Music – Sofia <i>Džrjavna muzikalna akademija "Profesor Pančo Vladigerov"</i>		http://dma.data.bg
Academy of Music Dance and Arts - Plovdiv <i>Akademija za muzikalno, tancovo i izobrazitelno izkustvo - Plovdiv</i>		www.amti.hit.bg
New Bulgarian University - Sofia <i>Nov bālgarski universitet - Sofija</i>	P	www.nbu.bg
Bourgas Free University <i>Burgaski svoboden universitet</i>	P	www.bfu.bg
"Chernorizec Hrabar" Varna Free University <i>Varnenski svoboden universitet "Černorizec Xrabār"</i>	P	www.vfu.bg
American University in Bulgaria - Blagoevgrad <i>Amerikanski universitet v Bālgarija - Blagoevgrad</i>	P	www.aubg.bg
"Vassil Levski" National Military University - Veliko Tarnovo <i>Nacionalen voenen universitet "Vasil Levski" - Veliko Tārnovo</i>		

"Nikola Vapcarov" Naval Academy <i>Visše voennomorsko učilište "Nikola Jonkov Vapcarov" - Varna</i>		www.naval-acad.bg
"Luben Karavelov" Higher School of Civil Engineering <i>Visše stroitelno učilište "Ljuben Karavelov" - Sofija</i>		www.vsu-bg
"Todor Kableskov" Higher School of Transport <i>Visše transportno učilište "Todor Kableskov" - Sofija</i>		www.vtu-acad.bg
Police Academy - Sofia <i>Akademija na MVR - Sofija</i>		www.academy.mvr.bg
"G. S. Rakovski" Defence and Staff College <i>Voenna akademija "Georgi Stojkov Rakovski"- Sofija</i>		http://rakovski-defcol.mod.bg
State Institute Of Library Studies And Information Technologies <i>Specializirano visše učilište po bibliotekoznanie i informacionni tehnologii - Sofija</i>		www.svubit.org
Higher College of Telecommunications and Posts <i>Kolež po telekomunikacii i pošti - Sofija</i>		www.hctp.acad.bg
College of Management Trade and Marketing - Sofia <i>Kolež po menadžmănt, tărgovija i marketing - Sofija</i>	P	www.mtmcollege.org
International College Albena <i>Meždunaroden kolež - Albena</i>	P	http://internationaledu.org
Agricultural College Plovdiv <i>Zemedelski kolež - Plovdiv</i>	P	www.agricollage.com
European College of Economics and Management, Plovdiv <i>Evropejski kolež po ikonomika i upravljenje - Plovdiv</i>	P	www.ecem.org
"Luben Groyce" College of Theatre - Sofia <i>Teatralen kolež "Ljuben Grojs" - Sofija</i>	P	
Higher School of Insurance and Finance - Sofia <i>Visše učilište po zastraxovane i finansi - Sofija</i>	P	http://vuzf.bg
"Telematika" College, Stara Zagora <i>Kolež "Telematika" - Stara Zagora</i>	P	www.telematika-college.com
International Business School, Botevgrad <i>Meždunarodno visše biznes učilište - Botevgrad</i>	P	www.ibsedu.com
College of Tourism, Blagoevgrad <i>Kolež po turizăm - Blagoevgrad</i>	P	www.cotur.org
College of Economy and Administration, Plovdiv <i>Kolež po ikonomika i administracija - Plovdiv</i>	P	www.cea.hit.bg

Brief Definitions of Terms Used to Describe Learning

Formal Learning: „Learning typically provided by an education or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner's perspective.“ (2001, p. 33)

Non-formal learning: “takes place alongside the mainstream systems of education and training and does not typically lead to formalised certificates. Non-formal learning may be provided in the workplace and through the activities of civil society organisations and groups (such as in youth organisations, trades unions and political parties). It can also be provided through organisations or services that have been set up to complement formal systems (such as arts, music and sports classes or private tutoring to prepare for examinations).”² „It is, however, structured (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner's perspective.“³

Informal learning: „ „Learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional...“⁴

Adult Learning: Definitions of adult learning vary. In one of its recent communications, the European Commission has used the following definition: “all forms of learning undertaken by adults after having left initial education and training, however far this process may have gone (e.g., including tertiary education)”.⁵

Certification: „The process of issuing certificates or diplomas, which formally recognise the achievements of an individual, following an assessment procedure.“⁶

² EC: A Memorandum..., p. 9. (See *Further Reading* for full titles.)

³ EC: Making a European Area..., p. 35.

⁴ EC: Making a European Area..., p. 33.

⁵ EC: Adult learning: It is never..., p. 2.

⁶ EC: Making a European Area... , p. 35.

Lifelong Learning (a Definition)

According to standard concepts of European education policy, Lifelong learning (LLL) encompasses...

“[...] Learning for personal, civic and social purposes as well as for employment-related purposes. It takes place in a variety of environments in and outside the formal education and training systems. Lifelong learning implies raising investment in people and knowledge; promoting the acquisition of basic skills, including digital literacy; and broadening opportunities for innovative, more flexible forms of learning. The aim is to provide people of all ages with equal and open access to high-quality learning opportunities, and to a variety of learning experiences, throughout Europe. Education systems have a key role to play in making this vision a reality.”⁷

As can be seen in this definition, there are two different meanings of the notion “Lifelong learning” intermixed. “Lifelong learning” is used, first, as a **technical term** for “all learning activities of (especially) adults during their lifetime”. The other meaning is a **political programme**. According to European education policy, the aim is to provide people of all ages with equal and open access to high-quality learning opportunities, and to a variety of learning experiences, throughout Europe. The policy is to make Member States transform formal education and training systems in order to break down barriers between different forms of learning.

At the Lisbon European Council in March 2000, government leaders set the EU a 10-year mission to become the “most competitive and dynamic knowledge-based economy in the world, capable of sustained economic growth with more and better jobs and greater social cohesion”. Lifelong learning is a core element of this strategy, central not only to competitiveness and employability but also to social inclusion, active citizenship and personal development.

Following the adoption by the Commission on 21 November 2001 of the *Communication on Making a European Area of Lifelong Learning a Reality*, lifelong learn-

⁷ This definition was published as an introduction to the European Commission's policy area “Education and Training” at http://ec.europa.eu/education/policies/III/III_en.html (accessed on 19 April 2007). There are lots of similar definitions around.

ing has become the guiding principle for the development of education and training policy. The Communication sets out concrete proposals that aim to make lifelong learning a reality for all.

In June 2002, the Education Council adopted a *Resolution on lifelong learning* supporting the implementation of the Commission Communication.

A key priority of LLL policies in Europe is, at the moment, the *European Qualifications Framework* (EQF), which the Commission formally published as a Staff Working Document on 8 July 2005. The objective of the planned EQF is to facilitate the transfer and recognition of qualifications held by individual citizens, by linking qualifications systems at the national and sectoral levels and enabling them to relate to each other. The EQF shall therefore act as a translation device and will be one of the principal European mechanisms intended to facilitate citizen mobility for work and study, alongside other programmes such as Erasmus, the European Credit Transfer System and Europass.

A Short Introduction into ISCED

The International Standard Classification of Education (ISCED) is designed to serve as an instrument for presenting comparable indicators and statistics of education both within individual countries and internationally. It provides a set of standard definitions which help classify all levels of education from early childhood to professional life. In different countries, with their specific educational systems, levels such as “basic education”, “upper secondary”, “vocational post-secondary” and university degrees differ considerably both in contents and complexity. ISCED reduces this complexity to a standard classification. ISCED covers all organized learning opportunities for children, youth and adults including those with special needs education, irrespective of the institution providing them or the form in which they are delivered. ISCED has been designed for education policy analysis, in whatever structure of the national education system. The most recent adjustment has been published in 1997. Hence, classifications are cited “ISCED 97”. →

In what follows, the levels of education are presented as defined by ISCED 97. This is a summary, meant as a first introduction into the system. Descriptions in the ISCED 97 document itself are considerably more detailed.⁸

Level 0 – Pre-primary education

Programmes at level 0, (pre-primary) are defined as the initial stage of organized instruction. They are designed primarily to introduce very young children to a school-type environment, i. e. to provide a bridge between the home and a school-based atmosphere. Upon completion of these programmes, children continue their education at Level 1 (primary education). Such programmes are designed for children aged at least 3 years. The upper age limit depends in each case on the typical age for entry into primary education. Where appropriate, the requirement of pedagogical qualifications for the teaching staff can be a good proxy criterion for an educational programme, particularly where it distinguishes pre-primary education from child-care.

Level 0 includes organized instruction for children with special needs. This may be also provided in hospitals or in special schools or training centres. In this case no upper age limit is specified. – Adult education is genuinely not part of Level 0.

Level 1 – Primary education

Programmes at level 1 are normally designed to give students a sound basic education in reading, writing and mathematics along with an elementary understanding of other subjects such as history, geography, natural and social science, art and music. The core at this level consists of education provided for children, the customary age of entrance being between five and seven years. Level 1 covers in principle six years of full-time schooling. The programmes are organized in units or projects rather than by subjects. This is a principal characteristic differentiating programmes in most countries from those at Level 2. In countries where primary education is part of ‘basic education’, only the first stage should be included in level 1. If ‘basic education’ is not officially divided into stages, only the first six years should be classified as Level 1.

⁸ The ISCED document is available at www.unesco.org.

This level category also includes programmes suited to children with special needs education. – Literacy programmes within or outside the school system which are similar in content to programmes in primary education for those considered too old to enter elementary schools are also included at this level because they require no previous formal education.

Level 2 – Lower Secondary Education

Education at Level 2 (lower secondary education) is typically designed to complete the provision of basic education which began at ISCED level 1. In most countries, the aim is to lay the foundation for lifelong learning and human development on which countries may expand, systematically, further educational opportunities. The programmes at this level are usually on a more subject-oriented pattern using more specialized teachers and more often several teachers conducting classes in their field of specialization. The full implementation of basic skills occurs at this level. The end of this level often coincides with the end of compulsory education. In countries where primary education is part of ‘basic education’, the second stage of ‘basic education’ should be included in level 2. If ‘basic education’ is not officially divided into stages, the years after the sixth should be classified as Level 2.

ISCED 2 programmes are subclassified by

- ISCED 2A: programmes designed for direct access to level 3 in a sequence which would ultimately lead to tertiary education, i.e. entrance to ISCED 3A or 3B
- ISCED 2B: programmes designed for direct access to level 3C
- ISCED 2C: programmes primarily designed for direct access to the labour market at the end of this level

Another division can be made into three orientations a) general b) pre-vocational/ pre-technical and c) vocational/ technical.

Level 2 includes special needs education programmes and all adult education which are similar in content to the education given at this level, e.g. the education which gives to adults the basic skills necessary for further learning.

Level 3 – Upper Secondary Education

Level 3 (Upper Secondary Education) typically begins at the end of full-time compulsory education for those countries that have a system of compulsory education. More specialization may be observed at this level than at Level 2, and often teachers need to be more qualified or specialized than for Level 2. The entrance age to this level is typically 15 or 16 years. The educational programmes included here typically require the completion of some 9 years of full-time education (since the beginning of Level 1) for admission, or a combination of education and vocational or technical experience. An entrance requirement usually is completion of Level 2 or demonstrable ability to handle programmes at this level.

A subgrouping is possible according to what educational programme can be entered afterwards.

- ISCED 3A provide direct access to ISCED 5A.
- ISCED 3B programmes provide direct access to ISCED 5B;
- ISCED 3C lead directly to the labour market, ISCED 4 programmes or other ISCED 3 programmes, but do not lead directly to any ISCED 5 programmes.

This level includes also special needs education programmes and adult education.

Level 4 – Post-Secondary non Tertiary Education

ISCED 4 programmes can, considering their content, not be regarded as tertiary programmes. Thus, they are called “Post-secondary non tertiary programmes”. They are often not significantly more advanced than programmes at ISCED 3, but they serve to broaden the knowledge of participants who have already completed a programme at level 3. Typical examples are programmes designed to prepare students for studies at level 5 who, although having completed ISCED level 3, did not follow a curriculum which would allow entry to level 5. Accordingly, level 4 can be subdivided into:

- ISCED 4A programmes that prepare for entry to ISCED 5; and
- ISCED 4B programmes not giving access to level 5, primarily designed for direct labour market entry.

Level 4 includes adult education too. For example, technical courses given during an individual's professional life on specific subjects as computer software could be included in this level.

Level 5 – First stage of tertiary education (not leading directly to an advanced research qualification)

Level 5 consists of tertiary programmes having an educational content more advanced than those offered at levels 3 and 4. Most university programmes are ISCED Level 5. Entry to these programmes normally requires the successful completion of ISCED Level 3A or 3B or a similar qualification at ISCED level 4A.

Level 5 programmes can be divided in

- ISCED 5A: programmes which are theoretically based and research preparatory (history, philosophy, mathematics, etc.) or give access to professions that are regarded as requiring high skills (e. g. medicine, dentistry, architecture, etc.).
- ISCED 5B: programmes which are practical, technical, or occupationally specific.

ISCED level 5A programmes are largely theoretically based and are intended to provide sufficient qualifications for gaining entry into advanced research programmes and profession with high skills requirements. Qualifications in category 5B are typically shorter than those in 5A and focus on occupationally specific skills geared for entry into the labour market, although some theoretical foundations may be covered in the respective programme.

Level 6 – Second stage of tertiary education

Level 6 (Second stage of tertiary education) is reserved for tertiary programmes which lead to the award of an advanced research qualification. The programmes are therefore devoted to advanced study and original research and are not based on course-work only. It typically requires the submission of a thesis or dissertation of publishable quality which is the product of original research and represents a significant contribution to knowledge.

Priorities of the Adult Training Strategy 2007-2013 (Draft Version 2006)

In this section we present the list of activities that have been suggested by the authors of the “Adult Training Strategy 2007-2013” for Bulgaria. For an introduction into the strategy see p. 157.

Priority 1: Improving the conditions for access to adult education and training and bringing training closer to adult learners

No	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Drawing up a systematic analysis of the state of adult education and training in the country (by regions) for the purpose of assessing the conditions for access to education and training as well as to vocational guidance and counselling.	A prepared analytical report containing conclusions and proposals with regard to adult training in the country.	A Sociological Agency contracted by MLSP, MES and NAVET	State Budget, EU Funds, other sources	2007
2.	Drafting and adopting a Bill for amending the legislation regulating adult training.	A developed and adopted Bill for regulating adult training (amendments to the existing legislation or a new law)	Parliamentary committees on labour and social policy as well as on education and science, MLSP, MES, civil society institutions	No funding is required	2007-2008
3.	Undertaking actions for improving the conditions for equal opportunities and actual access to education for people from disadvantaged groups.	Improved actual access to education and training services for people from disadvantaged groups	MLSP, MES, civil society institutions, regional and local government bodies	State Budget, municipal budgets, EU Funds and other sources	2007-2013
4.	Establishing a unified information system for the services provided in the field of adult education and training that includes a mechanism for exchange of information	An established system at the national level containing data about the training institutions and the training they provide.	NAVET EA	In the framework of a national and/or an international project	2007-2008

<p>between the state institutions involved in the field of VET, employers and training institutions</p>				
<p>5. Implementing a system for motivating adults and employers to participate in activities in the field of education and training.</p>	<p>Applied differentiated approaches to different target groups on the basis of equal opportunities. Permanent motivation training for employers.</p>	<p>MLSP, MES, social partners</p>	<p>State Budget, EU Funds, other sources</p>	<p>2007-2008</p>
<p>6. Encouraging the process of providing educational and training services in the public and private sectors.</p>	<p>Ensured equality and enhanced mobility among training institutions.</p>	<p>MLSP, MES, NAVET, EA, training institutions</p>	<p>Public-private partnership</p>	<p>2007-2013</p>
<p>7. Popularizing adult education and training through media campaigns for generating interest and activating public dialogue.</p>	<p>1. A developed program and ensured financial stimuli for carrying out a media policy 2. Expanding the activities of the institutions for promoting adult training 3. Joint efforts of the state and local administration, social partners and civil society 4. Activities for informing employers about issues related to adult training</p>	<p>All institutions at the national and the regional level</p>	<p>State Budget, public-private partnership</p>	<p>2007-2013</p>
<p>8. Bringing learning closer to adults a) An analysis of the current state and developing measures for effective use of the existing opportunities and creating new opportunities for participation of adults in non-attendance forms (distance learning and e-learning) b) Creating opportunities for increasing the territorial mobility of the provided services and decentralizing the system of training providers.</p>	<p>a) Expanded use of non-attendance forms of training b1) An established system of adult training providers at the national level b2) Involvement of non-traditional knowledge providers – bookstores, libraries, cinemas, clubs, museums, etc.</p>	<p>Training providers</p>	<p>Existing sources</p>	<p>2007-2013</p>

9.	Developing a plan and establishing a modern system for career development, vocational information, counselling and guidance at the national level.	An established system for career information, counselling and guidance at the national level as a result of the cooperation among social partners. Functioning centres for career information, counselling and guidance.	MLSP, MES, NAVET, social partners	State budget, EU funds, etc.	2008-2013
10.	Developing and implementing national and regional plans for effective realization of the conditions for the eradication of illiteracy and continuation of adult education at the institutions of the national education system.	Realized conditions for opening the schools in Bulgaria for literacy courses and adult training for acquiring a level of education or for completing a grade from the primary or secondary stage of education.	MES, MLSP	State Budget	2007-2013

Priority 2: Improving the response of adult training to the labour market and improving the flexibility of training provision

No	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Accelerating the process of interaction between employers and training institutions for the purpose of ensuring adequate training (syllabi and curricula for adults) in the introduction of new technologies in enterprises and/or pre-emptive staff training.	Created conditions for timely acquisition of upgraded qualification through updated training documentation for adult vocational training in the production, service and administration sectors.	MLSP, MES, social partners, training organizations	Budgets of the institutions involved	2007-2013
2.	Developing and implementing a system of adult training needs analysis.	Developed long-, mid-, and short-term analyses, prognoses and plans for adult training needs.	MLSP, MES, scientific-research organizations and units	State Budget, EU funds, public-private partnership	2007-2013
3.	Providing conditions for continuous upgrading of the qualification of adult trainers in accordance with the dynamically changing labour market needs.	Acquired updated knowledge and skills for using new technologies and preparedness of trainers to apply these skills in practice.	MES, MLSP, NAVET, institutions for preparation of teachers	State Budget, EU funds and public-private partnership	continuing

4.	Specifying the interaction, coordination and communication between the bodies (counties) of the social partners for training and qualification of adults and the training institutions with the aim of identifying the qualification needs in the labour market.	Improved coordination and communication between the existing bodies (if necessary, establishing new bodies) under the guidance and with the participation of social partners in the field of adult vocational training. Information provision. Better correspondence between the requests for training and the actual qualification needs. Created conditions for providing adult training using updated training documentation.	All involved organizations	Budgets of all involved organizations	2007-2010
5.	Provision of favourable regulations for constant access to upgraded and practically-oriented knowledge and skills.	Improving the conditions for practical in-company training for adults.	MES, MLSP, NAVET, social partners	Budgets of involved institutions	2007-2008
6.	Improving the incentives for employers to invest in staff training for the purpose of enhancing competitiveness and achieving better economic results.	Increased investments in staff training. Carried out bilateral dialogue with regard to staff development plans (career plans).	Nationally representative organizations of employers and workers and employees	Funds of the organizations, European Social Fund.	continuing
7.	Establishing and approving a credit-transfer system in adult training.	An established credit-transfer system in adult training. An improved opportunity for individualization of training in accordance with the specific needs of trainees and the labour market.	MES, MLSP, NAVET, social partners, training institutions, NGO	EU funds, public-private funding	2011

Priority 3: Improving the opportunities for personal development through training in key competencies

No	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Providing an analysis of the situation and defining the needs in the field of key competencies according to age characteristics	An analysis – conducted and delivered to the involved institutions	MES, MLSP, NAVET, research institutions <i>(including vocational)</i>	Budgets of the institutions involved, EU funds	2007-2008

				2009
	2. Developing national education requirements (standards) for key competencies in compliance with the European standards	<p>a) Developed state educational requirements for the general educational minimum for the first phase of primary education (basic education) that provide opportunity for validation of knowledge and skills for acquiring a level of education</p> <p>b) On the basis of the European Qualifications Framework or other international experience developed requirements (standards) for key competencies which do not lead to acquiring a level of education</p>	institutions) MES, MLSP, NAVET, scientific-research institutions, social partners	Budgets of the organizations, EU funds
	3. Regulating and implementing the standards through a specially developed framework based on the European experience "National Framework for Key Competencies for Lifelong Learning" as part of the National Qualifications Framework that can be used for all qualifications, phases and levels in the educational system as well as in the neighbouring fields of employment, social policy, youth and sports	A developed "National Framework for Key Competencies for Lifelong Learning"	MES, scientific-research institutions, social partners	2009 State Budget, EU funds
	4. Regulating in terms of legislation and institutions the services for education (eradication of illiteracy) and training in the field of key competencies	Implemented licensing or registration regime for educational and training services in the field of key competencies	Independent public body with the participation of ministries, agencies, social partners, professional associations, international institutions	2009 EU funds, public-private partnership
	5. Promoting the opportunities for personal development through adult training	Positive public attitude towards adult training as an opportunity for personal development	Media, NGO, civil society organizations	continuing public-private partnership

Priority 4: Improving adult training methodology.

№	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Researching and analyzing the results from the implementation of the adult training methodology; developing a project for its further development as well as didactic materials for teachers	An improved adult training methodology	MES, MLSP, higher schools, scientific-research institutions	State Budget, projects	2008
2.	Developing approaches, methods and tools for the systematic training of trainers of adults (multipliers).	Established system and developed plans for training trainers of adults. Established resource centres for qualifying trainers of adults. Established Register of certified trainers.	MES, MLSP, NAVET, higher schools, scientific-research institutions, NGO, training institutions	State budget, projects, public-private partnership	2009
3.	Disseminating the methodology among adult training institutions.	Delivered information seminars, presentations and discussions with the management bodies of interested institutions at different levels.	Training institutions	Projects	continuing
4.	Encouraging adult training institutions to provide and use contemporary training methods.	Improved facilities in adult training institutions and use of contemporary training methods	NAVET and the institution that requests the training	Public-private funding	continuing
5.	Updating and improving the existing module-based training in the field of adult education.	Updated training content by modules. Expanding the scope of application of module-based training in the field of adult training.	Training institutions, scientific-research institutions	Public-private funding	continuing
6.	Pilot testing of the distance approach and forms of training, including e-learning	A report on the results from the adoption of the new forms and formulation of conclusions and proposals for expanding the scope of their application. Promoting those forms of training.	Training institutions, scientific-research institutions, higher schools, enterprises	Public-private funding, EU funds	2011

7. Multiplication of the methodology of the training firms at the training enterprises for adult training	Established training firms for adults and carried out training for the trainers at these firms	MES, training institutions	State budget, budgets of the training institutions, EU funds	2012
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Priority 5: Developing the recognition / validation of knowledge and skills obtained as a result of non-formal or informal learning, evaluation, certification, documentation

№	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Initiating social dialogue for reaching an agreement as far as the spheres of application of competence validation are concerned.	Agreed mechanisms for applying competence validation.	MLSP, EA, MES, NAVET, social partners	2008	
2.	Developing a system of clear, adequate and simplified methods and tools for evaluation of professional and key competencies	Developed and distributed methods and tools for evaluation of professional and key competences.	MES, MLSP, NAVET, social partners, recently established institutions and units	2009	
3.	Conduct a study on the respective experiences of those European countries in which systems for the recognition of non-formal and informal learning have been developed.	Synthetic report on the European experience	MLSP, EA, MES, NAVET, social partners	2009	
4.	Developing mechanisms for validating professional and key competencies acquired through formal, non-formal and informal learning on the basis of the National Qualifications Framework that corresponds to the European Qualifications Framework	Developed system for certification of professional and key competencies: - system for registration of institutions providing adult training in the field of key competencies and personal potential development - a developed mechanism for drafting and maintaining a National Catalogue of documents for certifying key competencies	MES, MLSP, NAVET, social partners	2010	

5.	Carrying out an information campaign for explicating the opportunities and advantages of validation of competencies	Achieved high level of public and individual awareness and motivation for the opportunities and advantages of competence validation	MES, MLSP, NAVET, social partners, media, training institutions, recently established certifying institutions, NGO	EU funds, public-private partnership	continuing
6.	Improving the legislation and the practices for validating the results of non-formal and informal learning for obtaining a level of education or vocational qualification, and/or acquired on the basis of prior experience, including from in-company training	Improved legislation, regulating the opportunities for acquiring a level of education and a level of vocational qualification in the system of adult education and training. An established mechanism for motivating interested institutions and individuals for validating the results of non-formal learning in the field of vocational training. An elaborated model for financing validation processes.	MES, MLSP, Social partners	State budget	2008

Priority 6: Improving the quality of adult education and training

Nº	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Developing a "National Framework for Institutional Capacity"	Set benchmarks determining the requirements for the training premises (organizational and management structure, study equipment, staff) of training providers as sufficient conditions for ensuring high quality of the provided adult education and training	NAVET, MLSP, MES, social partners	State budget, EU funds	2010
	2. Implementing a program for improving the quality of management of adult training institutions	An effective program and improved management skills of the administrative staff of adult training providers.	MES, MLSP, NAVET, schools of higher education, scientific-research institutions, NGO, training institutions	State budget, projects, public-private partnership	2009

3.	Implementing measures for improving the quality of the preparation of trainers of adults	Implemented measures for improving the quality of preparation of trainers of adults. A developed system for the certification of the knowledge and skills of trainers of adults.	MES, MLSP, NAVET, schools of higher education, scientific-research institutions, NGO, training institutions	State budget, projects, public-private partnership	2010
4.	Implementing internal Quality Management systems in the institutions providing adult education and training	Improved quality of services provided by the training institutions as a result of the implemented internal quality management systems	Training institutions	Budgets of the training institutions, EU funds	continuing
5.	Encouraging the process of external quality assurance in adult training institutions through units and consultancy companies for independent external evaluation of the provided services with the participation of highly qualified experts and social partners.	Improved quality of the services provided by training institutions as a result of the opportunity they have to get consultancy services both in relation to the process of delivering training and in relation to the quality of the provided product.	MLSP, NAVET, training, consultancy and other interested institutions	State budget, public-private funding, EU funds	continuing
6.	Creating effective mechanisms for social dialogue with a view to ensuring high quality of adult training: improving the tripartite system in adult education and training and its application to all levels of training provision.	Ensured correspondence between the quality of training output, the needs of the labour market and EU workforce mobility.	MLSP, MES, NAVET, social partners	State budget, public-private funding, EU funds	continuing

Priority 7: Developing research and development (R&D) and applied activities in the field of adult training

No	Activity	Expected Outputs	Institutions	Funding Sources	Deadline
1.	Developing the andragogic basis for literacy courses and improving the literacy of adults.	Improved training results. Improved organization of the training processes.	MES, schools of higher education, scientific-research institutions	State budget, EU funds	2008

2.	Developing instructions and a model for the application of the andragogic approach to motivation as well as providing information, vocational guidance and counselling for adults.	Enhanced motivation of learners to learning and employment. Scientifically ensured system for providing information, vocational guidance and counselling to adults.	MES, MLSP, EA Schools of higher education Scientific research institutions	State budget, EU funds	2009
3.	Creating a network of specialized scientific research and development units (resource centres) in the system of scientific–research and development activities at the national, local and branch level.	Ensured access to the latest achievements of andragogy.	MES, MLSP, scientific research and branch institutions Local authority bodies	State budget EU Funds Public-private funding	2010
4.	Developing the scientific basis for creating curricula and syllabi, textbooks and examination materials for adult training.	Developed curricula and syllabi that correspond to the latest achievements in andragogy as well as to the European standards in the field of adult training.	MES, NAVET, schools of higher education, scientific research institutions	State budget, EU funds, public-private funding	continuing
5.	Developing projects for implementing in practice the modular-based approach as well as the distance learning approach.	Improvement and development of the application of the two approaches.	MES, NAVET, schools of higher education, scientific research institutions	State budget EU Funds Public-private funding	continuing
6.	Creating effective mechanisms for improving the qualification of scientific research staff in the field of applied andragogy.	Concentration in the system of staff trained in applied andragogy.	MES, NAVET, schools of higher education, scientific research institutions	State budget EU funds Public-private funding	continuing

A List of Legislation, Regulations and Government Plans

Below we cite laws, administrative regulations, government programmes etc. concerning adult education in Bulgaria. Some of them are mentioned or discussed in more detail in the book, especially in Chapters 3 and 4.

The list originally was printed in a government report to the European Commission on Education in Bulgaria issued in 2006.¹ For the sake of consistency we have retained its original numbering, although some irrelevant titles are omitted. As far as are concerned Acts (*zakóni*), we have actualised outdated citations (date of publication in the Official Gazette, *Džžaven vestnik*, DV). For example the Vocational Education and Training Act (ZPOO) was cited by its 2003 version, and we have added the most recent amendment from August 2006 when this book went to print. Obviously the Government didn't care that much for actuality in its 2006 report to the European Commission. Thus, there might be some orders (*narédba or právilnik* type) and other acts of secondary legislation which are not cited by their most recent version. We did not check whether citations of government programmes, strategies, reform programmes etc. are up to date, but probably they are, since they do not undergo amendments.

Bulgarian legislation normally can be found on the websites of the respective Ministries. The same is true for strategies, action plans and other papers.

1. *Zakon na narodnata prosveta (ZNP)* [Education Act], first published in DV Vol. 86, 18.10.1991, most recent amendments in Vol. 41 from 19.05.2006.
2. *Pravilnik za prilagane na ZNP* [Rules for Implementation of ZNP], published in DV Vol. 9, 11.11.2003.
3. *Zakon za profesionalното obrazovanie i obučenje (ZPOO)* [Vocational Education and Training Act], published in DV Vol. 68, 30.07.1999 g., most recent amendments Vol. 63, 4.8.2006.
4. *Zakon za stepenta na obrazovanie, obštobrazovatel'nija minimum i učebnija plan (ZSOOMUP)* [Levels of Education, Minimum General Education and

¹ *Obrazovanie i obučenje 2010. Prinos na R. Bážarija kým sávmeštnija doklad na Evropejskata Komisija i Sáveta 2006 g.*

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- School Curriculum Act], *published in DV, Vol. 67, 27.07.1999, most recent amendments and additions Vol. 41, 19.05.2006.*
5. *Nacionalna strategija za prodĺlžavaštoto profesionalno obuĉenie za perioda 2005-2010 g.* [National Strategy for Continuing Vocational Education in the period 2005-2010], adopted by Cabinet in 2004.
 6. *Nacionalna strategija za vevēzdane na informacionnite i komunikacionnite texnologii v balgarskite uĉilišta* [National Strategy for the Introduction of Information and Communication Technologies in Bulgarian schools], adopted by decision of Parliament, DV., Vol. 21, 2005.
 7. *Strategija za borba s bednostta i socialnata izolacija* [Strategy to Combat Poverty and Social Isolation], adopted by decision of Cabinet in 2003.
 8. *Nacionalen plan za borba s bednostta i socialnata integracija prez 2005-2006 g.* [National Plan for Combating Poverty and for Social Integration], adopted by Cabinet, 10.3.2005.
 9. *Proekt na operativna programa za "Razvitie na ĉoveštite resursi"* [Project for an Operational Programme for "Human Resource Development"], part of the *Nacionalnija plan za ikonomiĉesko razvitie za perioda 2007-2013* [National Economic Development Plan for the Period 2007-2013].
 10. Report of the World Bank on "Secondary Education in the 21st Cent. New Directions, Challenges and Priorities", presented at the seminar "*Reforma v srednoto obrazovanie*" [Reform of Secondary Education], organized by the Bulgarian Ministry of Education and Science and the World Bank in January 2005.
 11. *Zakon za visēeto obrazovanie* [Higher Education Act], *first published in DV Vol. 112, 27.12.1995, most recent amendments Vol. 62, 1.8.2006.*
 12. *Naredba za drēavnite iziskvanija km osnovnite dokumenti, izdavani ot visēite uĉilišta i Evropejsko diplomno priloēenie* [Regulation on National Requirements for Basic Documents Issued by Higher Education Institutions and the European Diploma Supplement], *published in DV Vol. 75, 12.08.2004.*
 13. *Naredba za prilagane na sistema za natrupvane i transfer na krediti vv visēite uĉilišta* [Regulation on Implementation of a Credit Point System in Higher Education], *published in DV, Vol. 89, 30.09.2004.*

14. *Naredba za dържавните изисквания за организирани на дистанционна форма на обучение във висшето училище* [Regulation on National Requirements for the Organization of Distance Learning in Higher Education], published in DV Vol. 99, 02.11.2004.
15. *Zakon za dържавния бюджет на Р. България за 2005 г.* [National Budget Act of the Republic of Bulgaria for 2005], published in DV Vol. 115, 30.12.2004.
17. *Zakon za nasърчаване на заетостта* [Employment Promotion Act], published in DV Vol. 112, 29.12.2001.
18. *Nacionalen plan za dejstvie po zаетостта* [National Employment Plan], adopted by Cabinet on 14.02. 2005 g.
19. *Zakon za zakrila pri bezработica i nasърчаване на заетостта* [Unemployment Benefit and Employment Promotion Act], published in DV Vol. 120, 16.12.1997, most recent amendments in DV, Vol. 48, 13.6.2006.
20. *Nacionalna strategija za prodълžavaštoto profesionalno обучение за 2005-2010 г.*, [National Strategy for continuing vocational education for 2005-2010], adopted by decision No. 38.1. of Cabinet on 14.10.2004.
22. *Nacionalen доклад на Р. България по Memoranduma za учене през целия живот* [National Report of the Republic of Bulgaria on the Lifelong Learning Memorandum], Sofia 2003.
23. *Ramkovi изисквания за разработване на държавни образователни изисквания по професии* [Outline Requirements for National Occupational Training Requirements], NAPOO.
24. *Analizi za състоянието на обучението, проведено от професионалните гимназии* [Analysis of the State of Education Provided by Vocational Gimnázii], Ministry of Education and Science, 2003.
25. *Prodълžavaštoto profesionalno обучение в контекста на ученето през целия живот в България* [Continuing Vocational Education in the Context of Lifelong Learning in Bulgaria]. Report of the partnership visit of the European Training Foundation, 2004.
26. *Naredba № 5, 14.05.2002.za normите за задължителна преподавателска работа и нормативите за численост на персонала в системата на народната проsveta*

- [Regulation No. 5 from 14th May 2002 on Obligatory Standards of Teaching Work and Staff Numbers in the Formal Education System], published in DV Vol. 83, 24.9.2004.
27. Prof. D. Dimitrov (ed.): *Visše obrazovanie 2001, Vol. II.*, published by the Ministry of Education and Science, Sofija 2001.
28. *Klasifikator na oblastite na visše obrazovanie i profesionalnite napravlenija* [Classification of Fields of Higher Education and Occupational Sectors], published in DV Vol. 64, 02.07.2002.
29. *Naredba za dържавните iziskvanija za pridobivane na visše obrazovanie na obrazovatelno-kvalifikacionnite stepeni "bakalavър", "magistър" i "specialist"*, [Regulation on National Requirements for Admission to Higher Education at "Bachelor", "Master" and "Specialist" Levels] published in DV Vol. 76, 6.08.2002.
32. *Ramkovi programi A za načalno profesionalno obučenje s pridobivane na първа stepen na profesionalna kvalifikacija.* [Outline Curricula A for Initial Vocational Training Leading to Level 1 Vocational Qualifications]
33. *Ramkovi programi D za obučenje po čast ot profesija.* [Outline Curricula D for Training in Specific Occupational Tasks]
34. *Ramkovi iziskvanija za razrobotvane na DOI za pridobivane na kvalifikacija po profesii.*[Outline Requirements for Drawing up DOI for the Acquisition of Vocational Qualifications]
35. *Pravila za razrobotvane na DOI.* [Rules for Drawing up DOI]
36. *Metodičeski ukazanija za razrobotvane na DOI.* [Methodology for Drawing up DOI.]

Further Reading

The book draws on current materials from Bulgarian authorities and institutions, the Bulgarian National Statistics Institute, previously unpublished archive research and numerous interviews with experts from agencies and educational institutions associated with adult education. The following bibliography is intended to provide additional resources for the interested reader from Western countries. Works in Bulgarian are therefore not generally listed, or only when they seemed to be very important.

History

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