Chapter 6

VOCATIONAL EDUCATION AND TRAINING

Vocational education and training (VET)

Bulgaria faces two main challenges with regard to VET: (1) the implementation of the VET Law adopted in July 1999, which complements the Public Education Act; and (2) "harmonisation" of its VET system and its national needs with those of the European Union. The key issues are:

- decentralisation of the VET system;
- optimisation of the VET school network;
- co-operation between VET and labour market;
- efficiency and quality of VET;
- sustaining VET reform.

The priorities are to update VET standards, and to further develop assessment and certification. With regard to employment and social affairs, the objectives set by the Bulgarian government for human resource development and labour market policy correspond well with the priorities identified by the European Commission.

Socio-economic context relevant to VET/labour market assessment

Generally, Bulgaria's economy is characterised by fluctuating economic growth with increase in GDP, low inflation rate, decrease in manufacturing output, negative foreign trade balance, and increasing amount in foreign investment. The investment in education was 4.3% of GDP in 2000.[1]

1. The source for all statistics in this section is the National Statistical Institute, General and Vocational Education in school year 1999/2000.

The development of the labour market is characterised by the restructuring of industry, privatisation, liquidation of companies and new business start ups. The most recent expansion of the private sector indicates a promising dynamic, but does not compensate for the increase of unemployment in the public sector. While in 2000 the percentage of those employed in the private sector reached 70%, employment in the public sector dropped from 77.4% in 1993 to 46.6% in 2000. Small and medium-size enterprises (SMEs) have a substantial employment share – 51.5% in 2000 – but are not yet sufficiently efficient in the current economic conditions. While the service, construction, tourism and information technology sectors are emerging, chemical industry, timber processing, textile production are in decline.

Demographic changes increasingly affect the labour market and the VET system. Between 1999 and 2010, the number of 5-14 year-olds will decrease by 336 000 and the number of 15-25 year-olds by 273 000 (National Statistical Institute). The economy will have to recruit from the adult population, requiring VET institutions to train adults; this is in fact listed as a priority in the National Development Plan (2000-2006).

There is also the problem of school drop-out. According to the information received during the OECD team's visit,[2] drop-out rates were 3.8% for VET (1998/1999 school year figures). There are no data for early school leavers who leave the education system with no or very low qualifications, or for those who complete general secondary education with qualifications that are inappropriate for the needs of the labour market. Both groups are vulnerable to unemployment.

The unemployment rate in March 2000 was 18.5%,[3] compared to an EU average of about 9%. In March 2000, figures for unemployment by age group were as follows: 39.2% of the unemployed were aged between 15-24, 18.4% between 25-34, 14.9% between 35-44, 15.7% between 45-54 and 14.2% over 55.

Unemployment rates by educational attainment indicate the highest rate amongst those who only have basic and lower education or no qualifications (31.7%, March 2000). The next largest group are those with secondary vocational education (17.5%) and those who have acquired general secondary

2. "School Drop-outs: Problems and Reasons", Bulgarian National Observatory, 1999. No up-to-date figures were available to the OECD team.

3. In 2001 it dropped to about 17.5%.

education (16.4%). Most of the unemployed have no specific qualifications: 60.3% of the total registered unemployed (National Employment Service).

A characteristic of unemployment in Bulgaria is the high level of *long-term* unemployment, particularly among minority groups, young people and women. Figures for March 2000 show that the number of unemployed for less than six months (as a percentage of the total unemployed) was 25.4%. For those unemployed for more than a year this figure rises to 54.1%. Long-term unemployed with basic and lower education are 42.8% of the total. Long-term unemployed women are 54.2% of the total number of unemployed women; for men, the percentage is 54.1%.

Current status of VET

The distribution of vocational schools in Bulgaria meets predominantly regional needs. Some of the schools offer the same vocational areas as those needed in enterprises. More than half of vocational schools are situated in the biggest towns.

There are at present 47 tertiary colleges (14 pedagogical, 15 technical, 4 economic, 2 agricultural and 12 medical) in Bulgaria. Some are part of universities. The number of colleges is considered far too high for the declining number of students; moreover, they may meet the needs of the labour market. The MoES intends to restructure the college HE system, and align it with developments in the European Union.

Table 14. **Distribution of enrolled students, by vocational school type, school year 1999/2000**

Types of schools and levels	Number of schools	Number of classes	Number of pupils	Women	Men
Art schools, level three	19	231	3 539	2 096	1 443
Tehnical and vocational gymnasiums, level three	350	5 585	128 701	52 267	76 434
Vocational colleges, level four	23	307	6 798	3 821	2 977
Secondary vocational schools, level three	150	2 343	50 727	14 062	36 665
Vocational schools after grades 6 and 7, level two	2	112	2 376	674	1 702
Vocational schools after grade 8, level three	1	29	409	170	239
Total	**545**	**8 607**	**192 550**	**73 090**	**119 460**

Source: National Statistical Institute, Education in the Republic of Bulgaria, school year 2000/2001, p. 38, Table 1, p. 39, Table 3

Table 15. **Structure of school system by type of schools**

Schools	Total	Primary	Basic	Lower secon-dary	Secon-dary	Combined	Schools V-XIII	Schools VII-XIII	Schools VIII-XII	Schools VII-VIII	Schools IX-X	Vocational colleges
1.General schools	3 011	438	1 974	23	158	398	47					
Day schools:	2 996	438	1 974	23	148	398	42					
Without profiles	2 871	438	1 974	23	23	398	42					
Foreign language	62				62							
Sports	14				14							
Humanities	15				15							
Natural sciences and Mathematics	34				34							
Evening schools:	15				10		5					
2.Specialised	146	3	128		1	7	7					
3.Vocational and art schools	545							350	169	2	1	23

Source: National Statistical Institute, General and Vocational education in school year 1999/2000, p. 9, Table1 and other data of NSI.

Table 16. **Students 14-19 years old in vocational education and training in school year, 1999/2000**

	Basic vocational education, level two			Vocational education with matriculation examination, level three			Vocational education with acquisition of qualification only, level three			Vocation education after completed secondary education			Total vocational education and training		
Age	Males	Females	Total	Males	Females	Total	Males	Females	Total	Males	Females	Total	Males	Females	Total
14	390	193	583	9 256	7 135	16 391	12	9	21				9 658	7 337	16 995
15	435	185	620	30 361	17 763	48 124	70	42	112				30 866	17 990	48 856
16	307	89	396	31 950	18 433	50 383	83	61	144				32 340	18 583	50 923
17	126	27	153	27 706	15 883	43 589	48	45	93				27 880	15 955	43 835
18	56	14	70	12 727	7 547	20 274	21	10	31	270	297	567	13 074	7 868	20 942
19	35	2	37	1 415	645	2 060	3	3	6	314	367	681	1 767	1 017	2 784
Total	1 349	510	1 859	113 415	67 406	180 821	237	170	407	584	664	1 248	115 585	68 750	184 335

Source: National Statistical Institute, non published data.

Table 17. **Students in general and vocational education, 1999/2000 (ISCED 3)**

	Males	Females	Total
General education	51 512	93 475	144 987
General education in special schools	345	310	655
Vocational education with matriculation examination	114 542	68 425	182 967
Vocational education and training with acquisition of qualification only	239	170	409
Total vocational and general education (ISCED 3)	166 638	162 380	329 018

Source: National Statistical Institute, Education in the Republic of Bulgaria, school year 2000/2001, p. 31, Table 4, p. 45, Table 3, and other data of NSI.

Decentralisation of the VET system

The MoES has overall responsibility for policy development, implementation and control of initial (school-based) and post-secondary vocational education (up to higher education). It is operating the following schools: vocational schools, vocational high schools and vocational colleges.

In July 1999, the VETA (Vocational Education and Training Act) was adopted, making provision for the decentralisation of the VET system from state (MoES) to municipal, and from municipal to school levels which should allow a more focussed response to local labour market needs. At the time of the review team's visit to Bulgaria, decentralisation procedures were with the Council of Ministers for approval. The planning and implementation of the decentralisation process have major administrative and financial management implications for municipalities and schools.

In 2002, the decentralisation and optimisation process remains a priority of the MoES, with new measures envisaged.

Optimisation of the VET school network

The MoES is empowered to open, transform and close down schools according to procedures set out in the Public Education Act. At the time of the visit, the vocational school network consisted of 626 schools. During the last

two years, a total of 40 VET schools have been merged, transformed, opened or closed.

There are 30 593 teachers in the VET system. Sixty per cent are teachers of general educational subjects and 40% are practical trainers and craftsmen. Twenty-nine per cent of all teachers teach general school subjects, while 61% teach the theoretical and practical aspects of special vocational subjects. Seventy-six per cent of teachers have a higher education degree, while 22% have a post-secondary qualification and 2% secondary education only.[4]

The ratio of students to teachers in vocational schools is 11:1; and in general secondary schools, 12:1. For the system of secondary education overall, the ratio is 11:1.

The number of students decreases every year. However, in recent years (with the exception of 1997/98), the number of teachers has increased. This is a result of the new facilities for studying introduced in recent years and the increasing number of selective and optional subjects taught.

To optimise the school network, a committee has been established which consists of inspectors, directors of schools, representatives of the VET and General Education Departments of the MoES. The committee defines optimisation criteria and implementation plans, which Bulgarian interlocutors during the OECD review visit have considered vague. Furthermore, criteria do not take into account links with the education and training system as a whole.

The main objectives and criteria for optimisation are:

- to ensure competitive schools, efficient and recognised in the European Union;
- to answer to demographic developments (*e.g.* drastic decline of birth rate in Bulgaria);
- to take into account economic parameters of regions and respond to the needs of the labour market.

Based on these criteria, the municipalities together with inspectors assess the schools under their responsibility. They make recommendations on the future of these schools to the MoES, which decides. At the time of the review

4. National VET Report, 1999. Bulgarian National Observatory.

team's visit, about 20 new proposals for optimisation had been submitted to the MoES.

Although maintaining the extensive school network is a major financial problem for the state, key-stakeholders are reluctant to close schools. There is fear that closure would cause mass unemployment for teachers, who may find no employment or re-training opportunities. In addition, closing might aggregate to school-drop-out, if travel costs for students become unaffordable; and the important social role schools play in small communities may also be lost.

Co-operation between VET and the labour market

With regard to VET and labour market laws, there have been the following developments: (1) a new Law for Employment Incentives (LEI) came into force on 1 January 2002, replacing the previous law; (2) the Crafts Act was adopted in 2001; (3) a draft Law to amend and complement the Vocational Education and Training Act (VETA) has been forwarded to the Council of Ministers.

In line with Bulgaria's preparation for EU accession, the National Development Plan (NDP) for 2000-2006 in its current form defines human resource development as a top priority, emphasising better employability, employment promotion, and higher quality in VET.

Furthermore, the new Law for Employment Incentives sets the basis for national policy and strategy for vocational training of unemployed and employed people, jointly between the MoLSP and the MoES (Art. 58).

The MoES, through its VET system, provides training and retraining for adults in vocational schools and vocational high schools, which have to be financed by the trainees. Besides the VET schools there is a large number of training providers from public, private and NGO sectors.

The Ministry of Labour and Social Policies (MoLSP), through its National Employment Agency and its local labour offices, addresses training for unemployed persons who have a firm job offer. They also provide training for workers expected to be made redundant due to industrial restructuring. Although youth unemployment is a major problem in Bulgaria, there are no special training programmes for young unemployed.

The MoLSP also provides regional programmes for employment, 18 at the time of the OECD review team's visit. These include training measures related to regional employment needs (*e.g* infrastructure build-up, promotion of self-

employment, micro-projects for professional qualifications, etc. A joint human resource development strategy has been developed between the MES and MoLSP and included in the Bulgarian National Development Plan (NDP) to respond to the skills needs of Bulgaria's market economy. The NDP is currently under revision and will be re-submitted to the European Commission.

The development of a joint national strategy for continuing vocational training (CVT) has started under the European Training Foundation-funded 1999 CVT project for Bulgaria. A Bulgarian inter-ministerial national CVT strategy working group has been established and a first study prepared, which now needs follow-up.

Some special training programmes exist for young unemployed; *e.g.,* a joint Austrian-Bulgarian project, financed by the Austrian Government and carried out by the National Employment Agency and a consortium of training companies. Another special project is aimed at youngsters from orphanages (2001).

Social partners and VET

Quality in vocational education depends fundamentally on close links with the labour market on different levels, including social partners. The VET law provides the basis for major involvement of social partners in vocational education and training.

Although social partners in Bulgaria have been involved in the preparation of the VET law, actual co-operation between MoES, municipalities, schools and social partners is marginal. To date, there is no definition of roles and responsibilities of social partners for implementing the VET law.

Since the time of the OECD team's visit, social partnership involvement has improved. The work of the Regional Employment Councils, for example, progressed in 2001, with the development and implementation of regional employment programmes, which include training components – some of them for specific branches. With the adoption of the new Law on Employment Incentives, the Regional Employment Councils were transformed into Committees for Employment under the District Development Councils. The Committees advise on and monitor economic development in the regions, health and safety conditions, and training to foster employment.

Efficiency and quality of VET

The National Agency for Vocational Education and Training (NAVET) was established in February 2000. It is independent of the National Institute of Education (NIE), but located in the same building so that communication is easy. Computers were financed by the European Training Foundation, with training by the Bulgarian National Observatory.

The NAVET has the following main responsibilities:

- accredit VET institutions upon request of the institution(s) or the Minister of Education and Science, or upon decision of its Governing Board.[5]

- develop and approve criteria for accreditation in compliance with the VETA and with state education requirements.

- develop and approve accreditation procedures and related documentation.

- issue and withdraw licenses for provision of vocational training and/or career guidance.

- draft and propose to the Minister of Education and Science: a) the list of vocations for VET; b) the state education requirements for acquiring qualification in vocations; c) the state education requirements for documents in the public education system, d) the state education requirements for the assessment system of vocational education and training; e) the national assignments and the standardized criteria for the national examinations for acquiring vocational qualification.

- express opinion and propose to the Minister of Education and Science amendments to the VET school register.

- assign research projects and respective implementation in the area of vocational education, training and in career guidance.

5. The Vocational Education and Training Act was amended in 2002 so that NAVET's role in institutional accreditation has been modified.

- co-ordinate the development of strategies for vocational education and training promotion and upgrading.

- contribute to the international recognition of vocational education and training certificates.

- generate and maintain a register of the vocational training centres and the vocational information and career guidance centres.

Nearly all staff in NAVET are detached from the National Employment Office, the National Institute of Education, and the MoES. The intention is to recruit a total of 26 employees.

While NAVET is considered of utmost importance for the implementation of the VET law, the actual tasks to be implemented by NAVET, and related financial issues, need further definition and agreement by all stakeholders involved, to ensure successful operation.

As of 2002, the NAVET has developed criteria and legal documents for accreditation (*e.g.,* training courses provided by VET schools) and licensing of VET training providers (public and private), as well as a system for monitoring of training centres licensed by NAVET. In the period April 2001-April 2002, 13 training centres were licensed by working groups chaired by the Ministry of Education and Science.

Inspectorates and their involvement in VET

The 28 inspectorates for secondary education are also responsible for VET. Inspectorates consist of experts monitoring subject didactics; they concentrate on supervising how state requirements are implemented, but do not review performance of individual teachers. They also provide training for teachers in subject didactics in general education, but there is no provision for VET-specific monitoring and training.

Inspectors co-operate with MoES and the local labour office on VET curriculum development on an informal and *ad-hoc* basis. They also co-operate with municipalities, especially in the framework of VET school optimisation.

Roles and responsibilities of inspectors regarding the implementation of the VET law are vague and unclear for all key-stake-holders involved. Especially their dual role of support and control is not clear for teachers, and indeed for many inspectors themselves.

VET teacher training and training of administrative staff in VET schools

Under the EC-Phare VETERST programme (Vocational Education and Training, Education, Research, Science and Technology) three centres for VET teacher training were established as part of VET schools. This included provision of equipment and training of teachers on new methodologies (interactivity, group work, modular curricula introduction, PC skills, languages, *etc.*). In addition, some administrative staff of selected pilot schools was trained on financial and school management.

After the end of the EC-Phare VETERST programme, no financial means were allocated to further teacher/administrative staff training by the MoES. Occasionally, teachers from VET schools trained in new methodologies under the VETERST programme provide training to colleagues from other schools.

Besides the three VET teacher training centres, there are three national teacher training institutes, where VET teacher training plays only a marginal role. These centres are part of universities (Sofia, Varna) and provide training in the education process as well as in didactic issues in the humanities, natural sciences and pedagogy. The most popular courses are in new technologies and languages, and are also available for VET teachers.

Although many VET teachers have little pedagogical knowledge and skills (as they often come from industry), only limited tailor-made training has thus far been provided for them in the teacher training institutes of the universities. The Department of Information and In-Service Training of Teachers at the Sofia University “St. Climent Ohridsky” organises re-training courses in which more that 1 000 VET teachers are participating. The trainers of the Department carry out part of these courses in various cities, *e.g.* Varna and Stara Zagora, in order to reduce financial expenses of teachers.

In 2001, in-service training for 1 000 VET teachers (out of the 18 000 serving VET teachers in the 2001/02 school year) was provided by the University of Sofia's Department for Information and Upgrading of Teacher Qualifications. This was short-term training, focussed on the development of curricula and national examination tests, methodology of modular training, instruments for the assessment of student progress, etc. Although clearly there has been progress, no comprehensive system for the training of VET teachers is yet in place. There is little co-operation with the World Bank/Government of Bulgaria “Modernisation of Education” project in general secondary education, including teacher training.

Curriculum development, standards and assessment

Curriculum

Vocational schools, vocational high schools and vocational colleges deliver a national curriculum from initial training up to high school. Curricula are developed for 289 professions or specialities. Representatives of the MoES, teachers, inspectors and (on an *ad hoc* basis) social partners and industry, are involved in their development.

The curricula contain a compulsory general component guaranteeing that students acquire the general educational minimum defined by law. The main emphasis is on vocational training, including especially vocational training common for all occupational areas, and sector-oriented vocational training. While general subject areas are taught mainly at the start of vocational studies, vocational training hours prevail during the final years. This means that students from VET schools have serious difficulties in passing higher education entrance exams, and many are excluded from higher education studies.

Although the EC-Phare Upgrading of Vocational Education and Training Project (UVET) has introduced task-based, modular curricula in pilot schools, curricula remain primarily school-based, without enterprise practice. In the absence of an operating apprenticeship or work placement scheme, practical training takes place in schools, which are often insufficiently and/or inappropriately equipped. In addition, most curricula still in use in the schools are outdated when compared to “state of the art” in western European countries; Bulgarian VET curricula are highly job-specific and still prepare students for jobs which no longer exist. With their emphasis on information rather than on skills and competence, they do not prepare students for the European labour market. At present, most graduates from VET schools need further training before they can enter the labour market, or they cannot find employment at all.

With regard to new technologies and electronic learning, “e-learning” so far has not been applied in VET. Negotiations are expected between the National Contact Point for Distance Learning and the MoES, on the introduction of Open and Distance Learning (ODL) components into VET curricula. Experience from the EC-Phare Multi-Country programme for Distance Learning should be tapped.

In 2001, a fifth year for all types of professional schools was introduced, and the relevant curricula developed. This is expected to facilitate access to further education, because students will be able to acquire fully the general education minimum as well as the required professional skills.

Standards

National standards for 18 occupations of 11 occupational families have been developed under the EC-Phare VETERST programme, as follows: construction technician, economist-organiser, geodesist, car mechanic, technician in wood-processing, tailor-designer, computer technician, baker, hotel and catering, and telecommunications technician. These vocations are considered priorities in the country's economic development. The standards were piloted in 30 vocational schools.

The NAVET has developed a framework for standards development, with a pilot standard for construction technicians. Expert working groups for various vocational fields are working on standards by professions; standards for 34 professions/occupations should have been ready by the end of 2002. Although there is better co-operation between the MoES and NAVET, and the working groups for standard development are chaired by Ministry staff, there is still a need for further joint work, for example in drafting the amendment to the VETA.

Assessment

Students have to pass the following five state examinations: matriculation examinations – Bulgarian language and literature, two other general education subjects, theoretical examination in the vocation, and a practical examination in the vocation. The award of a leaving qualification certificate is based on final theoretical and practical examinations, which are held at the end of training courses, and on the continuous assessment of student skills. A credit system was introduced, on a pilot basis, as part of EC-Phare VETERST. Such a system is consistent with both continuous or periodic assessment and final examinations. Under EC-Phare VETERST, a system for evaluation, using a modular approach, was developed for all occupations covered. These results are no longer disseminated, but it is expected that this will now be done under "EC-Phare 2000" projects. A national standard for evaluation is also under preparation.

In 2001/02, the first unified national examinations ("Matura" school-leaving examinations at the end of secondary schooling) were developed and piloted.

While NAVET will play a role in updating and inter-linking curriculum development, standards and assessments systems, no systemic approach has been developed so far, and roles and responsibilities of key-stakeholders are not clear.

The current process of gathering and analysis of standard information as a basis for policy decisions is inadequate, and lacks transparency and accountability.

Financing of VET

The three main sources of finance for VET in Bulgaria at national, regional and local levels are the budgets of the state and the local authorities, the Professional Qualifications and Unemployment Fund, and external financing.

VET schools are financed from the state budget, to be devolved in due course to the municipalities and further delegated to the schools. According to the 2000 MoES report, expenditure on vocational schools amounted to 89 015 219 BGL (40 291 340 EUR).

The state and municipal budgets cover of initial VET and staff on a unit cost basis (number of students, classes, etc.). The provision of money follows a specific formula, which is non-transparent and changes every year. Additional funds are raised by the individual institutions, mainly through the provision of training courses for labour offices. VET schools also provide paid afternoon and evening classes for adults, and produce goods to sell. These additional incomes are insignificant, and in any case must be returned to the state; consequently, there are no incentives for schools to become self-financing or to make savings on their expenditures.

Overall, VET schools are in poor financial shape: their equipment is outdated, salary payments for staff are irregular, and utility costs are high (especially for heating).

Previously, the training offered by the National Employment Service and local labour offices was funded through the Professional Qualification and Unemployment Fund (PQF). The PQF was abolished under the new labour law, and from 2002 funding has come directly from the state budget with obvious implications. In 2001, 70 254 300 BGL (31 799 508 EUR) (37.3%) was spent for active labour market policy, and 227 683 700 BGL (103 057 448 EUR) (62.7%) for passive measures. Clearly, the training of unemployed people in Bulgaria is not yet a central labour market measure, because most of the available funding is spent on passive measures.

With regard to external funding,[6] according to recent data, the EC-Phare programmes (2000, 2001, 2002) have been the major donor. In addition, Bulgaria participates in the SOCRATES and LEONARDO da Vinci programmes of the EU, and there are various bi-lateral initiatives. VET therefore remains an important focus for external funding.

Sustaining VET reform

Given the present economic situation in Bulgaria, it will be difficult to keep up the momentum of VET and labour market reform. It is therefore important that human resources development continues to be supported within the framework of the National Development Plan, especially the EC-Phare programme. It is also important that MoES and MoLSP, and other relevant authorities, set coherent priorities for support for human resources development and that these be translated into a clear strategy for implementation of the reform and that respective resources are allocated.

It must be underlined that implementation of reform is not only a question of financing: it requires skilled staff in MoES, MoLSP, and related institutions to take the reform forward. Institutional capacity to implement the reform must be strengthened, with the support of programmes such as EC-Phare or the World Bank loan.

Issues and barriers in VET and adult education

- Sharp decline in numbers of young people entering the job market. The (re-)training of adults will need to become a priority for VET institutions. Special training programmes for young unemployed are also lacking.

- Students dropping out of VET schools or leaving with very low qualifications. Both groups are highly vulnerable to long-term unemployment; more needs to be done to prevent drop-out and ensure that students leave school with employable skills.

- Low efficiency in the VET system. While student numbers have declined, the number of VET teachers has increased; moreover, there is room for consolidating and optimising the VET network. Criteria for VET optimisation are still vague, and insufficiently linked with

6. Donors include the European Union, the World Bank as well as bilateral and international contributors.

parallel efforts in the general education system. Decentralisation and optimisation processes are not interlinked; better interfaces would support a coherent reform process.

- Uneven quality of VET provision. The newly established National Agency (NAVET) is expected to ensure quality in a number of ways; however, NAVET is still under-staffed and its tasks are highly demanding.

- Lack of VET specialists at the inspectorates. This means that inspectorates are unable to offer VET-specific monitoring and training to schools. This problem is compounded by the fact that many VET teachers come from industry, and have not received training in didactics and pedagogy; they are therefore even more in need of expert support than teachers in general education.

- Lack of balance in VET curricula. General education requirements are usually taught at the beginning of VET study programmes, leaving the remaining years predominantly for vocational studies. Students from VET schools thus arrive at their higher education entrance exams much less well prepared, and failure rates are high. Skills provided by VET schools rarely meet the needs of the labour market; there need to be much better linkages, and responsibilities should be shared.

- Need for wider use of Open and Distance Learning (ODL) in VET. ODL would be particularly useful for (re-)training of adults and unemployed youth.

OECD RECOMMENDATIONS

Governance and management

- Untangle the confused mix of central, municipal, and school-level financing and responsibilities. There is now a lack of transparency and accountability, which creates an environment where corruption could occur.

- Strengthen the policy-making role of the MoES. At present, for example, the Ministry of Finance in effect controls policy decisions that ought to be part of MoES' authority, so that the MoES has no real "grip" on managing education spending, and ensuring that municipalities and schools are financially accountable.

- Improve strategic planning and policy analysis capacity in the Ministry, in particular economic and policy impact analysis. This will require horizontal co-ordination and co-operation among line ministries with education related responsibilities. The Council of Ministers – where all major allocation decisions are made – should play a stronger co-ordinating role.

- Continue to take impartial, timely, consistent, and effective action against corruption through accelerating regulatory reform, reducing the "politicisation" of the civil service, and giving clear messages that conflicts of interest at any level cannot be tolerated.

- Reduce the teaching force, and design a better career structure for remaining teachers. This would save money and improve teachers' professional and financial status.

  – Provide incentives – both in terms of salary differentials and career progression – so that more young teachers enter the profession and continue their professional development. Eliminate dis-incentives: for example, inspectors now earn less than teachers, and teachers who become teacher trainers lose up to 15%

of their salary. Such anomalies are barriers against professional growth and quality assurance.

- Raise the professional status and salaries of inspectors, who need authority and credibility when they represent the MoES in introducing reforms in schools. Urgently improve the training of inspectors, and strengthen their role in teacher development. Clarify the relationship between school inspection and the appraisal of teacher performance (which is the professional duty of school directors).

- Provide funding for in-service programmes for school directors and other administrators, in particular with regard to decentralisation, staff and financial management, and whole school in-service development.

Finance

- Extend the "delegated budgets" scheme to all schools. This will mean a strong programme of general school management training – not just training in financial management; for the first time, schools will actually have "something to manage" – but few school directors, municipal and inspectorate administrators are ready for the change.

- Carefully assess and analyse the relative worth and impact of each of the four funding formulas used in the pilot municipalities, in relation to their local environment, political and educational philosophy, and level of management expertise. Determine to what extent individual municipalities should be allowed to vary their funding formula based on local conditions, and whether such discretion could lead to unacceptable local differences in the quality of education offered.

- Adapt the municipal finance system, giving municipalities more control over spending and monitoring, as well as greater accountability. The present system leaves very little budget autonomy to local authorities, mixes central and local tasks, and dilutes responsibilities to the point where there is little transparency and few incentives for rationalisation of expenditures.

Curriculum, standards and assessment

- Continue efforts to slim down curricula and increase curriculum integration and local, teacher involvement in curriculum development.

- Ensure that curricula for compulsory, core subjects cater for the whole ability range, and that standards are set at a level achievable by most.

- Re-formulate the legal definition of "general educational minimum" to reflect the reality that the majority of school leavers need to be prepared for the world of work rather than for "the next level of schooling".

- Ensure that reforms reach the classroom in a coherent manner and that teachers and school directors receive the necessary in-service training to cope with change.

- Review and simplify textbook approval and provision procedures and work with schools to develop a way to subsidise textbooks for needy children or provide them free.

- Improve the salaries and status of inspectors. Unless inspectors are respected and adequately paid, they cannot fulfil the key role they must play in reforming Bulgaria's education system.

- Work with universities towards a single-examination system at the interface between secondary and tertiary education. Once the new Matura has established itself as a reliable and respected measure of learner achievement, separate university entrance examinations should be phased out.

- Investigate the decline in student performance in mathematics and science at grade VIII level. While the recent TIMSS-R results may just be a temporary set-back, they may also be symptomatic of a more serious problem in teaching and learning in primary schools.

Education personnel

- Improve efficiency and quality. Resource allocation would benefit from a modest increase in pupil:teacher ratios (P:TR), *e.g.* from 14 to 18 in grades I-VIII and from 12 to 15 in grades IX-XII, and an increase in class size from 21 to 25 in grades I-VIII and from 23 to 25 in grades IX-XII.[1] If salary bills could be reduced, the savings could be spent on improving the quality of learning, for example through investment in teacher development.

1. World Bank calculations, 2001.

- Develop a comprehensive strategic policy on teaching that addresses the range of inter-connected elements which affect the teaching career in a modern society.

- Reform pre- and in-service policies and structures. The MoES should take a pro-active role in developing new policies, together with the teacher training institutions and with inspectorates and schools.

- Give high priority to developing a needs-driven (rather than the present supply-driven) provision of professional development courses. Co-ordination of all agencies involved, working to an agreed national programme, is needed. There is an impressive number of personnel (about 850 within the inspectorate and the institutes alone) whose potential could be used much more effectively than at present. Their training, salary and status need to be improved. Secondment of experienced teachers on a part-time basis to lead in-service work could also be useful.

- Allow teachers to receive qualification credits for courses other than those formally provided – *e.g.,* in-service offered by NGOs.

- Improve the resourcing and equipment of both pre-service and in-service providers, including the new decentralised locations.

- Provide in-service training for school directors, *e.g.,* on whole-school planning, school-based professional development, curriculum development, pupil assessment and inter-active methodologies.

- Reconsider the integration of in-service training institutions in the universities. This may not be the most effective or efficient arrangement for both parties, although close liaison between pre- and in-service providers remains essential.

Early childhood development and education

- Widen access to early childhood and pre-school education, especially in poor and rural areas where early contact of a child with trained staff is vital in the early detection of health or social difficulties that are likely to affect that child's development and learning. While more children are now attending a preparatory year before entering grade I, this may come too late for some children where early intervention might have made a significant difference.

- Ensure that the poorest and most vulnerable families are not excluded from sending their children to pre-school by the necessity to pay fees (see section on equity, above). Fees are not high in themselves, and local authorities meet most of the cost, but if there are several children in a family with unemployed parents, such fees can be prohibitive. These children are also the most likely to have nutritional and health problems that should be detected as early as possible. Collaboration with the Ministry of Health is essential for ensuring a smooth transition of 3-4 year olds into MoES care.

Social exclusion

- Keeping in mind the question, "*Who is being served?*" radically reconsider the issue of co-ordination, responsibility, and accountability among different levels and branches of government, especially in relation to funding mechanisms for poverty relief and social support.

- Approach rural development issues such as the closure of small rural schools or agricultural schools with full attention to the effects of such closures on the social fabric of communities and on the real-life educational prospects of children.

- Co-ordinate the work of various departments to create the kind of unified "child register" that provides a firm basis for its key policy and resource decisions. Social welfare registers of children in at-risk families could also be useful. Ensure that legislation is in line with the UN Convention on the Rights of the Child, which has been ratified by Bulgaria.

- Develop a coherent national policy for the social and educational protection of children, both within the family and outside it. Various initiatives based on the Convention on the Rights of the Child are underway; these should focus on the creation of such a coherent national policy, rather than on worthwhile but separate (often NGO-led) project objectives.

- Instead of treating street children as actual or potential delinquents and dealing with them mostly through the state and municipal police, adopt more community based approaches. Examples include drop-in, open-learning centres, perhaps supported by NGOs as well as

municipal authorities. Children should be helped to obtain information about social assistance and educational opportunities suitable to them.

- Support and expand youth interest programmes (clubs, activities, competitions, and festivals) and increase their share of the budget. Work with existing Adult Education Centres; also involve NGOs to provide out-of-school youngsters with a range of formal and informal education, Bulgarian language courses, vocational education and higher education opportunities leading to a marketable qualification.

Special needs children

- Ensure that money flows to every child identified as having special needs, *wherever* that child may be: at home, in a regular school, or in a special-purpose educational institution, and clarify the law to that effect.

- Continue a measured approach towards the goal of "mainstreaming" children into the least restrictive environment suitable for them, taking care not to jeopardise the interests of children in poor families and rural areas where medical support to families is not available on a daily basis. In practice, this means maintaining institutional care levels while laying the groundwork for greater integration.

- Strengthen the support to families, where possible. In Bulgaria, where society still does not easily accept special needs children and remains reluctant to integrate them into the community, this is a major challenge. Municipalities might introduce parental support programmes connected with day "clubs" or support units for disabled children living with their families, perhaps similar to the Social Rehabilitation Centres for Handicapped Children that have been set up in Lithuania.

- Develop alternative forms of institutional care, bringing living conditions as close as possible to those in families. Large institutions within which children receive their schooling as well as their full-time care tend to isolate youngsters from their communities. Smaller, mixed-age groups of children living with house parents and attending local schools allow them to mix more easily with other children. Children's village, foster care, and small family-type models have been tried in other countries, and can be low-cost and partially self-sustaining.

- Improve data collection, management, and co-ordination among different agencies providing care. A coherent database is necessary for targeted use of scarce resources. Perhaps bringing all institutionalised childcare under a single governing authority would simplify the unnecessarily complex structure and make it more transparent.

- Modernise the basis on which children are identified, diagnosed, and placed in special needs programmes. In particular, it is important to introduce modern diagnostic standards, techniques and equipment, to reduce the risks of misdiagnosis.

Equity in access, attainment and achievement

A comprehensive child welfare strategy is needed, developed by ministries responsible for family and child welfare (Health, Labour and Social Protection) as well as the MoES and relevant NGOs. This strategy could have the following educational aspects:

- Set up a national database consisting of municipal and school-level data on at-risk, drop-out, and drop-in patterns and trends. Once a relatively simple data collection system is set up, municipalities could require schools to report on their at-risk, drop-out (and drop-in) numbers, trends, and reasons, which could then be summarised and reported to the Statistical Information Centre or to the MoES. Databases already created by the EC-Phare "School for Everyone" Project could be used and expanded.

- Reformulate and refine the way enrolment, attendance and absence are measured and recorded.

- Emphasise drop-out prevention rather than punishment for non-attendance. Community outreach and child-friendly "drop-in" programmes are more likely to persuade students to stay in school than punitive measures like fines and exclusion, especially since the most common reasons for non-attendance are related to circumstances beyond the student's control such as poverty, social problems, or an inhospitable atmosphere in the school. For prevention and "drop-in" programmes to succeed, this vicious cycle must be broken.

- Promote bilingual education for minorities especially at pre-school and grade I levels, and especially for Roma children and others in non-Bulgarian-speaking families. Such programmes already exist in some regions (*e.g.,* Kardzhali, Targoviste) and should be built upon. A

Roma specialist has now been appointed in the MoES (2002) but more are needed in those regions with a significant Roma population such as Sliven where the drop-out rate is 19%. Given the size and problems of the Roma population, it is unacceptable that their educational interests are not given the same MoES attention as those of Turkish or Jewish minorities. The reality still is that out of 100 Roma students in first grade, only five (three girls and two boys) have a slim chance to complete secondary schooling, and that many physically and mentally healthy Roma children are channelled into so-called "relief schools" for mentally and physically handicapped children.[2]

- Clarify the role of NGOs in medium- and long-term education renewal policy. Many education reform efforts are currently funded and run as pilot projects by NGOs, with little thought to their long-term expansion, sustainability, or links with MoES policy.

- Improve the relevance of curricula to employment opportunities, especially in general and vocational secondary schooling where unemployment among graduates is high.

- Widen the definition of "special educational needs" to reflect a less medical and more educational view of SEN; review and clarify the Law as it relates to SEN; and ensure educational opportunities for every child in the least restrictive, and most flexible, environment appropriate to his or her needs.

Vocational education and training

- Create training programmes for adults and unemployed youngsters, where possible with the use of Open and Distance Learning and electronic learning to ensure wide access.

- Investigate reasons for VET drop-out, and help VET schools to introduce drop-out prevention programmes and ensure that all students leave school with employable skills.

- Improve efficiency in the VET system by a carefully worked out programme of optimisation. Because this inevitably means a reduction in the teaching force and closure of non-viable schools, it is important

2. Dimitar Denkov *et al*., *Roma Schools Bulgaria 2001,* Open Society Foundation Sofia, 2001, p. 10.

to ensure that stakeholders and social partners are consulted in drawing up optimisation criteria, and that these criteria are made known to the general public. Strengthen and train the staff of the National Agency (NAVET) so that it can play a key role in improving efficiency and quality in VET in Bulgaria. Its tasks are highly demanding.

- Ensure that every inspectorate has at least one specialist VET inspector capable of providing VET teachers with appropriate support.

- Review VET curricula and timetables to ensure that students keep a balance between general and VET-specific studies throughout their studies, so that they are not disadvantaged when they take university entrance examinations.

- Introduce and expand the use of computer-based and other forms of open and distance learning, especially for adults and for long-term unemployed youth.

Higher education and research

- Restructure MoES's role regarding HE, reducing its bureaucratic and regulatory role but strengthening its strategic capacity and its powers to hold HEIs accountable for the quality of the education they provide. In particular, a vastly improved data information system is needed, as well as more sophisticated skills in policy formulation and implementation.

- Support the accreditation and quality assurance mechanisms by a better understanding of the dynamics of these processes and more realistic time-scales and conditions.

- New competitive funding schemes should be beneficial for the quality of teaching and learning. However, too much may be expected from the limited resources available, and from the ability of HEIs to make the schemes work.

- Revisit the Strategy for the Development of Higher Education and, with the help of stakeholders, create a comprehensive policy document that has a built-in monitoring process to make sure it is regularly reviewed and updated.

- Create a more coherent policy for student participation in higher education: student numbers, student support and financing, learning and study patterns, issues affecting part-time students, and the promotion of post-graduate study.

- Address the issues of the unbalanced age structure, the prescriptive and unproductive regulations on teaching hours, and improvement of staff salaries in line with more affordable staff/student ratios and the injection of “new blood” into the system.

- Take a pro-active approach towards greater co-ordination and rationalisation of the HE system, through mergers and networking, and – where necessary – closure of inefficient institutions.

- Establish a coherent national policy for the R&D sector, which identifies priorities and maximises the potential for research in Bulgaria. This would involve special budget provisions for the funding of research to reach the levels envisaged by legislation, development of national criteria for the evaluation of research activities, and a substantial increase of the funding for the research councils of the Ministry.

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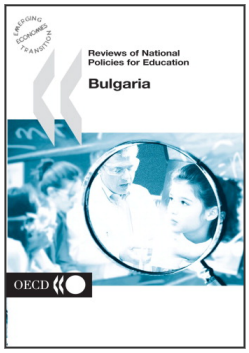

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