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Lifelong Learning Policies in Bulgaria

LLL2010 SP1 Country Report

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INTRODUCTION: HISTORICAL BACKGROUND TO LLL

This section will provide a general outline of LLL and the educational system (including main types of educational institution) in the country and indicate how the following have influenced developments:

- Political, cultural, economic factors
- Demography
- Immigration/emigration
- Minorities

(It was suggested to give more detail on last approx. 30 years; however, as each country has developed differently most relevant time period has been identified)

The Bulgarian tradition in adult education originates in 1870s when the first Sunday schools were organized. After the liberation from the Ottoman Empire in 1878 Sunday and evening schools for adult education became widespread. The Bulgarian education was organized in accordance with the most successful European practices of general education. As a result, in a short historical period the educational level of the Bulgarian population rose significantly.

The education during the period of totalitarian socialism (1944-1989) was subjected to enormous ideological pressure and constant politically motivated reforms, the result being a strongly centralized and unstable educational system. Nevertheless, it was successful in widening access to education and the priority was given to vocational education.

The notion of LLL was not used during this period. With regard to adult education and continuous vocational training the key events were:

- Law of National Education (1948), which legitimates the evening high schools and extra-mural education;
- Law for Closer Links Between School and Life and for Further Development of the People's Education (1959), which: a) recognizes the equivalence of evening and extra-mural education to regular (daily) education; b) legitimates the establishment of centers for re-qualification at higher schools;
- The establishment of an unified system for re- and further qualification of workers (1972);
- The establishment of Center for professional qualification of workers which provides pedagogical guidance to continuing education.

The "velvet revolution" of 1989 initiated the process of political and economic pluralization and integration of the country into EU structures. Now, after 16 years of changes, we witness, along with the many positive trends, impoverishment and marginalization of considerable social strata, relatively high level of unemployment, intensive emigration (almost 1 million well educated and active people left the country, whose population now is

less than 8 million) and related demographic crisis (see also Question 2). Some of the poorest and risk groups are representatives of ethnic minorities, especially Roma. There is also some immigration but for the moment its impact on the social life is negligible. All these changes together with the consequences of the globalization processes brought about the necessity for radical educational reforms. During the transition new normative basis of national education has been developed.

Nowadays, the Bulgarian educational system consists of: a) school education, which is general (2696 schools in 2003/2004) and vocational (496 schools in 2003/2004); b) higher education, which is provided by 43 universities and higher education schools and 10 independent colleges; 37 of these institutions are state and 16 are private; c) vocational qualification, which is provided by 225 centers for vocational training (2004).

At present, the only normative document entirely oriented to LLL is the National Strategy on Further Vocational Training 2005-2010 (2004). The existing LLL practices in Bulgaria are regulated by a series of normative acts not specifically dedicated to LLL: Law of Professional Education and Training, Employment Strategy 2004-2010, National Action Plan for Promoting Employability for 2006, etc. The institutions offering different forms of LLL are: evening schools; centers for vocational education and training; higher schools and centers for re-qualification at higher schools; NGOs, private educational centers, and firms. During the last two years at the state level target oriented programmes with LLL modules have been developed: National Plan for Combating Poverty and Isolation, National Programme for Roma People Qualification and Literacy, National Programme for Training of Disabled People, National Action Plan for Equal Opportunities for Women and Men for 2005.

The participation rate of Bulgarians in LLL is very low – 1, 3% (2004).

1. THEORETICAL PERSPECTIVES

A brief critical summary of the main literature which has influenced academic/scientific analysis of post-compulsory education and LLL in this country will be given. Attention will be drawn to the team's perspectives, and the main competing perspective(s) in the country will be identified.

Main approaches and literature

- Andragogical - LLL is regarded in the context of adults education and is defined as a contemporary version of permanent education [Gurova, 1998; Petrov, Atanassova, 2003: 58-60].
- (Socio) Pedagogical – LLL is a concept of (social) pedagogy. It is viewed as a real necessity for Bulgaria because of the imperatives of EU and the negative tendencies in the country – demographic crisis, increasing drop-outs in education, gaps in professional training, considerable unemployment [Golovinski, 1998; Pavlov, Petkova, 2002: 5-6; Tzakova, 2002; Peteva, 2005; Katanski, 2005].
- Sociological – the development of the LLL concept is related to the changes in the structural characteristics of contemporary societies [Boyadjieva et al., 1994], (Gerganov et al., 2001). LLL is regarded as a principle of organization of education, defined in terms of the humanistic approach (Faure et al., 1972; Hutchins, 1968; Dave, 1973, 1976; Lengrand, 1970), i.e. refusing to consider knowledge as a commodity and pupils as its passive recipients [Fromm, 1996].
- Applied and policy oriented – studied are the concrete practices and policies of LLL with the purpose to improve their implementation [Lifelong Learning Days, 2001, 2002, 2003, 2004].

Team's conceptual framework

At a more general level we share the theoretical perspectives which avoid the extreme forms of both objectivism and subjectivism and try to capture “the duality of structure” viewing the structural properties of the social systems as both “medium and outcome of the practices”, i.e. as “both constraining and enabling” individual action (Giddens, 1984: 25).

We regard LLL as an educational concept of the societies of late modernity. The re-emergence of this old idea in the LLL form during the 1990s and the way it has been developed should be understood against the background of both the social structural and cultural conditions of late modernity and the globalization processes.

We consider the following essential characteristics of late modernity as crucial in this respect (Giddens, 1990: 36-53; Bauman, 2002: 431-435):

- the constant “fluidity” of the social structures;
- the changed institutional order;
- the related development of disembedding mechanisms, which tend to free social activity from localized constraints;
- the emergence of politics as an integral and unprecedentedly important part of the habitat;
- the displacement of the self-organization of the agents in terms of a *life-project* by *process of self-constitution*, which could have no visible end;
- the changing status of knowledge and its reflexive appropriation, meaning that “to know” is no more synonymous to “to be certain”.

We also share the view that globalization affects educational national policies through variety of mechanisms thus leading to both convergence and divergence processes (Dale, 1999). Having in mind the outlined theoretical orientation we believe that:

- LLL is a principle of education whose application leads to the emergence of an assembly of different practices (institutionalized and informal, organized and sporadic, purposeful and unintended) effecting sequence of both official and hidden lessons;
- LLL includes different kinds of knowledge and skills within different perspectives (personal and social; employment and citizenship; leisure and work);
- LLL is not always a cumulative process; it could include not only upgrading but also disruptions and starting anew;
- providing counseling services is LLL’s intrinsic element;
- policy and ethical dimensions are inseparable part of both LLL’s theory and practice.

Although we share many of the critical arguments concerning the way LLL is understood and implemented (Preston, 1999; Field, 2001; Jarvis, 2001, 2004; Crowther, 2004; Borg and Mayo, 2004, 2005) in line with our theoretical perspective we see LLL as both reproducing and producing social structure and culture, i.e. as functioning as a mechanism for both social control and societal and personal emancipation.

2. INFLUENCE OF CONCEPTUALISATIONS & DRIVERS ON LLL POLICY & PRACTICE

This section will explain, and give a critical analysis, of the importance of economic, personal development, and active citizenship/social inclusion perspectives on LLL policy and practice in your country. Any significant gaps in policy or practice will be identified.

Economic perspective on LLL

The economic perspective has a leading role in the development of LLL policy in Bulgaria. This fact can be explained by:

1. Recent tendencies in the socio-economic development:
 - a) Adverse demographic situation on the labour market:
 - Long-term trend of decreasing active population. Since 1989 labour force has decreased by 6%;
 - Aging population, especially active population.
 - b) Persistent relatively high level of unemployment (12,67% in 2004) unevenly distributed in social–demographic (the highest being among low educated and Roma people) and geographic (big differences between different regions of the country) terms.
 - c) High level of poverty – 14% of the population are poor with poverty threshold 2,8 times lower than the average for the 10 newly associated countries in EU and 13 times lower than the average for the 15 “old” EU members.
2. The quality of professional qualification of human resources:
 - 20% of labour force is with basic and lower education;
 - There are deficits in the professional qualification and in the training of contemporary basic skills in the new professions;
 - Disqualification among the long-term unemployed, particularly the elderly unemployed.

Under these conditions the necessity for a longer and more intense involvement of people in active age in the economic life emerges as a crucial challenge for Bulgaria. LLL is considered a main tool for coping with this challenge.

Personal perspective on LLL

The LLL policy - as presented in the national policy documents - rests on narrow understanding of personal perspective on LLL:

1. Human capital and human resources are confined to people's professional qualification and professional education.
2. Personal development is basically related to the person's employability. According to the national report "Education and training 2010" "the basic elements of LLL concept's implementation in Bulgaria are vocational education and training for adults with the aim to improve their employability".

A broader view on the personal (as well as the citizenship) perspective on LLL could be seen in the activities of different voluntary organizations, NGOs, and private educational units. They offer courses, which aim at raising people's general knowledge and skills, enhancing the self-esteem of the individual, satisfying his/her emotional needs, stimulating self-actualization.

In relation to the personal and citizenship perspectives on LLL a crucial role is played by the Community centers (chitalishta). Being unique traditional self-managed units in Bulgaria, they function as a "training fields" for acquiring skills for managing collective activities. The core of their mission is to preserve the national traditions and to cultivate active citizenship by involving people in voluntary community initiatives, as well as to develop people's cultural interests and to enrich their knowledge of the world.

Citizenship / social inclusion perspective on LLL

Citizenship perspective on LLL is closely related to employability. On the one hand, providing employability is defined as a condition for the realization of people's right to a dignified and self-fulfilling involvement in society. On the other – LLL is mainly viewed as a factor for encouraging people's active participation in the economic life.

LLL is also regarded as a means for overcoming social exclusion of groups at risks:

1. Different LLL policies are included in the National Strategy for Combating Poverty and Social Exclusion 2003-2007. For their realization the two National Action Plans envisaged measures for guaranteeing equal access to quality education for groups at risks (long-term unemployed, disadvantaged people, people with low levels of education and qualification).
2. According to the Employment promotion law the employees receive funds for organizing a) training for acquiring professional qualification for unemployed people under 29 years; b) vocational training for unemployed and former prisoners.
3. In the framework of the project "Social Inclusion" Roma Cultural Centers were established. They provide literacy training and professional guidance to people from minority groups.

3. UNDERSTANDINGS & OPERATIONALISATIONS OF LLL

In this section a brief critical commentary will be given on how LLL has been understood, defined and operationalised in the country and the relative importance of formal, non-formal, and informal education/learning will be explained, including how effectively LLL interfaces with the formal education system.

The system (if any) for accreditation and/or certification of learning will be outlined, and a brief critical analysis will be provided.

Definition and operationalization of LLL

With regard to understanding of LLL at policy level the most important documents are: National Strategy on Further Vocational Training 2005-2010, Employment strategy 2004-2010, and National Action Plan for Promoting Employability for 2006. The National Strategy on Further Vocational Training 2005-2010 introduces the following concepts:

Continuing professional training – training of adults over 16 years old for acquiring, widening and improving professional qualification with the aim of enhancing suitability for employment, helping professional carrier, and personal development.

- Formal training and learning – carried out in institutions for vocational training in accordance with the state requirements and for which nationally recognized certificate is received.
- Non-formal training – training which is carried out as organized activity outside the formal system.
- Informal learning – a process of learning in the whole individual life course; here new knowledge and skills are acquired through various unorganized forms of individual's interaction and information exchange with the social environment.
- Lifelong learning – a process of acquisition of knowledge and skills by means of formal and non-formal training and learning, as well as through informal learning during the life span of the person.

LLL is operationalized as: literacy acquisition, knowledge expanding, professional qualification, additional qualification, re-qualification, upgrading of qualification, motivational training for adapting to labour market conditions.

The way LLL has been defined and operationalized at policy level could be criticized for: a) its narrow vocational perspective, which neglects the personal and citizenship meaning of LLL and restricts it to the mere acquisition of professional skills and knowledge; b) for substituting the notion of education with the notion of training.

Forms of education/learning

A) Formal education and training

Formal education and training are provided by different types of schools, colleges, and higher education schools. The forms of schooling stipulated in the current Law of National Education are: daily, evening, extra-mural, individually tailored, independent and correspondent. Pupils in the compulsory schooling age are taught in the daily form. The other forms are intended for adult learners.

Continuing vocational education and training is provided by: vocational schools, high schools, colleges, centers for vocational training and special units at the universities for post-graduate studies.

Due to the activities of the National Agency for Vocational Education and Training (1999) centers for vocational training have been established, which become more and more important part of the formal system for vocational training.

B) Non-formal education and training

Non-formal education and training is provided by enterprises, community centers (chitalishta). NGOs, foreign cultural centers, private educational units.

C) Informal learning

Informal learning as self-directed learning is acquired by processing visual, auditory, etc. information from sources like books, internet, mass media, museums, etc. Recently internet has become the main source of informal learning gradually replacing public libraries.

The formal education system is involved in LLL activities in two ways; a/ by organizing evening and extra-mural classes for adults and b/ by establishing special units for continuing education at school and universities.

Accreditation of learning

On national level there is no system for accreditation and recognition of non-formal and informal learning. This is envisaged to be developed in the National Strategy for Further Vocational Training by 2007. However there are already some practices of introducing a system for validation of non-formal training and learning at certain institutions, for example New Bulgarian University.

4. SIGNIFICANCE OF KEY CONCEPTS IN LLL POLICY

This section will explain and account for the importance of the following concepts in LLL policy and practice in the country:

- Learning citizens
- Knowledge society
- Learning cities/regions
- Learning organisations
- Others (if any)

So far the above-mentioned concepts have no considerable impact on LLL policies and practices in our country. No one of them is explicitly used in any of the existing policy documents.

The “knowledge society” is adopted primarily in the official discourse on ICT, whose intensive development is regarded a key element of the knowledge society building. A national initiative “E-Bulgaria” has started with the following objectives: a) improving people’s computer knowledge; b) stimulating investment in information technologies in the medium and small enterprises; c) improving the competitiveness of the Bulgarian information technology firms.

Computer literacy is defined as a key element of functional literacy in knowledge society. That is why a National Strategy on Introducing ICT in the Bulgarian Schools was accepted in 2005 by the National Assembly. The aim of the strategy is to stimulate the application of contemporary information and computer technologies in order to improve quality of education, enrich curriculum, and introduce innovative teaching techniques. The specific objectives of the strategy are: a) equipment of the schools with computers so that by 2007 ten pupils share one computer; b) achieving equal access to information technologies for all pupils, no matter of their social milieu, ethnic identity and health condition; c) incorporating information technologies in the curriculum and in teachers’ qualification programmes; d) government support for school managers; e) decentralisation of education management and enhancing the administrative capacity of the Ministry of education and science.

We have to outline that there is a tendency in the official policy documents the concept of knowledge society to be understood narrowly in terms of knowledge-based economy. For instance the programme of the Ministry of Labour and Social Policy (2005) binds the quality of human resources almost exclusively with the needs of the knowledge-based economy. Even the newly developed National Programme for School and Pre-School Education and Training 2006-2015 (2006) defends the need for redefinition of the aims of education only by referring to the requirements of the global economy.

There are some initiatives which could be regarded as first steps in building learning regions. Since 2001 national and regional “Lifelong Learning Days” have been organized. These days get together all institutions that are related to the practice of LLL: state institutions, national organizations of employers, NGOs, schools and universities. During these days the regional organizations active in LLL exchange best practices and discuss common initiatives. Important for building learning regions are the newly established

Centers for vocational training. Together with the Community centers these types of units are especially valuable for less developed and less populated regions.

There are also some positive trends in the practical realization of the idea of learning organization, especially in the case of big international companies. Up to now 28% of the Bulgarian firms have organized non-formal professional training.

Summing up: Due to the obvious vocational bias, the existing liberating and enabling potential of the discussed concepts has been overlooked to a considerable extent in the policy documents and practices of LLL in our country.

5. LEGISLATION & POLICY

This section will state what have been the key legislative/policy items on lifelong learning (in recent years), and why they have been 'key'. In addition, it will be identified:

- What other areas of policy have had or are having a driving influence on LLL policy and practice? (*for example* social security, community development)
- How important EU policy has been in forming LLL policy in your country? In particular, what impact (if any) have the Lisbon strategy and goals had? Please give some examples.
- How important has been the policy of other international organisations (UNESCO, OECD, etc.)? Please give some examples.
- How well policy is co-ordinated between various government agencies (including national, regional and local levels of government)? What are the key government agencies involved? How are the problems of co-ordination being addressed, and how effectively?
- What are the key stakeholders/social partners/NGOs, and what has been their relative influence?

In recent years the key policy items on LLL in Bulgaria have been connected with further vocational education and training. The two main acts in this sphere are Employment Promotion Law, which regulates vocational training for adults at the work place, and the National Strategy on Further Vocational Training 2005-2010. The Strategy defines five priorities: 1) Facilitating the access to further vocational education; 2) Improving the effectiveness in the coordination among the institutions; 3) Providing high quality; 4) Increasing investments, and 5) Research on further vocational education.

The importance of further vocational training reflects the governmental policy for increasing the investments in human resources as a means for *promoting employment*. It is also viewed as a way to answer the strong concerns which recently have been constantly expressed by the employers about the quality of education provided by the formal education system.

- *Social security policy* is influencing LLL practices mainly through the adopted normative acts. Thus, 1) the unemployed who engage in vocational training receive stipends, 2) in order to exclude passive labour market attitudes an amendment to the Employment promotion law was passed in 2005. It introduced a sanctioning provision for deregistration of unemployed persons who refuse to take up offered appropriate training.

- *Community development and reducing poverty* are two other policy areas, which have had a driving influence on LLL policy. In Bulgaria there are significant and long lasting regional differences in economic development, labour market and unemployment. One of the aims of the Employment Strategy 2004-2010 is overcoming the existing disproportion and achieving a balanced and stable development of all regions, by means of different initiatives, with the LLL practices included.

Under the National Programme “Overcoming Poverty” in the 13 poorest municipalities unemployed people are offered literacy courses, vocational training, subsidised employment and self-employment.

Vocational training centers and NGO’s designated to answer the particular needs of a given region have been established. Together with the Community centers they are especially important for less developed and less populated regions where even schools do not exist.

- The EU policy has crucial importance in forming LLL policy in Bulgaria. As stated in the National Report “Education and Training 2010”: “The Republic of Bulgaria as a candidate country for accession to the EU takes into account the European strategies, policies and practices in the domain of education and training in the development of its national policy. The Lisbon strategy till 2010, the Lifelong Learning Conception, the Education and Training 2010 program, the European Employment Strategy, etc. are leading us...”

- Bulgaria is very sensitive with regard to all initiatives coming from international organizations. They act as “trigger” which puts in motion national activities. Thus, the UNESCO report - “Education: The Hidden Treasure” - was very soon translated into Bulgarian and induced the organization of a national conference [Delor, 1997]. In accordance with the recommendations of the Dacar conference for development of “Education for All” a National forum for education for all was established and two national reports were prepared. [Stanev, 2002].

Bulgaria was among the first countries which joined the consultation process concerning the European Memorandum on Lifelong Learning.

The Bulgarian policy in the LLL is strongly influenced by the European policy through the mechanisms of borrowing, learning, and imposition. As a rule the European initiatives are accepted without critical assessment (even in the academic circles). As stated in the National Report “Education and Training 2010”: “Bulgaria has accepted entirely the basic formulations and ideas of the Memorandum, and has begun to implement them...” However, because of inadequate administrative capacity for implementing the adopted policies some of them remain on the level of a policy declarations and documents or are accepted formally.

- The co-ordination of LLL policy is provided by: legal mechanisms; agreements between different institutions; establishment of inter-institutional working groups; regional co-ordination councils. The National Agency for Vocational Education and Training is the state body for co-ordination of the institutions for professional guidance, vocational training and education. The functioning of all mentioned co-ordinating mechanisms has not been evaluated yet. It seems that at governmental level there are some concerns regarding the efficiency of the co-ordination process. This situation can explain the fact that improving the effectiveness of the co-ordination among the institutions is defined one of the priorities of the National Strategy for Further Vocational Education. The Action Plan for 2005 envisages concrete activities in this area.

- The key stakeholders in LLL are: National Agency of Vocational Education and Training, Ministry of Education and Science, Ministry of Labour and Social Policy; non-governmental foundations (“Potential”, “Development of the Civil Society”, “Incobra”,

“Time”, “Care”), NGOs and voluntary organizations (Open Society Institute, Center “Open Education”, Federation of the societies for dissemination of knowledge), private educational units (“Europe”, “Faros”, “Meridian-22”, “Detelina”). The most influential among state agencies are the National Agency of Vocational Education and Training and the Ministry of Labour and Social Policy and among NGOs - Open Society Institute and Federation of the societies for dissemination of knowledge.

6. MAIN PATTERNS OF PROVISION & PARTICIPATION

This section gives a brief critical overview of patterns of provision and participation in LLL in the country and explains how they have changed over the last approx. 10 years (or other period significant to the country). Pay attention to:

- patterns of participation by gender
- all sectors, *including* literacy, ICT, citizenship, access to higher education
- patterns of participation by ethnicity, social exclusion, age, etc.
- extent and nature of funding (private and public) available for LLL.

The section will also comment on the extent, and reliability of the data available.

As a general impression, we can claim that since 1989 there has been a clear tendency of increase in the number and the diversification of the institutions offering LLL. Especially discernable is the effort of the state to support vocational education and re-qualification of people over 16 year of age by licensing Centers for vocational education and training. Another peculiarity is the introduction and spread of programmes targeted at concrete social groups, such as Roma people, low literate, long-term unemployed.

The only comprehensive study of LLL in Bulgaria was carried out in 2003 as module of the Labour force survey according to the Commission Regulation No 1313/2002. The sample comprises 33 000 respondents above 15 years old. Some of the data are published in the Commission Staff Working Paper (2005). However, because of the different definitions of “adult learner” in the different surveys the comparisons of the data obtained are not very reliable. Due to this we can not distinguish (with the exception of the access to higher education) specific patterns of participation in LLL in our country.

Gender

The data show that women are more committed to LLL. In 2003 1,6% females (aged 25-64) participated in LLL whereas the percentage for males was 1,2%; in 2004 the data was similar - females – 1,4%; males – 1,1%.

Age

The most active learners are between 15 and 24 years of age – 45% of them, 29% of those between 25 and 34, 24% of 35-44 years old, 19% of 45-54 years old and 3% of 55-64 years old participated in LLL in 2003.

Ethnicity

35,2% of Roma population in Bulgaria between 25-64 years of age have elementary and below elementary education, 12,7% are illiterate. Due to this fact, special measures for enhancing their literacy and vocational training have been developed. For example, the National programmes “From social aid to employment”, “Overcoming poverty”; projects: “Social integration”, “Urbanization and social development of the regions with prevailing minority population” (Second report, 2005).

Region

There are significant differences in participation in LLL not only between town and village, but also by region. For instance, in the region with the highest level of participation 25, 3% of people aged above 15 years are involved in some form of LLL, whereas in the region with the lowest participation this percentage is 16,5.

Access to higher education

After the “velvet revolution” in 1989 we witnessed a sharp increase in student enrolments in higher education – from 156 536 in 1990/1991 academic year to 247 012 in 1998/1999. Since 2000 year there has been a decrease in enrollment – 215 712 in 2002/2003 and than again increase - 219 477 in 2004/2005. At present about 40% of school leavers enter higher school.

Funding for LLL

The financial sources for LLL are:

- funds raised through national and regional projects;
- target oriented state programmes;
- foreign aid - structural funds of the EU, including funds for the candidate-countries: Phare 2000, ISPA and SAPARD.

According to the Law for employment promotion annual state budget for professional qualification is assigned.

There are no special measures to promote investing in vocational training except the measures stated in the Law of Income Tax and the incentives for employers envisaged in the Employment Promotion Law.

7. BROADER SOCIAL POLICY & LLL

This section will reveal to what extent have issues of broader social policy (*for example*: employment policy, social security policy, community development policy) been incorporated into LLL in this country and comment on the relative impact of these policies in relation to:

- Gender
- Social disadvantage
- Ethnicity
- Religion
- Age
- Any other areas of specific importance in the country.

In Bulgaria not the issues of broader social policy have been incorporated into LLL, but vice versa – the LLL policy has been incorporated into other social policies.

Employment policy

LLL policy in Bulgaria is very closely related and subordinated to employment policy. The Employment Strategy 2004-2010 defines as action priority “Improvement of quality of human capital and stimulating the policy of LLL”. The measures to be taken include *“elaboration of national strategy and action plan for development of LLL in order to enhance the suitability and adaptability for employment of labour force”* (It. ours). It is in the Employment Strategy 2004-2010 that we find the most elaborated national concept for LLL and its policy. The National Action Plan for Promoting Employability for 2006 also states that “we will strive for widening the access to and raising the quality of LLL, in order to enhance the suitability for employment of labour force“. It envisages different educational policies and measures - improving and widening access to education; guaranteeing equal access to quality education; reducing the number of dropouts, adapting the educational system to the needs for new competences, etc.

The Employment Strategy 2004-2010 pays special attention to the issues of gender, ethnicity, social disadvantage and age by defining as priorities: increasing labour supply and promoting active aging; development of policy for equal opportunities for all social groups (be they gender or ethnic); development of active policy for integration of groups at risk.

Social security policy

See section 5.

Community development policy

See section 5.

Ethnicity

A Strategy for educational integration of children from the ethnic minorities and an Action plan are underway. The Strategy guarantees equal access of children from the ethnic minorities to qualified education and promotes their cultural identity. It defines specific objectives for each minority. Priority is given to integration of Roma children. A Center for Educational Integration of Children and Pupils of Ethnic Minorities was established in 2005. The Center will raise funds and will conduct competitions for regional projects for implementation of the Strategy.

The Framework Programme for Equal Integration of the Roma People in Bulgarian Society (1999) and the Action Plan (2003-2004) stipulate the development of specialized programmes for making elderly Roma people literate and for their vocational training as well as establishing 12 Culture centers across the country.

Gender

National Action Plan for Equal Opportunities for Women and Men for 2005, abolishing discrimination and improving the status of women in all social spheres has been functioning since 2005. Regarding education the following measures are envisaged: a) introducing gender education in the curriculum of the higher schools for teachers' qualification; b) dissemination of the existing programmes in gender education; c) changes in the state requirements for textbooks with the task to exclude all illustrations and texts implying gender discrimination.

Age

Age is important issue in social policy in Bulgaria because of the already mentioned demographic crisis. In relation to LLL the following measures are important:

- a. Removing the age restrictions in legislation with regard to the access to vocational training and higher education.
- b. Facilitating the access to education for all age groups by introducing different forms of education (part-time, evening, distance education, evening schools, free faculties at universities).

- c. Achieving equal chances for all ages through positive discrimination. According to the Employment promotion law two age groups emerge as an object of special attention: unemployed young people up to 29 years of age and unemployed people close to retirement.

Social disadvantage

In relation to the inclusion of people in disadvantage conditions a policy has been introduced based on: 1) the idea of active participation in job search rather than living on social aid; 2) differentiated approach which takes into account the specific needs and characteristics of each group. National programmes offer jobs, professional training and literacy courses predominantly for unemployed people with low or no qualification.

In the Law of Integration of Disabled People (2004) there is a chapter on education and professional qualification of people in disadvantaged condition. Adults with disabilities have the right to take part in educational programs free of charge.

The national plan for integrating pupils with special educational needs introduces integral education for these children. Its objectives foresee: a) changes in the legislation; b) changing of social attitudes; c) qualification of teachers to work with disabled children; d/ introducing individualized educational programmes; e) adopting specialized teaching materials; f) creating adequate architectural environment.

Religion

Religion is not a separate issue in social policy. It is part of the broader issue of ethnicity.

In the sphere of education some of the religious denominations (mainly Muslims) are very active organizing activities strictly related to religious education.

8. EFFECTIVENESS OF LLL POLICIES

This section will show what evidence is there (*for example*, statistics on participation) on whether LLL (or equivalent) policies in your country are achieving:

- their stated objectives, and/or
 - the objectives of international LLL policies (from EU, OECD, etc.), and,
- What have been the tensions between different areas/purposes of policy

In answering this question we will organize the corresponding quantitative and qualitative evidence in accordance with the key messages of the EU Memorandum on LLL:

New basic skills for all

The involvement in vocational education and training (VET) of unemployed people with basic education in 2004 rose (compared with 2003) by 8,3 %, of those with primary and lower than primary education – by 5,1 %. The involvement of employed people in VET rose by 49 %.

Growth of tertiary graduates from Mathematics, Science & Technology (MST) in 2000-2002: 29%;

Graduates in MST as % of all graduates in tertiary education: (2000) 17,3; (2001) 19,2; (2002) 26,5.

Number of tertiary graduates in MST per 1000 inhabitants aged 20-29 in 2000-2003: (2000) 6,6; (2001) 7,9; (2002) 11,7; (2003) 8,3.

Civic knowledge of pupils (14-15 years), mean scale score in IEA civic education study of 1999: 98.

Distribution of pupils (%) in general and pre-vocational lower- and upper-secondary education, according to the number of foreign languages learned (2002): no languages – 1,8; one language – 62,9; two languages – 34,6; three or more languages – 0,7.

Ratio of pupils to computers in schools attended by pupils aged 15 (2000): 47.

Investment in human resources

Public expenditure on education as % of GDP: (2000) 4,41; (2001) 3,53; (2002) 3,57.

Expenditure on educational institutions from private sources as % of GDP: (2001) 0,9;

Enterprise expenditure on continuing vocational training courses as a % of total labour costs: (1999) 1,0;

Total expenditure on public and private educational institutions per pupil/student in EUR PPS, by level of education, 2001: (ISCED 1) 1,0; (ISCED 2-4) 1,1; (ISCED 5-6) 3,2.

Expenditure per pupil/student compared to GDP per capita, 2001: (ISCED 1) 16; (ISCED 2-4) 19; (ISCED 5-6) 55.

Innovation in teaching and learning

% of teachers aging 50 or older, primary education (ISCED 1): (2000) 15,2; (2001) 14,5; (2002) 15,0.

% of teachers aged 50 or older, secondary education (ISCED 2-3): (2000) 22,3; (2001) 22,0; (2002) 22,9.

Ratio of pupils to teaching staff, primary and secondary education combined (ISCED 1-3): (2000) 13,2; (2001) 13,6; (2002) 13,5.

Frequency and nature of computer use for 9-years-olds (IEA PIRLS 2001): (search for information) 5,3; (writing) 9,7; (reading) 12,3; (development of reading strategies) 9,8; (communication) 0,0.

It is worth noticing that some Universities (the New Bulgarian University and the American University in Bulgaria, for example) really seek to introduce innovative methods, especially student-centered learning, in their educational practices.

Valuing learning

We do not have at our disposal quantitative data on this message (and on messages 5 and 6). What we can say is that in 2000 a National Agency of Vocational Education and Training was established. It was designed to license and coordinate national vocational education and training activities and institutions, especially the vocational training centers. With regard to the system of higher education, however, there is still no unified coordinating mechanism for evaluating and coordinating the LLL activities.

Rethinking guidance and counseling

Career guidance services and consultations are mainly developed for the VET sphere. These services are normatively regulated by the Law on VET (LVET). The career guidance task is imposed upon the Centers for information and career guidance. As a

result of projects under different European educational programs some of the higher schools already established such Centers but, as a whole, the system for career guidance is not thoroughly developed so far in the higher education sector.

Bringing learning closer to home

According to the amendment to the Law on National Education (2002) “the children with special educational needs and/or suffering from chronic diseases enter special schools and servicing units”. According to the amendments to the LVET (2002) “for pupils with specific educational needs, vocational education and training shall be provided according to their respective disability; they also envisage ensuring VET for pupils raised in social-care institutions, for deviants as well as for prisoners”.

The access to higher education for groups in special risk for exclusion is regulated by the Law on Higher Education (LHE). In its new provisions (2004) the LHE encourages higher schools to elaborate programmes for distant learning geared to disabled people. It stipulates also that “Students, PhD-students and students undergoing specialization – orphans, blinds, deaf, I and II group disabled, mothers with up to 6-year-old children have the right on special relief regulated by the rules... of the respective higher school”.

There are some other indications of progress with regard to this message: The Ordinance on State Requirements for Organization of Distance Education in the Higher Schools (2004), which arranges at last this matter, and the establishment after 2002 of the, although unevenly distributed throughout the country, Centers for vocational education and training.

To this evidence of progress on the six messages we have to add some information about progress towards European benchmarks:

- The % of the population (20-24) having completed at least upper secondary education in 2002-2004: (2002) 77,5; (2003) 75,6; (2004) 76,0 (European objective - 85%);
- The % of population aged 25-64 participating in education and training in four weeks prior to the survey, 2002-2004: (2002) 1,3; (2003) 1,4; (2004) 1,3. (European objective: 12,5%);
- Early school leavers: 22,4% (2003) (European objective: 10%).

Conclusion

Our general impression is that the investigated national policies are not informed so far by a global and clear vision of LLL. The consequences of this fact might be found out in the following deficiencies of the existing policies: the long since planned national strategy on LLL is still not prepared; there is an obvious “vocational bias” as well as a connected

neglect of the “self-directed learning” and “promoting active citizenship” dimensions of LLL. Because of the serious economic problems (especially, the relatively high level of unemployment) and the dramatic lagging behind the “old” EU member-states with regard to ICT accessibility, little or no attention is given to both the rights of employees to negotiate paid educational leave (for beyond-vocational learning) and the negative effects of the excessive use of ICT for learning purposes.

Nevertheless, there is still some sense of momentum: national objectives on LLL are already formulated in the National Action Plan for Promoting Employment (2006) and the Action Plan for Implementation of National Strategy on Further Vocational Training (2005); these objectives, however, doesn't include quantitatively formulated country specific ones as well as objectives which are subject to exact estimates. What is even more important, the Ministry of Labour and Social policy sets as its objective until the end of 2006 to prepare the long awaited National Strategy, National Program and the corresponding normative acts on LLL.

9. POLICY RECOMMENDATIONS

In spite of the existing positive elements, the national policy in the area of LLL as a whole still lacks systematisation and continuity. The positions declared and the strategic intentions stated have still not been implemented in concrete, coherent measures. (Indicative is the fact that in the recently developed by the Ministry of Education and Science National Strategy for School and Pre-School Education and Training 2006-2015 LLL is not mentioned at all.)

At present in Bulgaria the main policy aims in the sphere of LLL are twofold: a) widening and facilitating access to LLL, and b) raising quality of education and training.

In order to achieve these aims and transform LLL from a slogan into real organizing educational principle of both state institutions and civic society at the national, institutional and individual level the following initiatives are of crucial importance:

- Development of a national strategy for promoting LLL designed and synchronized at national, regional and institutional level. We mean a strategy, which observes the complex character of the principle of LLL and anticipates ways and means of coordinating the efforts of the different institutions and organizations.
- Elaboration and implementation of a holistic vision of LLL. At present, LLL is seen predominantly in the context of vocational education and training. The development of this holistic vision should be accompanied by the understanding that the realization of LLL requires a radical change in the very understanding of education and learning (including their non-formal and informal components) and a re-evaluation of all elements of the traditional educational practice – from what knowledge and curriculum are, to methods of assessment, organization and management of the teaching process.
- Promoting of approach which relates LLL simultaneously to the formal education system, the activities of the civic society and the individual efforts.
- Development of a flexible and diverse institutional network for LLL, which connects institutions of formal, non-formal and informal education with the work place and the civic society.
- Development of coordinated and interrelated legislative acts, based on common conceptual framework of LLL.
- Development of mechanisms for recognizing and validating the non-formal and informal learning. Implementation of a National system of standards for professional qualification and certification.
- Diversification of the financial sources for LLL and stimulation of private investment in it.

- Improvement of qualification of teachers working in the LLL. Development of Master programmes in LLL.
- Special initiatives in order to overcome the unequal opportunities for continuing education and training among the different regions of the country.
- Development of ICT skills and building appropriate ICT structure.
- Raising the public awareness of LLL. Development of information and counseling system about opportunities for LLL.
- Stimulating scientific research in the sphere of LLL.
- Increasing the availability and open access to adequate information for the implementation of LLL by means of:
 - timely gathering of information on the social needs for education and the schools' capabilities of satisfying them,
 - permanent and systematic information on the problems related to the implementation of LLL and the assessment of the LLL practices.

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GENERAL CONTEXT OF THE LLL 2010 RESEARCH PROJECT

In March 2000, the then 15 European leaders committed the European Union to become by 2010 “the most dynamic and competitive knowledge based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion, and respect for the environment”. The Lisbon strategy, as it has come to be known, was a comprehensive but interdependent series of reforms, which has significant implications for a whole range of social policies, including policies for learning.

As part of the Lisbon strategy, the European Union has set the goal of raising the number of adults participating in lifelong learning to 12.5% by 2010. However, the proportion of learning adults in Europe differs widely across countries. The project "**Towards a Lifelong Learning Society in Europe: the contribution of the education system**", which forms part of the European Commission’s 6th Framework Research Program, is dedicated to identifying the reasons behind these differences and to studying the policies and practices related to adults’ participation in and access to lifelong learning in a number of European countries (see project’s web-page [http:// LLL2010.tlu.ee](http://LLL2010.tlu.ee)).

The project involves researchers from thirteen countries and regions of Europe: Scotland, England, Ireland, Austria, Belgium, Slovenia, Czech Republic, Estonia, Lithuania, Hungary, Bulgaria, Norway and Russia.

Project objectives

The objectives of this project are to:

- Show to what extent the countries differ in terms of patterns of lifelong learning.
- Reveal how these differences depend upon specific institutions and policies of each country.
- Assess the contribution of each country’s education system to the development of lifelong learning.
- Trace the ways institutional and policy prerequisites for lifelong learning have been developed in European countries.
- Identify the barriers to participation in lifelong learning in terms of policies, educational institutions, enterprises’ practices and potential learners’ motivation.
- Identify the best solutions and most successful practices in terms of participation in lifelong learning and to decide to what extent these would be applicable in other countries.
- Propose changes, which would enhance adult participation in lifelong learning and decrease social exclusion.

The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

Potential impact

Project is expected to contribute both to competitiveness and cohesion of the EU by (a) developing and carrying out a joint agenda for a better understanding of the tensions between the knowledge-based society, lifelong learning and social inclusion in the context of enlargement of the EU and globalisation, (b) identification of best practices and

suggestion of ways for implementation in order to reach the objectives for lifelong learning. The LLL2010 research project extends over five years (commencing in September 2005), and these questions will be addressed in various ways through five sub-projects.

The plan for disseminating the knowledge

The project aims to examine and report on national differences in approaching formal lifelong learning, but also to assist policymakers and practitioners in learning appropriate lessons from contrasting practice in other countries. Therefore, disseminating knowledge to relevant audiences – individuals, institutional actors and policymakers – is of the core issues within this project, and so dissemination activity will take place throughout the life of the project.

The preliminary results will be discussed in the workshops and conferences and introduced to national as well as international audiences. The results of the different research projects within LLL2010 will be presented in five comparative reports – one per subproject – and a final report, and two books will be published as a result of the project. A Conference “The Contribution of the Education System to Lifelong Learning”, scheduled in the end of the project, is aimed at discussing findings, conclusions and expert opinions on a European level.

To contribute to scientific discussion and enhance comparative studies in the field, further analysis of the results of the research will take place in articles published in specialized and interdisciplinary journals. As LLL2010 will undertake a number of original studies, the data, questionnaires and codebooks, and all the other relevant materials generated in the project will be made available to the scientific community at large.

Results achieved

The present summary covers the findings of the team during the first Sub-project, ‘Review of Literature and Policy Documents’; the full comparative report of the results of this Subproject will be made available on the project website by the end of 2007. The Subproject undertook comparative research on lifelong learning policies and practices. The aim was to review how lifelong learning is being conceptualised and put into operation across a range of countries in Northern, Central and Eastern Europe.

Purpose & Methodology of Sub-project 1

The purpose of the first Sub-project was to review how lifelong learning is being conceptualised and put into operation across a range of countries in Northern, Central and Eastern Europe. The nature of the educational and lifelong learning regimes in each country, and how they are changing, were investigated. The report considers how far lifelong learning has entered the policy rhetoric in each country, and in what forms it has done so – in particular, how far it has been shaped by the European Union’s thinking, or by national or other influences. It considers how far rhetoric and practice diverge in each country. It also considers how far actions of different areas of policy and government support lifelong learning, or hinder its development.

The Sub-project applied a comparative documentary analysis of approaches to lifelong learning, through analysing national policy documents and addressing lifelong learning in participating countries.

Research Institutions in LLL2010 Consortium

1. Institute for International and Social Studies, Tallinn University, Estonia
2. Higher Institute for Labour Studies, Catholic University of Leuven, Belgium
3. University of Nottingham, England, United Kingdom
4. Moray House School of Education, University of Edinburgh, Scotland, United Kingdom
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7. Slovenian Institute for Adult Education, Ljubljana, Slovenia
8. TÁRKI Social Research Centre, Budapest, Hungary
9. Centre for International Relations and Studies, Mykolo Romerio University, Vilnius, Lithuania
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