

SUMMARY PROJECT FICHE

1. Basic Information

1.1 Désirée Number: **BG 0202.03**

1.2 Title: **Life Long Learning and Vocational Education and Training**

1.3 Sector: **ESC**

1.4 Location: Targeted regions within Bulgaria

2. Objectives

2.1 Overall Objective(s):

- Improving the adaptability and competitiveness of the work force through a Life Long Learning system in accordance with the dynamics of the labour market.
- Support the wider reforms of vocational education and training.

2.2 Project Purpose:

Ensuring quality vocational. education and training in compliance with the requirements of the labour market

2.3 Accession Partnership and NPAA priority

The project will support the objectives in the Social Cohesion chapter of the “Free movement of persons” and “Employment and social policy”:

“Continue to pursue alignment of mutual recognition of qualifications and diplomas and introduce required administrative structures, education and training programmes”.

“Continue to support social partners’ capacity-building efforts, in particular with a view to their future role in the elaboration and implementation of EU employment and social policy, including the European Social Fund and foster structured involvement of social partners, notably through autonomous bipartite social dialogue.”

The project will contribute to the overall objective of the chapter on Education, part Vocational Education of the **NPAA**: "Development of a mobile and adaptive national system of Vocational Education and Training which should take into account the social and economic requirements and the needs of the market, while guaranteeing the access of all citizens and establishing an active social partnership"

2.4 Contribution to National Development Plan

The Bulgarian Government’s policy on Human resources development aims at achieving a learning and knowledgeable Bulgarian society and a more active European cooperation in the field of education, research culture and technology which will facilitate the free movement of workers. The Government’s policy is stated in :

- National Plan for Economic Development 2001, Chapter 4 - "Improving the quality of life and adapting the human resources to the market requirements"
- The Human Resource Development Strategy;
- National Action Plan on Employment 2001.

Some of the main problems in the field of Vocational Education and Training indicated in the above documents are:

“Lack of national standards for acquiring vocational qualification and specialties developed in cooperation with social partners. “

“Outdated training facilities and premises, deteriorated equipment for practical training that hinders the adjustment of the curricula and blocks the introduction of new vocations and specialties in line with the emerging labour market needs especially in the area of new technologies. The dynamic changes of the labour market require urgent modernisation of the facilities – both for academic and practical training, including practical training in the school and on-the-job-training“

“The Continuing Vocational Training system needs strengthening in order to better implement its main role related to initial qualification, training and retraining. Inadequate qualification of part of the trainers mainly in the field of new technologies, foreign language training and modern training methods which also weaken the system.”

“Inadequate financing of the VET system.”

“Insufficient involvement of the social partners in all the stages of VET incl. the development of standards, provision of training, development of curricula both on national, regional and branch level”

This project shall contribute to the provision of quality vocational education and training, and to the enhancement of the training capacity of school directors, teachers and practical trainers as well as to the establishment of the Life Long Learning system.

2.5. Contribution to the National Plan for Regional Development

The National plan for regional development shall turn into a Regional Operational Program. The project “Life Long Learning and Vocational Education and Training” fits in the Program 7.1 “Training, Qualification and Re-training” to the priority field “Human Resources” of the National plan for regional development and constitutes an element of the national regional policy.

3. Description

3.1 Background and justification:

The Republic of Bulgaria and in particular the Ministry of Education and Science (MES) joins the European debate that has just started on the preparation and realization of the overall strategy for Life long learning (LLL). The LLL is also being considered in national aspect as one of the major factors for the development and improvement of the vocational and civil activity of the people.

In July 2001, Bulgaria joined the all-European process for gathering different opinions by submitting a National report on the Memorandum of the European Commission “Life Long Learning”. In September 2001 the national consultation process continued with the “Days of Long Life Learning” organized by the Institute for International Cooperation to the Association of the German people’s universities. In this forum took part a number of ministries (MES, MLSP, Ministry of Culture, Ministry of Defence, National Employment Service, NAVET, the national programs “Socrates” and “Leonardo”), syndicates organizations (KNSB and PODKREPA), business associations (Bulgarian Industrial Association, Bulgarian Chamber of Commerce and Industry, more than 20 representatives of foreign and Bulgarian NGOs such as GTZ/GOPA, the foundations Friedrich Ebert, Friedrich Nauman, Conrad Adenauer,

universities, the British Council, French Culture Center, the Goethe Institute Inter Natziones, Culturcontact from Austria, Compact Organisationsentwicklung – Switzerland, the German Embassy, representatives from the Delegation of the EC in Bulgaria, representatives of Bulgarian educational institutions and of the medium and small business.

Defined in various ways, the problem with Life Long Learning has always been present in our national policy. In the course of work on the Memorandum of the EC a new tendency has been set out regarding the initiatives on the problems of LLL, which is based on the existing experience. The synchronization of the mechanisms for interaction and coordination between the different-level institutions who realize the LLL is a challenge.

The key messages formulated in the Memorandum on LLL correspond to a high extent to the national priorities contained in the directions included in the Human Resources Development Strategy, in the measures and activities of the National Employment Plan – 2001.

The changes in the national education system governed by the new legislation and regulations (The Public Education Law, The Law on Degree of Education, General Education Minimum and Curricula, the Vocational Education and Training Law) are aiming at: expansion of the **foreign languages learning** by all students, realization of a national education strategy for integration into the **information-communication technologies** in the school education, the formation of **technological culture**, acquisition of knowledge and skills on economics for **entrepreneurship** development. The adoption of the new education documentation in the system of the formal education aims at the acquisition of new basic skills by all students. The modules for basic skills shall be applied also in non-formal education and training (of adults).

The structural reform in the VET sector envisaged measures to optimise the school network so as to decrease expenditures and to improve conditions at schools. Schools in scarcely populated areas will be closed down and replaced by well-equipped “central schools”.

The Employment Protection Act (Art. 25-57) ensures conditions for training and acquisition of vocational qualification for adults. In this respect the envisaged refurbishment and upgrading of the VET schools under this project will contribute to an improved training VET system, which in turn will support the implementation of the Employment Protection Act by responding more adequately to the labour market demands.

The Law on Protection against Unemployment and Promotion of Employability providing incentives for the employers who employ youths and the Child Protection Law aiming at the support of children and youths up to the age of 18 including in respect of vocational guidance and qualification acquisition are another challenge to the further development of the VET system in Bulgaria.

The present project is the next step for improving the system of the Vocational education and training and for ensuring quality training of the work force, especially for persons trained in VET schools and for those that are not included in the formal education system, in the context of the strategy for Life long learning and fighting with youth unemployment, focusing on the age group 16-29 years (statistical records on youths in Bulgaria cover the age range 16 – 29 years).

Following the studies of the National Employment Service the relative share of the unemployed youths up to the age of 29 years is 29.6% from the total number of registered unemployed. The greatest share of this group belongs to youths without any qualification – 71.3%, followed by unemployed with workers

qualification – 17.3% and with higher level of qualification – 11.4%. In respect of the degree of education, the youths of age up to 29 years with primary and lower education hold the biggest relative share – 63%. The total number of Vocational schools in Bulgaria is 444.

The vocational education and training presently cannot meet completely the requirements of the business, because the training is based more on the theory rather than the practical training. The outdated training methods obstruct the schools to achieve their optimum potential from the point of view of training efficiency. There is no adequate infrastructure for up-to-date practical training.

3.2 Linked activities:

MES is involved in the following Phare projects concerning the reform of VET in Bulgaria:

BG 95.06-01.01"Upgrading of Vocational and Educational Training (VET)". This programme resulted in the adoption of a new VET law, the creation of the National Agency of VET and the provision of new curricula in a wide range of up to 18 occupational areas;

BG 0004.04" Renovating Vocational Training Institutes" under the Phare 2000 programme. The project aims to improve the quality of vocational training provision in the South Central and North West regions through the provision of better training facilities and their more effective usage.

BG0102.05" Labour Market Initiatives" (Phare 2001 programme).

The project purpose is to increase the level of entrepreneurship, employability and adaptability of the labour force and particularly of the disadvantaged groups.

Other projects in which MES is involved and which contribute to the harmonization of vocational qualifications with the standards of the EU.

Project under the Stability Pact "Establishment of a Regional Network for Economic Education on a School Level in Bulgaria, Romania and Albania"

Project under the Stability Pact "Education and Training in Tourism in South-Eastern Europe"

Project " Vocational training of socially disadvantaged youths" – the project is carried out in partnership with MES, MLSP, MD and GOPA (a Society for organization, planning and training).

3.3 Results:

The expected results can be grouped in the following two components:

Component A - Upgrading of 11 VET Schools to facilitate transition from school to work and to implement a system for Life Long Learning in VET Schools.

1) Upgrading of 11 VET schools into "Schools of Excellence"

- 11 VET schools refurbished
- 11 VET schools equipped with up-to-date training equipment per vocations
- 11 VET schools supplied with IT equipment
- 11 seminar school halls equipped
- Provided adequate training to 40 unemployed youths followed by an employment in the refurbishment of the 11 VET schools

2) Training of trainers

- New training skills acquired by 200 school trainers in effective teaching and learning methods, interactive methods of training per vocations (14 day courses);
- 100 trainers trained in IT skills (14 day courses);
- 40 school management staff trained in 7 day workshops on management in strategic development of VET schools in life long learning perspective, appropriate partnerships, project management and learning environment;
- 100 laid-off young teachers re-trained and improving their qualification and capacity for work with target groups by means of 10 day workshops;
- Experience in program development and in establishing links between schools and enterprises disseminated and cascaded in 2 day final seminars to the school management staff of about 50 other VET schools not included in the project.

3) Provision of initial and continuing vocational training in the "Schools of excellence"

- 2080 full-time students and trainees trained within one year after VET schools upgrading in new skills adequate to the established labour market needs
- 15 programs for basic skills and individual-based learning developed for the target group in entrepreneurship, information technologies, social skills etc. These results will be achieved by means of a TA Service contract.

Component B - Ensuring Life Long Learning and Adaptability – (Grant Scheme)

- Seminars for trainers in methodology of programs development (under TA Service contract)
- Up to 20 vocational training programs developed by the beneficiary VET schools on request of social partners and concerned institutions, intended for the acquisition and improvement of young workers qualification
- 120 school trainers receiving 10 day on-the-job training in companies/factories on the use of new technologies and equipment
- 100 factory trainers acquiring pedagogical skills in 5-day training seminars;
- On-the-job training provided to 2080 students and trainees
- Strengthened links between VET schools/training providers and enterprises ensuring better quality practical training

3.4 Activities:

The Memorandum of Life Long Learning cited the definition of Life Long Learning established in the context of the European Employment Strategy: “All learning activity undertaken throughout life with the aim of improving knowledge, skills and competences within a personal civic, social and/or employment-related perspective”.

In economic terms, the employability and adaptability of citizens is vital for Europe to maintain its commitment to becoming the most competitive and dynamic knowledge-based society in the world. Life long learning has a key role to play in developing a coordinated strategy for employment and particularly for promotion of a skilled, trained and adapted workforce. This means removing the barriers that prevent people from entering the labour market and social exclusion.

Higher levels of education and continuous learning make an important contribution to reducing inequalities and preventing marginalisation. This makes it imperative for the education and training systems to be adequately resourced and equipped and to find new approaches to education and training

policies within the framework of lifelong learning. The present Project focuses on the first three key message of the Memorandum on Lifelong Learning – New basic skills for all, More investment in human resource, Innovation in teaching and learning.

Target Group

The Project target group includes full-time students and youth trainees aged 16-29 years encompassing employed seeking qualification improvement, minority groups, disabled and school drop-outs, and 16-18 years old unemployed in the context of LLL. The target group also includes VET-school teachers and trainers, school management staff, laid-off young teachers and factory trainers whose participation in the project will contribute to the establishment of a modern and flexible system for qualification of teachers and trainers. Employers who may become beneficiaries under the Grant scheme are also covered by the target group.

3.4.1.Component A: Upgrading of 11 VET Schools to facilitate transition from school to work and to implement a system for Life Long Learning in VET Schools

Upgrading 11 VET schools into "Schools of Excellence"

The MES is currently in a process of optimization of the national VET schools network for ensuring quality education and training. A database is under construction including data on school buildings, capacity of the institutions providing vocational education and training. MES shall select 11 schools – beneficiaries under this project by using the available information on the status of the VET schools complying with the six priority vocational areas for development in accordance with the Government's program of October 2001, the National Plan for Economic Development and the National Plan for Regional Development.

The target regions and accordingly the beneficiary schools shall be determined on the basis of the PHARE 2000 and PHARE 2001 surveys carried out by the MLSP. The schools shall be selected by MES elaborating proper criteria under methods that have proven efficient in the studies already performed and shall be approved by the Project Steering Committee (PSC).

The selected 11 VET schools shall be refurbished and upgraded with up-to-date vocational training equipment under Works and Supplies contracts. The refurbishment shall include repair works on the school buildings and associated hostels, electrical, heating, fire-fighting, water supply, sewerage and other systems. The total amount envisaged in the budget for the upgrading of 11 VET schools is distributed as follows: 1,654 MEURO for school buildings refurbishment and 2,247 MEURO for supply of training equipment.

An inspection identifying the needs of the VET schools shall precede the refurbishment works and shall be performed by a team of experts acting as TA to the PIU. In order to fulfill adequately its day-to-day duties in respect of the project management, the PIU shall be supported by the TA team for a period of 12 months under a FWC for max. 0.2 MEURO financed under PPF 2000. The TA team to the PIU shall provide assistance by preparing the Technical Specifications (TS) for Works and Equipments, the Tender Dossiers (TD), the ToRs for the subsequent TA Service Contract under the Project.

A targeted training will be provided to 40 unemployed youths that will take part in the contracts envisaged for the repair works of the 11 beneficiary schools. The unemployed will be provided by the regional/local employment services. This arrangement will be included in the tender dossier for the works contract.

Training of trainers

The training under this component shall be provided by specialized training programs and workshops not exceeding 14 days each, focusing on innovative pedagogy - partnership working, striving for excellence, etc. The emphasis shall be on the transition from knowledge to competence and from teaching to learning. The participants in these workshops shall include 3 types of training:

- Training of 200 school teachers per professions from the beneficiary schools for introduction of innovative models of training, including interactive teaching methods. The training will aim at the improvement of their qualification in the development of programs, training materials and flexible approaches of training. Training shall be provide by 14 days courses.
- Following the National Strategy for building of an information society, 100 trainers shall be trained in IT skills for use in the teaching environment, by means of 14 days courses.
- The strategic development of the VET schools, the establishment of good partnership with enterprises and the need for development of individual projects requires the training in management of 40 school staff for the acquisition of new skills for the development of pathway approach, links with labour offices, provision of job search skills, etc.
- To regain young laid-off teachers who have lost their work as result of the current reform in Bulgaria and with the purpose to relocate them back into the VET system, a training course encompassing 100 persons shall be conducted to improve and build on their qualification and teaching capacity to work with target groups.
- With the purpose to promote the achieved good experience in programs development and school/enterprise partnerships, 2 day final seminars will be conducted between the beneficiary schools and other VET schools in the country as well as to teachers.

These training activities shall be provided by a TA team under a Service Contract.

Provision of vocational training in the "Schools of excellence"

- The developed programs for basic skills shall be approbated in the beneficiary schools with the purpose part of the programs to be integrated in the curricula for initial vocational training
- 2080 full-time students and part-time trainees (workers seeking further qualification, minority groups youths, disabled, drop-outs,) shall be trained within one year after the introduction of the specialized training equipment. All part-time trainees prior to taking part in the project will be required to pass through a vocational guidance in the Centers of information and vocational guidance to the MLSP.

The National Agency of Vocational Education and Training (NAVET)¹ shall systematically take part as much as possible in all activities of the project, e.g. by providing an upgraded List of Vocations complied with the current labour market needs so as to enable the achievement of optimum results. NAVET is represented in the Project Stirring Committee, who approves all project major stages including the development of programs

¹ This body has an important mandate according to the Law on Vocational Education and Training

3.4.2. Component B: Ensuring Lifelong Learning and Adaptability - (Grant Scheme)

The activities under this component shall be realized through a Grant scheme.

The purpose of this component is to promote the involvement of employers and social partners in the overall process of training and qualification improvement. Regional authorities of MES, MLSP, and the social partners shall take part in the determining of the trainees in the regions. The Bulgarian Industrial Association as well as trade unions and employers organizations shall render assistance for the involvement of local business representatives.

The Grant scheme (Local call of proposals) is intended to stimulate local employers providing practical training and thus facilitating the transition from school to work. Candidates for participation in the Grant Scheme can be any couple of a VET school or training provider and an enterprise who have signed a partnership agreement complied with the Grant Scheme provisions/criteria. The Grant Scheme shall be open to all VET schools as well as to training providers (both private and state) licensed by NAVET and meeting the criteria for participation in the Grant Scheme. The duration of the practical training acquired by full-time students will be in accordance with the state curricula provisions. The theoretical training in the VET schools and the duration of the on-the-job training for part-time trainees shall be determined in compliance with up to 20 training programs developed by VET schools on request of the Employers. These programs shall also be covered in the Employers/VET schools agreements.

Furthermore, employers benefiting from the Grant scheme will have to provide 10-day on-the-job training in the current technologies and equipment used, to 120 school trainers. This arrangement will be included in the contract too and will help school trainers in bringing closer the theoretical training with the up-to-date technologies and equipment used.

Generally, factory trainers are good professionals but lacking pedagogical skills. To remedy this situation through the funds received under the Grant scheme, employers will be required to have up to 100 of their factory trainers trained by 5 day seminars in pedagogical skills especially for work with youths and different target groups.

An external TA is provided for the proper elaboration of criteria and management of the Grant scheme under a Service contract.

3.5. Lessons Learned:

In elaboration of this project, MES has taken into account its previous experiences with other PHARE and bilateral projects, namely: UVET – BG 95.06-01.01, Renovating Vocational Training Institutes – BG 0004.04, Bulgarian-German Vocational Training Centers, Bulgarian-German project “Installation Technician”, Bulgarian-Austrian project “BAKTURMEN”, Bulgarian-Austrian project “Economics and Management”.

The results of those completed projects are now replicated in other VET schools not originally encompassed by the mentioned projects. Initially 30 VET schools took part in the UVET project and presently the numbers of schools approaching the modular system in their training have increased to 65. A positive experience in the field of harmonization of the vocational qualifications corresponding to those of the EU countries has also been accumulated under the above projects.

It is also noticed that schools taking part in previous projects and upgraded both in respect of infrastructure and training equipment have raised their reputation. It is proved that the interest for receiving training in those VET schools has increased.

The process of upgrading schools is recommended to continue in order to develop a national net of VET schools providing up-to-date vocational training in accordance with the needs of the labour market in a fast running society.

A further conclusion has been drawn that for the successful development and implementation of a project it is necessary to establish and secure a good coordination between the concerned ministries (MES and MLSP) and involvement of the social partners both on central and regional/local level.

4. Institutional Framework

The Ministry of Labour and Social Policy (MLSP) is the Implementing Agency for this project (envisaged Managing Authority in the field of European Social Fund as from the date of accession), and it shall be responsible for the administrative and financial implementation of the project.

The technical implementation of the project is the responsibility of the Ministry of Education and Science (MES) who is the beneficiary under the project. In order to fulfill its duties in respect of the project, MES shall establish two structures – a Project Implementation Unit (PIU) and a Project Steering Committee (PSC)

The PIU to MES shall be responsible for the day-to-day technical implementation of the project and shall be managed by a Senior Program Officer (SPO). MES shall issue a specific letter of appointment of the PIU structure, which shall include:

An SPO (Roumen Mihailov - Director of the PIU for the project of MES under PHARE 2000), a secretary and two experts. MES will use the existing PIU structure for PHARE 2000 in view of utilizing its experience. As the PIU is a structure of MES and is responsible for the overall technical implementation of the project, MES undertakes to provide assurances to the EC Delegation that the PIU shall be accordingly resourced for the whole project duration with all necessary staff, salary funds, office, office equipment, communications, transport expenses, etc.

The responsibilities of the PIU include adherence to the Practical Guide procedures in respect of implementation of the project activities. The PIU follows the daily works execution, presents reports periodically and makes recommendations to the MES and PSC. The MES shall take into account such recommendations and shall refer them to the MLSP with the purpose of achieving better results in the course of the project implementation. In this respect the PIU shall also act as a Coordinator and Secretariat to the PSC and shall summon any meeting of the PSC by a week's notice indicating the agenda.

A meeting of the PSC can be held provided that there is a quorum of 2/3 of the total number of its members.

The Project Steering Committee (PSC) provides strategic guidance to the PIU in respect of the project implementation and it is the body to which all significant issues of technical and professional nature are referred for solving by simple majority voting.

The PSC approves the ToRs and Technical Specifications, the selection criteria of VET schools, selection of beneficiary schools and the major stages of the project. The PIU refers all incoming proposals relating to the project to the PSC for approval. The composition of the PSC is proposed by the MES and approved by an order of the PAO in the MLSP and includes representatives of the social partners on central and regional levels. The composition of the PSC is the following:

- MES – 2 members + 1 Chairman
- MLSP – 2

- Delegation of the EC – 1
- Bulgarian Industrial Association – 1
- Bulgarian Chamber of Commerce and Industry– 1
- “Podkrepa” Confederation – 1
- “KNSB” Confederation – 1
- District Governor – 1 for each district where beneficiary schools have been selected
- A representative of the World Bank – 1
- A representative of NAVET – 1

The specific duties of MES and MLSP shall be explicitly described in a Memorandum of Understanding (MoU), which shall be signed before the project commencement.

These structures have the specific designation to facilitate the efficient project implementation and they shall not lead to any change in the institutional framework of the vocational training in Bulgaria. The participation of local representatives and social partners in the PSC makes this structure similar to those involved in the implementation of projects of the EU member countries and ensures the possibility for the project to be implemented in the spirit of partnership and collaboration.

The final beneficiaries under component A of the project are 11 Vocational schools which are state owned and the training equipment shall remain their property after the completion of the project.

The project implementation may be hampered on local and central levels. On local level the school masters, teachers and factory trainers should pass a training for adoption of the new training programs and also for acquisition of skills on management and operation of the new equipment with view to its optimum use in the course of training.

On central level the PIU whose major task is the overall technical management of the project, will need assistance in collecting the specific technical information from the schools for the tenders in respect of school buildings repair, supply of training equipment and management of the Grant Scheme. To this aim, two TA teams are envisaged under the project:

- TA to the PIU in the form of a FWC financed under PPF 2000, amounting to 0.2 MEURO to prepare ToR for the subsequent TA, preparation TS and TD on refurbishment works and equipment
- TA under a Service contract covering project components A and B for Training of trainers, Development of programs, Management of Grant Schemes and Works and Supplies Inspection.

5. Detailed Budget (MEURO)

	Phare Support					
	Investment Support	Institution Building	Total Phare (=I+IB)	National Cofinancing	IFI*	TOTAL
Component A:						
Refurbishment of VET schools	1,240		1,240	0,414		1,654
Procurement of training and IT equipment	1,685		1,685	0,562		2,247
Sub total	2,925		2,925	0,976		3,901
Component B:						
Ensuring LLL and Adaptability (Grant scheme)	0,700		0,700	0,233		0,933
Sub total	0,700		0,700	0,233		0,933
TA (for A+B) on Training of trainers, Development of Programs, Management of Grant scheme, Inspection of works and supplies		0,375	0,375	0,125		0,500
Sub total		0,375	0,375	0,125		0,500
GRAND Total	3,625	0,375	4,000	1,334		5,334

6. Implementation Arrangements

6.1 Implementing Agency

The MLSP in its capacity of Implementing Agency (reference: project fiche BG01.02.07; Budget List of budget allocation dd. 04.03.2002 by the EC; KPMG evaluation report on MLSP) shall implement the project through its Pre-Accession Funds and International Programs and Projects Directorate under the responsibility of the PAO. The PAO shall be responsible for the administrative and financial management of the project, the tender procedures, contracting, payments, accounting and reporting as well as the overall monitoring. The PAO shall be Mr. Radoslav Bozadzhiev – Deputy Minister of Labour and Social Policy.

The technical implementation of the project is the responsibility of the Ministry of Education and Science, working in close cooperation with the Ministry of Labour and the National Agency for Vocational Education and Training .

A Project Steering Committee (see also page 10) is planned through which policy makers and implementing agents will communicate more consistently. This should be chaired by the Ministry of Education and Science and involve the stakeholders mentioned on page 10.

6.2 Twinning:

Not applicable to the project.

6.3 Non-standard aspects:

Non-standard procedures are not envisaged. The Grant scheme shall be applied in accordance with the PHARE provisions. The Practical Guide procedures shall be strictly followed for all contracts for works, supplies and consultancy services.

6.4 Contracts

Project component	Activity	Type of contract
Component A	Refurbishment of 11 VET Schools	WORK
	Procurement of training equipment to schools	SUPPLY
Component B	Ensuring LLL and Adaptability	GRANT SCHEME
Components A and B	TA for Training of trainers, Programs development, Management of Grant scheme, Inspection of works and supplies	SERVICE

7. Implementation Schedule

7.1 Start of tendering/call for proposals

Tender procedures on works and supplies shall start within 5 months after the beginning of the project – about May 2003. The Call for Proposals under the Grant Scheme is estimated to be launched about August 2004.

7.2 Start of project activity

Beneficiary VET schools under component A shall be selected by the MES by October 2002.

The first contract for TA to the PIU is expected to start in October 2002 under the PPF 2000, as a FWC. The contracts for supplies and works shall be signed in January 2004.

7.3 Project Completion

The project shall be completed by November 2006. Due to the complexity of the Project (involving a Grant Scheme, works etc.) disbursement period will be extended to 30 November 2006. Previous experience with comparable projects (**Project BG 0004.04 Renovating Vocational Training Institutes or BG 01.02.05 Labour Market Initiatives**) justifies such an approach. Grant schemes are still fairly new in Bulgaria.

8. Equal Opportunity

The equal opportunities for men and women is a major principle which shall be observed at any stage and in any project component in compliance with the Bulgarian legislation providing equal conditions for training and work for men and women.

Bulgaria applies an equality principle of men and women in respect of vocational training and provision of employment. There are no quotas relating to gender. All persons irrespective of gender enjoy equal opportunities when applying for training or work.

9. Environment

The project does not foresee new construction works but only the supply of equipment and repair works on existing school buildings and therefore the works that will be executed shall have no impact on the environment.

10. Rates of return

Economic rates of return cannot be calculated for the whole project but for separate project components only.

11. Investment criteria

11.1 Catalytic effect:

The project shall contribute to the improvement of the vocational training quality so that those who pass training will get qualifications corresponding to the new technology requirements and to the Bulgarian structural reform which is currently very dynamic. Besides, the professional capacity of school trainers, school masters and factory trainers shall be improved. It is expected that the project results will stimulate the establishment of good cooperation between employers, social partners and vocational schools so as to enable all parties concerned take an active role in the training process. The positive experience accumulated from this project will be transferred to other VET schools and enterprises in other regions covered by future projects.

11.2 Cofinancing:

The project is calculated on the basis of co-financing from the Bulgarian national budget in ratio: 25% Bulgarian co-financing and 75% PHARE aid.

11.3 Additionality:

The portion of the EU investment funds shall be allocated in addition to the funds allocated for the project by the Bulgarian national budget.

11.4 Project readiness and Size:

Studies exist in the field of vocational training carried out by MES and also in the field of labour market – carried out by the MLSP under PPF which shall be the basis for the selection of the beneficiary schools. The project is in excess of 2 MEURO for investment projects and therefore complies with the condition for a minimum size of projects financed by PHARE.

11.5 Sustainability:

The selected beneficiary schools are state owned and shall continue to function and to be financed by the national budget in the future.

The selection of the 11 beneficiary schools shall be based on proper selection criteria and complied with the national school network annual optimization in view of enlarging the capacity of the selected VET schools so as to transform them into district central schools.

Final short term seminars shall be held at the end of the project between the beneficiary schools and other VET schools in the country to disseminate the good experience achieved in the field of programs development and schools/enterprises partnership.

11.6 Compliance with state aid provisions

The activities within the project will be implemented in accordance with the Article 92(3)(a) of the Treaty of Rome with respect to regional aid in an Objective 1 Member State

11.7 Contribution to National Development Plan

These are in accordance with those elements identified in item 2.4

12. Conditionality and sequencing

A major conditionality for the project will be the successful implementation of the Phare 2000 VET projects “Renovating Vocational Training Institutes”.

The selection of the beneficiary schools will be a basis for the project commencement and it will be carried out in compliance with the available information from labour market studies performed by the MLSP. It is necessary that the MES and MLSP sign a MoU for the detailed duties of each relating to the project implementation.

The Delegation needs to approve, before implementation commences, the institutional and implementation arrangements, including adequacy of staffing and resourcing of the bodies involved in implementation, robust arrangements for ensuring sound management of EU funds and any operating guidelines, Memoranda of Understanding required.

The major milestones in the project implementation shall be:

- Consultation with social partners on the program;
- Completion of Labour Market Study 2001
- Completion of Labour Market Study-2002
- Establishment of the PSC and PIU
- Selection of the beneficiary schools
- Refurbishment of the schools
- Supply of vocational training equipment
- Preparation and adoption of programs in the beneficiary schools
- Training of trainers
- Promotion of the programs on national and regional/local community level

Annexes to project Fiche

1. Logical framework matrix in standard format
2. Detailed implementation chart
3. Contracting and disbursement schedule by quarter for full duration of program (including disbursement period)
4. Reference to feasibility / pre-feasibility studies
5. List of relevant Laws and Regulations
6. Reference to relevant Government Strategic plans and studies (may include Institution Development Plan, Business plans, Sector studies etc)

Componen ts	2002			2003												2004												2005								2006							
	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	..	D	J	..	O	N	D			
PIU and PSC operational	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		
VET schools selected	x																																										
TA to PIU under PPF-preparation of TS, TD, and ToRs	x	x	x	x	x	x	x	x																																			
TA - Training of Trainers, Programs development, Grant scheme Inspection of works and supplies																		x	x	x	x	x	x	x	x	x	x	x	x	x	x												
Tendering of Works and Equipment								x	x	x	x	x	x	x	x																												
Refurbishment works and supply of equipment																		x	x	x	x	x	x	x	x																		
Grant Scheme																						x	x	x	x	x	x	x	x	x	x	x											
Mid-term Evaluation																					x																						
Final Evaluation																																							x				
Audit																																									x		

Annex 3

CONTRACTING AND DISBURSEMENTS SCHEDULES - Life Long Learning and Vocational Education and Training

Date	01/01/03	30/03/03	30/06/03	30/09/03	30/12/03	30/03/04	30/06/04	30/09/04
Contracted						4,401	4,401	5,334
Disbursed						2,640	2,640	4,427

Date	30/12/04	30/03/05	30/06/05	30/09/05	30/12/05	30/03/06	30/06/06	30/09/06
Contracted	5,334	5,334	5,334	5,334				
Disbursed	4,818	5,284	5,284	5,334				

Figures in Meuro

Annex 4

REFERENCE TO FEASIBILITY / PRE-FEASIBILITY STUDIES

1. Labour Market Study and VET Schools Infrastructure Study on the NW and SC Planning Regions of Bulgaria performed under PHARE 2000
2. Labour Market Study and VET Schools Infrastructure Study under PHARE 2001 (under preparation).

Annex 5

LIST OF RELEVANT LAWS AND REGULATIONS

1. Law on Vocational Education and Training – SG N 68 /1999, amended: SG N 1 / 2000
2. Law on the Level of Schooling, the General Educational Minimum and the Syllabus- 1999
3. Law on National Education-1991
4. Rules governing the implementation of the Law on National Education-1999
5. Child Protection Act
6. Labour Code- SGN 26/1986, last amendment: SGN 110/1999
7. Law on Protection against Unemployment And Promotion of Employment – SG N 120 /1997, last amendment: SG N 110/1999
8. Rule on Application of the Law on Protection against Unemployment And Promotion of Employment – SG N 81 /1998
9. Law on Small and Medium Sized Enterprises – SG N 84 /1999 last amendment: SG N 92 /2000
10. Public Education Law – SG N 86 /1991, last amendment: SG N 68 /1999
11. Law on Social Welfare – SG N 56 /1998
12. Rule on Application of the Law on Social Welfare – SG N 133/1998, last amendments – SG N 48/2000
13. Framework Agreement between the Commission of the European Communities and the Republic of Bulgaria
14. Resolution N 57 of the Council of Ministers / 21.12.1998 – “Rules for Development and Implementation of Employment Programs”
15. Employment Promotion Act-SG N^O 112/2001

Annex 6

REFERENCE TO RELEVANT GOVERNMENT STRATEGIC PLANS AND STUDIES

1. Accession Partnership
2. National Program for the Adoption of Acquis (NPAA)
3. National Plan for Economic Development
4. National Plan for Regional Development
5. National Action Plan on Employment
6. Government's Program 2001 on Priority Fields
7. Human Resource Development Strategy
8. National Strategy “Education”
9. National Program for the Information Society
10. National Report on the Memorandum on Life Long Learning
11. List of Vocations of NAVET

LOGFRAME PLANNING MATRIX FOR PROJECT	Programme name and number	
Life Long Learning and Vocational Education and Training	Contracting period expires November 2004	Disbursement period expires November 2006
	Total budget : 5,334 MEURO	Phare budget : 4,000 MEURO

Overall objective	Objectively verifiable indicators	Sources of Verification	
Improving the adaptability and competitiveness of the work force through a Life Long Learning System in accordance with the dynamics of the labour market. Support the wider reforms of vocational education and training	<ul style="list-style-type: none"> 2620 persons who have passed a training program/course and have improved their qualification Number of full-time students, part-time trainees and laid-off teachers finding employment within 6-12 months after completion of training 	Data from the National Statistics Institute; Reports from the National Employment Service; Bulletin of NAVET; Reports of the Education Inspectorates	
Project purpose	Objectively verifiable indicators	Sources of Verification	Assumptions
Ensuring quality vocational education and training in compliance with the requirements of the labour market	<ul style="list-style-type: none"> 11 VET Schools of Excellence established; 2080 students and trainees trained in the beneficiary VET schools plus additional number of trainees trained by other training providers; training programs provided to 540 teachers and factory trainers 15 programs for basic skills developed; 20 vocational training programs developed; Closer cooperation established between VET schools and Employers 	Reports of MES; Reports of the National Employment Service; Reports of the Education Inspectorates; Reports of the PIU	- Understanding and support from the business environment - Stable macroeconomic conditions for development of the business

Results	Objectively verifiable indicators	Sources of Verification	Assumptions
<p>Component A:</p> <p>Upgrading of 11 VET Schools to facilitate transition from school to work and to implement a system for Life Long Learning in VET schools</p> <p><u>1) Upgrading of 11 VET schools into Schools of Excellence”</u></p> <ul style="list-style-type: none"> 11 VET schools refurbished 11 VET schools equipped with up-to-date training equipment 11 VET schools supplied with IT equipment 11 Seminar school halls equipped 40 unemployed youths trained and employed by the companies refurbishing the VET schools <p><u>2) Training of Trainers</u></p> <ul style="list-style-type: none"> 200 school trainers trained in efficient teaching & learning methods 100 school trainers trained in IT skills 40 school management staff trained in strategic development of VET schools 100 laid-off teachers re-trained achieving qualification and teaching capacity improvement final seminars to disseminate the good experience achieved from the project to other VET schools <p><u>3) Provision of initial and continuing vocational training in the Schools of Excellence</u></p> <ul style="list-style-type: none"> 2080 students and trainees trained within one year after schools upgrading in new skills adequate to the labour market need 15 programs developed for the target group in basic skills (entrepreneurship, IT, social skills, individual-based learning) 	<p>-Number of VET schools refurbished and upgraded with new equipment for vocational training</p> <p>-Volume of refurbishment works contracted and performed and number of equipment supplied</p> <p>-Number of youths provided for employment to the refurbishment companies</p> <p>- Number of school trainers per vocations, determined by each beneficiary VET school;</p> <p>- School trainers trained from each school;</p> <p>- School management staff from each VET school trained</p> <p>- Number of young laid-off teachers and number of seminars held</p> <p>- school management staff of about 50 other schools, not included in the project and number of seminars held</p> <p>-Number of students and number of trainees</p> <p>- Number of programs in each: entrepreneurship, IT, social skills, individual based learning</p>	<p>- Interim and final reports of the relevant teams working on development of curricula and upgrading of schools</p> <p>- Reports of the PIU on the progress of the works</p> <p>- Contract signed for the refurbishment of schools and for the supply of equipment</p> <p>- Data from the National Employment Services</p> <p>- Reports from the Education Inspectorates</p> <p>- Contracts signed between employers and vocational schools</p> <p>- Annual reports from beneficiary schools</p>	<p>- Availability of framework requirements for the structure and contents of curricula per vocations;</p> <p>- Requirements of the employers in respect of correspondence between vocational qualification and contemporary equipment and technologies</p>

<p>Component B: Ensuring Life Long Learning and Adaptability</p> <ul style="list-style-type: none"> • 2080 students and trainees receiving on-the-job training in local enterprises plus additional number of trainees trained by other training providers; • Up to 20 vocational training programs developed by VET schools on request of social partners and concerned institutions • 120 school trainers receiving on-the-job training in factories on the use of new technologies and equipment • 100 factory trainers receiving training in pedagogical skills • Strengthened links between local enterprises and VET schools ensuring improved training quality 	<ul style="list-style-type: none"> - Number of full-time students and number of part-time trainees per vocations - Number of requests from social partners and concerned institutions; - Number of programs, developed by VET schools - school trainers from each beneficiary VET school receiving training - Number of factory trainers and number of seminars - Number of contracts signed with VET schools and commitments undertaken therein 	<ul style="list-style-type: none"> - Reports of the PIU on the progress of project works - Report from Education Inspectorates - Contracts signed between employers and schools - Data from the National Employment Services 	<ul style="list-style-type: none"> -Availability of VET schools ready to participate in the project -Personal motivation and willingness of trainers and trainee-youths to participate in the proposed activities -Motivation of employers and employees to take part in the project -Community involvement and support from social partners.
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Activities	Means	Assumptions
<p>Component A:</p> <p>Upgrading of 11 VET Schools to facilitate transition from school to work and to implement a system for Life Long Learning in VET schools</p> <p><u>1) Upgrading of 11 VET schools into Schools of Excellence</u></p> <ul style="list-style-type: none"> - Selection of beneficiary VET schools - TA to PIU - School buildings repair work - Supply of VET training equipment - Introduction of IT - Equipping school seminar halls - Training of 40 unemployed for short-term employment in the repair works <p><u>2) Training of trainers</u></p> <ul style="list-style-type: none"> - Training of 200 school trainers per vocations from the beneficiary schools for introduction of innovative models of training - Training of 100 school trainers in IT skills - 7-day workshops for training in management of 40 school staff - 10-day workshops for re-training of 100 laid-off young teachers <p><u>3) Provision of initial and continuing vocational training in the "Schools of excellence"</u></p> <ul style="list-style-type: none"> - Training of part-time trainees in new skills within one year of VET schools upgrading - Development of 15 programs for the target group, aiming at the acquisition of basic skills <p>Component B :</p> <p>Ensuring Life Long Learning and Adaptability – (Grant Scheme)</p> <ul style="list-style-type: none"> - TA for Grant scheme management - Provision of on-the-job training to 2080 students and trainees - Development of up to 20 vocational training programs by VET schools and training providers - 10-day on-the-job training in enterprises of 	<ul style="list-style-type: none"> - Elaborated selection criteria - Framework Contract under PPF 2000 - Works and Supply contracts - Arrangement between LOs and beneficiary VET schools - Service contract and subcontracts with training institutions - Service Contract and arrangement between VET schools and LOs - Service Contract - Number of students/trainees 	<ul style="list-style-type: none"> - Properly identified labour market needs by the labour market studies - Availability of VET schools and school trainers willing to participate in the project - Availability of local enterprises and employers capable and willing to provide on-the-job training and to participate in the Grant scheme - Availability of unemployed youths motivated and willing to take part in short-courses training - Available support to the project activities by social partners and good cooperation with other organisations (universities, training institutions, employers associations, etc.) - Available experience with previous PHARE projects (UVET, Renovating Vocational Training Institute, Labour market Initiatives) - Available good relations between schools from different regions ensuring the possibility to replicate successful results

<p>120 school trainers on the use of new technologies and equipment</p> <p>- 100 factory trainers receiving pedagogical skills in 5-day training seminars</p>	<p>- Requests of employers/enterprises</p> <p>- VET schools/enterprises contracts for on the job training, development of programs</p> <p>- Number of Agreements between Enterprises and VET schools/tr. providers</p>	
<p>Preconditions</p> <p>- Successful implementation of Phare 2000 project;</p> <p>- Support of project by political bodies</p> <p>- 1 MoU signed between: MLSP-MES</p> <p>- PIU and PSC established by October 2002</p> <p>- PIU to be resourced adequately by MES for the whole project duration</p> <p>- Organisational problems relating to the project implementation</p> <p>- The course of restructuring the Bulgarian economy may lead to closing some enterprises</p>		