

## Multi-regional operational programme to combat discrimination of Spain, Bulgarian NAP inclusion and Operational Programme 'Human Resources Development'

Irena Dankova

Ministry of Labour and Social Policy of Bulgaria

Georgi Chopov

Club "Economika 2000"

### Brief description of the Bulgarian NAP on Social Inclusion (2006-2008) and the Operational Programme 'Human Resources Development' (2007-2013)

In September 2006 Bulgaria presented to the European Commission its first National Action Plan on Social Inclusion for the period 2006-2008 as part of the National Report on Strategies for Social Protection and Social Inclusion 2006-2008.

The NAP sets the key challenges, priority objectives and quantitative targets for the period of 2006-2008. The main policy objectives Bulgaria pursue through the implementation of the plan include:

1. Equal labour market participation of the groups at risk of poverty and social exclusion;
2. Ensuring equal access to services aiming at prevention of social exclusion and overcoming its consequences;
3. Social inclusion of the most vulnerable ethnic minorities;
4. Poverty reduction among the groups beyond working age (children and elderly).

In this paper, we will pay attention to two of the four policy objectives (1 and 3). The lack of employment appears to be one of the main causes for poverty and social exclusion. The analysis of the current situation in Bulgaria shows that although the unemployment rate is already less than 7 % (September 2007) and is close to the average of EU, there are still certain groups which face difficulties in access to labour market (long-term unemployed, young people, older workers, low-educated individuals and such without occupational specialization or profession, discouraged workers, people with disabilities, etc.). Moreover, the NAP identifies as a challenge the situation of vulnerable ethnic minorities, and particularly the Roma ethnic group. Additional efforts and measures according to the NAP are needed in order to address the problems of young Roma at the age up to 30 years as 80 % of them have never worked. It was found that one of the main reasons for the economic problems among the Roma community is the low level of vocational qualification which is due to low level of education and still existing discrimination attitudes among the majority towards Roma people. Furthermore, the self-initiative among Roma families is low and confirms the inherited culture of dependency, which further impedes the implementation of special programmes for development. The children of Roma origin forms the major part of the children who drop out of education. Another significant challenge regarding the Roma community in Bulgaria is the provision of accessible housing. In the BG NAP inclusion it is clearly said that the largest additional source of financing for the social inclusion of the vulnerable ethnic minorities besides the state budget will be the European Social Fund. In compliance with the requirement of Regulation 1081/2006 the "Human Resources Development" Operational Programme establishes

clear linkages between the National Strategic Report on Social Protection and Social Inclusion and the programme. The HRD OP reflects the targets and policy measures of the National Strategic Report on Social Protection and Social Inclusion that must be implemented during the OP period (2007-2013).

In this period Bulgaria for the first time is participating in the ESF through the 'Human Resources Development' Operational Programme which was recently approved by the European Commission. The HRD OP is a sectoral programme which is in compliance with the strategic priority for development of human resources. It shall support multi-regional and national initiatives in the field of employment, education and training, lifelong learning and social inclusion. As a part of the National Strategic Reference Framework, this Operational programme **aims at improving the quality of life through enhancing the human capital, achieving high levels of employment, increasing productivity, ensuring access to high-quality education and lifelong learning, and enhancing social inclusion.** The source of financing is the European Social Fund and the national budget.

With Council of Ministers' Decision No. 965 as of 16.12.2005, the "European Funds, International Programmes and Projects" Directorate General within the Ministry of Labour and Social Policy was designated as Managing Authority for HRD OP and it will be responsible for managing and implementing the operational programme efficiently and effectively. The HRD OP Managing Authority delegates with mutual Agreement to Intermediate Bodies certain tasks for managing certain priority axes or main areas of intervention. However, the Managing Authority retains the overall responsibility and is fully responsible for the efficient and effective management and implementation of the Operational Programme.

The following institutions are Intermediate Bodies for HRD OP:

- Employment Agency;
- Social Assistance Agency;
- Ministry of Education and Science.

The priority axes of the HRD OP are the following:

- Priority axis 1 - Promotion of economic activity and development of inclusive labour market;
- Priority axis 2 – Raising the productivity and adaptability of the employed persons;
- Priority axis 3 - Improving the quality of education and training in correspondence with the labour market needs for building a knowledge-based economy;
- Priority axis 4 - Improving the access to education and training;
- Priority axis 5 - Social inclusion and promotion of social economy;
- Priority axis 6 - Improving the efficiency of labour market institutions and of social and healthcare services;
- Priority axis 7- Transnational and interregional cooperation;
- Priority axis 8 - Technical assistance.

All priority axes of HRD OP will support the implementation of the policy objectives of NAP inclusion through targeted interventions in the following fields of action:

- Active inclusion through employment and professional qualification;
- Access to quality education and training;
- Development of social economy sector;

- Access to quality social and health services and deinstitutionalisation;
- Reduction of child poverty;
- Antidiscrimination.

## 1. Relevance of the Spanish OPCD to Bulgaria

Under the NAP inclusion 2006-2008, the Bulgarian Government is committed to implement an overall strategic approach towards the social inclusion of the most vulnerable groups. The NAP inclusion sets out 12 quantitative targets until 2008 and number of measures to address the difficulties faced by certain vulnerable groups in the field of employment, education, social support, access to social and healthcare services, income, and etc.

As mentioned above, the NAP inclusion is particularly devoted to measures towards reduction of poverty and social exclusion among vulnerable ethnic minorities. In line with this, a separate part of the HRD OP is devoted to the **'areas of assistance with regard to Roma community'** where special attention is paid to the main areas of intervention under the OP particularly linked to Roma community (1.1. Employment through development of entrepreneurship, 1.2. . Integration of vulnerable groups on the labour market, 4.1. Access to education and training for disadvantaged groups, 4.2. Children and youth in education and society, 4.3. Development of the life-long learning system, 5.1. Support to the social economy, 5.2. . Social services in support of labour market integration, 5.3. Employability through better health).

The Spanish OPCD supported beneficiaries such as immigrants, disabled persons, Roma population, other excluded or at risk of exclusion population groups (young single women with family responsibilities, young people who have dropped out of school early, unemployed individuals furthest from the labour market, the homeless, individuals in rehabilitation for drug-addiction, etc.), youths with judicial confinement measures. All of these groups may also benefit from the Bulgarian HRD OP for the period 2007-2013. Furthermore, the difficulties as outlined in the host country paper seem rather similar to the Bulgarian case especially when describing the main difficulties faced by people with disabilities, Roma community and other excluded groups.

The aspects of the Spanish OPCD which are relevant to Bulgaria include:

- The individual approach applied to 'each individual's situation and circumstances'. According to the Bulgarian Law on Social Assistance: 'Social assistance shall be based on social work by applying individual approach and valuation of the specific needs of the persons and families'. The social work in Bulgaria regarding unemployed people includes 'close co-ordination and complementarity between the social policies and access to employment measures' (Host country report, p.30).
- The working method of the operators. According to the Bulgarian legislation in the field of employment 'an individual action plan shall be drawn up for each registered unemployed person'. The services available to persons actively seeking a job include information about job vacancies announced; information about employment security and employment promotion programmes and measures; intermediation for furnishing information and placement; vocational information, consultation and guidance;

vocational and motivational training; inclusion in employment programmes and measures; study grant for training for attainment of vocational qualification;

- The OPCD has shown that the solution of social exclusion problems among people with disabilities, Roma and other excluded groups requires tailoring of specific and personalised measures in combination with support for subsidized employment; support for self-employment and starting up own businesses; protected employment as sheltered jobs, workplaces, vocational workshops, etc.; information, guidance and counselling services; provision of supporting social and labour integration services for rehabilitation and re-socialization; training and retraining activities; occupational vocational trainings and services.

### 1.1 Similarities/differences of the programme with the experience of Bulgaria

Bearing in mind that Bulgaria is a new member state of the European Union since the beginning of 2007 it is not possible to provide information on its experience concerning ESF funding. Bulgarian experience up to now was gained through the implementation of pre-accession programmes such as PHARE programme for example. In this sense, the similarities and differences between the OPCD and the Bulgaria's situation are rather conditional:

#### Similarities

- The approach with regard to the social inclusion activities in the structure of the both - Bulgarian and Spanish, programming documents seems quite similar although the Bulgarian OP HRD has specific priority axis 5 which is 'Social inclusion and promotion of social economy'.
- Another similarity arises from the general objectives of the Bulgarian and Spanish OP. The Bulgarian OP is aimed at improving the quality of life for people in Bulgaria through enhancing the human capital, achieving high levels of employment, increasing productivity, ensuring access to high-quality education and life-long learning, and enhancing social inclusion. The objective of the Operational Programme to Combat Discrimination is the socio-labour inclusion and access to employment of groups suffering discrimination in the labour market: women, immigrants and emigrants, the disabled, Romani people, prisoners and ex-prisoners, as well as other excluded groups. The objectives 1, 2 and 5 of the OPCD are similar to the priorities of the Bulgarian HRD OP.
- Both programmes have special focus on integration of Roma population;

## Differences

- Speaking about differences the most important is the sources of funding. The Spanish OP is presented as multi-funded because it receives funds from the European Social Fund (ESF) and the European Regional Development Fund (ERDF). The Bulgarian HRD OP is funded through ESF although there is a possibility for cross-financing of some priority axes up to a certain percentage (10-15%).
- Another difference is the fact that Spain has dedicated to the discrimination and its eradication a special OP, while in Bulgaria this policy problem is dissolved horizontally in the existing 6 priorities of the HRD OP (the fifth one – as it was already mentioned is the social inclusion). This is a difference in the problems' identification and priorities setting in the national social policy design.
- Another difference is with regard to the Intermediate Bodies of the OPs which in the Spanish case are a group of private NGOs which have managed part of that operational programme (the rest part is managed by public entities). In Bulgaria, only public entities are involved as managing actors. The representatives of the social partners participate only in the Monitoring committee. The NGOs act as implementing actors through realisation of specific projects financed by various grant schemes.

### 1.2 Potential transferability of the programme to Bulgaria

The OPCD has delivered very fruitful results in terms of actions which are targeted at the integration of groups at high risk of social exclusion such as Roma, people with disabilities and women. Namely for these particular vulnerable groups Bulgaria finds a potential for transferability of the programme which might be a model for social inclusion through **integrated approach** towards employment and professional qualification, quality education and training, and etc.

We think also that the **immigrants** will become one of the additional challenges for the Bulgarian social policy (this problem is still – more or less, in the periphery) and the Spanish experience under OPCD would be useful.

Another very powerful subject to be transferred into the Bulgarian social policy design is the applied active approach towards the Roma ethnic group, as well as the self-initiative as an important part of inclusion policies.

Not least, for Bulgaria of high importance will be the approach used for increase the awareness and non-discrimination attitudes of the employers and other players in this field.

### 1.3 Potential contribution of such a policy to the objectives and strategy of the Bulgarian National Strategy Reports on Social Protection and Social Inclusion

The NAP inclusion 2006-2008 outlines the new strategic approach with regard to the policy on social inclusion in Bulgaria. It is expected that this strategic approach will be further reinforced by the OP HRD which foresees indicative activities in the field of social inclusion. In particular, financing of the envisaged activities shall contribute to the achievement of the 12<sup>th</sup> quantitatively measurable results set down in the NAP inclusion (see section 1.5). Direct impact is expected to be achieved on the indicators for economic activity, employment and unemployment, for increasing the number of persons from vulnerable groups participating in vocational qualification programmes. Beyond the scope of quantitatively measurable indicators, but in accordance with the principles and objectives for better governance of the policy on social protection and social inclusion, HRD OP will also support activities aimed at: active inclusion of all stakeholders, raising the information of the community, better exchange of information and best practices, strengthening the capacity of both the administrative units and the socio-economic partners participating in the process of formation, implementation and evaluation of the social protection and social inclusion policy.

The above mentioned presents the current approach used in finding synergy between social inclusion agenda and the financial instruments available in Bulgaria. In respect to ESF funding so far this synergy is just in policy design. We think that the synergy is at the core of the OPCD and the programme provides great potential to explore further how to implement it in practice.

### 1.4 Key issues and main questions proposed for debate at the review meeting.

The papers for the PR meeting describe very well the results and way of functioning of the OPCD during the period 2000-2006. Therefore, the main questions are related to the practical implementation of the programme:

- Assessment of the impact (economic, social, policy) of the programme after the programming period ends – which methodology is more relevant? What periodicity? Internal or external assessment? Who will be the owner(s) of the results of the impact assessment?
- What are the expectations about the sustainability of the results and outcomes – which are the main risks ? What are possible copying strategies?
- What are the main strengths, weaknesses, opportunities and treats of the management and means of delivery of the OPCD (by civil society organizations through the mechanism of global grants)? What are necessary national (internal) conditions for introducing such approach?

## 1.5 Measure of success of policies in this field in Bulgaria

Regarding the NAP inclusion implementation the main instrument for measuring progress is preparing a report which contains detailed information on the achievement of the quantitative targets as set in the NAP, as well a quality evaluation of the implemented activities.

With regard to the monitoring and evaluation in May 2007 the Ministry of Labour and Social Policy collected information on the implemented measures and some of the results expected until 2008.

The key findings of the analysis include:

- Activity rate (15-64 age group) - 64.5 % (2008 goal - 65.6%)
- Unemployment rate - 8 % (2008 goal – under 9%)
- Employment rate (15-64 age group) - 58.6% (2008 goal – 59.2 %)
  - Employment rate among men - 62.8 %
  - Employment rate among women - 54.6 %
  - Employment rate among the 15-24 age group - 23.2 %
  - Employment rate among the 55-64 age group - 39.6 %
- Increase of the number of persons from vulnerable groups included in the programmes for vocational qualification - 21.2 % (2008 goal – increase by 20%);
- Decrease of the number of children living in specialised institutions - 11.5 %;
- Decrease of the total number of persons using social services in specialised institutions - 3.7 % (2008 goal –decrease by 10%);
- Increase of the number of users of community based social services – delegated by the state activity, as well as services “personal assistant” and “social assistant” financed by the state - 8.3 % (2008 goal increase by 20%);
- Increase of the number of children with special educational needs integrated into the mainstream and professional schools – more than twice (2008 goal – increase by 15 %);
- Increase of the number of schoolchildren of Roma origin brought out from segregated schools - 7.3 % (2008 goal – increase by 10%);
- Decrease of the number of persons and families receiving monthly social assistance benefits - 23.13 % (2008 goal -decrease of the number of persons dependent on social assistance by 5 %);
- Increase of the total income on an average per household - 8.1 % (2008 goal - at least 15 % increase in the total households' income).

In addition, concerning the implementation of the bulgarian HRD OP it is expected to measure progress on the basis of the indicators set in the programme, as well on the basis of the

indicators elaborated for each operation. The results will be incorporated in the annual and regularly reports to be discussed by the Monitoring Committee for the operational programme. It is envisaged that the impact of interventions targeted at the Roma community under the HRD OP will be evaluated with series of assessment studies. Monitoring of the progress will start with a specialized analytical study in the very beginning of OP's implementation. The progress related to the set of indicators related to the social inclusion Roma community will be reported regularly by the HRD OP Intermediate Bodies and through specialised purpose-oriented surveys.