



Graduate School of Development Studies

**Negotiating EU Integration in the Field of Education:
A Case Study of Bulgaria's Transformation in the Primary
Education**

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Iva Popova
(Bulgaria)

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Members of the examining committee:

Dr Thanh-Dam Truong (Supervisor)
Dr Karim Knio (Reader)

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Inquiries:

Postal address: Institute of Social Studies
 P.O. Box 29776
 2502 LT The Hague
 The Netherlands

Location: Kortenaerkade 12
 2518 AX The Hague
 The Netherlands

Telephone: +31 70 426 0460

Fax: +31 70 426 0799

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List of Acronyms

CNRS National Centre for Scientific Research

EC European Commission

EP European Parliament

EU European Union

NATO The North Atlantic Treaty Organisation

NAVET National Agency for Vocational
Education and Training

UN United Nations

WB World Bank

Relevance to Development Studies

Education is one of the most significant assets of every person. The subject of education is relevant in the Development studies, because in order for further achievements in the area to become reality, people need to have the proper knowledge and tools and to know how to implement them.

Keywords

Primary education, Bulgaria, European Union, EU integration, negotiations, hegemony

Chapter 1

Introduction, Research Questions and Background

‘It is the supreme art of the teacher to awaken joy in creative expression and knowledge.’¹

Albert Einstein

1.1 Introduction

The universal importance of education is a well-known and extensively explored, scientifically and practically proven fact. Its significance has been described in the literature through the ages and regardless of the constantly changing world order, values, norms, etc. there is one notion that practically remains the same – educated people are considered to have better chances for professional realization and higher social status. This generalization is definitely not valid for every different person and case, but is one of the strong beliefs that stimulate not only children, but also adults to constantly educate themselves in pursuit for better life. Moreover, the importance of education is also recognized and explored by most of the major world-wide organizations. Some important examples are: the United Nations (UN) and its Millennium Development Goal for Universal Education: ‘Ensure that by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary education’; the World Bank’s (WB) initiative ‘Education for all’; as well as the work of the ‘Education and Culture’ Directorate-General in the European Commission’s (EC), more specifically the Education & Training sub-division with the following objective: ‘In the field of education and training the mission of the European Commission is to reinforce and promote lifelong learning’, etc. Moreover, on the global governance arena, education is considered as one of the global public goods – the ones that are designated for everyone and are supposed to be accessible to them (Kaul et al., 1999)².

The case of the transformation in the primary education in the Republic of Bulgaria is in the focus of this research paper, placed in the framework of the European Union (EU) integration process in the country. There are several main reasons why primary education level is selected for this work. Because of the importance of the formation of the children’s mindset, as well as attitude towards the known and the unknown at this early age (primary education in Bulgaria embeds 1-4 grade in school when children are between 6/7 – 9/10 years old), being usually the first time when the children are

¹ <http://en.proverbia.net/citastema.asp?tematica=1197&page=1>

² Took from an essay presented in July 2012 for the course Global Governance at ISS

exposed to outside the family influences and having the task to learn how to behave and succeed in the ‘real world’ (the author is not undermining the kinder gardens level of education, but in the case of Bulgaria, it is not obligatory and a lot of parents do not use their services). Also, because of the author’s personal belief that a strong and competent primary education is a necessary foundation for future success and is fundamental for children’s development. Last but not least, primary education in Bulgaria is usually staying on the sides compared to higher and university level education, therefore its specificities need further analysis.

This transformation of the education system in the country, with an emphasis on primary education will be placed under the EU integration negotiation processes and power relations between Bulgaria and the Union will be explored.

1.2 Research questions:

- Is there a gap between the EU education policies and their proper implementation in Bulgarian educational system – the case of primary education?
- How the Education chapter was negotiated during the pre-accession period and what are the challenges in front of the primary education in Bulgaria five years after joining the EU?
- How can the power relations between Bulgaria and the EU be explained in the case of education and?

1.3 Background

Historical framework

General history

The history of Bulgaria in the 20th century, apart from the wars in which the country took part in the first half on the century (the Balkan wars, the first and second World wars), is mostly bounded to the communist past of the country. Bulgaria was ruled under a totalitarian communist regime for a total of 45 years (1944 – 1989).

The communist regime attempted to control and regulate all conflicts in the name of creating a “harmonious” and classless society. It tried to eliminate old cleavages and by forcefully transforming the economy from a market to a

planned one, eliminating all alternate forms of property on the basis of private ownership. By subduing any autonomous “civil society” it tried to eliminate all form of independent activity of social, political and professional groups – in other words, all potential forms of resistance to the encompassing power of the party-state. (Karasimeonov, 1999)

Bulgarian history and social science scholars describe and analyze the regime as completely Soviet dominated with almost no access to other foreign influences. All the major economic relations (both imports and exports) of the country were predominantly oriented towards the Soviet bloc countries and nearly no other philosophical or cultural trends reached the common people, except the ones coming from the ‘Big brother’, as the Union was label in the described historical and conceptual framework. People were exposed to free education and healthcare, but were living with limited alternatives to handle their own lives.

According to the author of this research paper – practically, the complete lack of choice and freedom of speech in addition to the inability to travel, live, work or study abroad can be considered some of the worst realities during this regime. Bulgarians who were contemporary of the communist rule in the country, supported also by the history books give interesting, but also inexplicable details, given the existing understanding of democracy with all its advantages and disadvantages. The stories of free-minded people oppressed by the regime, as well as the violence of the members of the elite and the State Security are still a very intriguing topic, widely discussed even 23 years after the beginning of the democratic rule in the present history of Bulgaria. What I find remarkable as far as people’s opinions on the communist rule in the country are concerned, are the following two features: the first one is the fact that everyone in Bulgaria has his/her own, specific view on the topic, no matter of age, social status and political beliefs; and the second one is that those opinions are in most cases quite to the extremes – either complete approval and nostalgia of the old status quo or absolute denial and conviction of the regime. It would be hard to find an indifferent individual on the subject or someone who does not have a strong opinion and gravitates in the middle grey area. This phenomenon is interesting to be observed and is a vivid example of the how the same thing is perceived completely different by different actors, given the specific environment and circumstances, which form the opinion.

Education system (1944-1989)

As far as education during the communist rule was concerned, it was free for everyone as already mentioned above. The renowned history prof. Rumiana Marinova-Christidi (2010) devoted her research on the specificities of the education at that time and in the following part of the research I will present her findings. It was considered one of the highest priorities of the government to form an educated population: “The ruling elite perceived [the education] as one of the major instruments for putting through specific ideas about the

future, in the mindset of the society, with a focus on the young generation.' Therefore, during that historical period, education, science and research were very systematically supported and the area developed positively. Since 1944, the Ministry of National Education devoted its professional efforts into building a strong educational system and formed three divisions that focused on the particular level of education – pre-primary and primary; secondary and institute and university. The reorganizations of the teaching community were inevitable and a lot of school and university teachers, education inspectors, etc. were fired with the accusation of expressing political incorrect opinions. Prof. Marinova-Christidi continued with exploring some other specificities of the system, such as the fact that the principals of all 135 secondary schools in the country were replaced with 'suitable' people. Also many new secondary schools were open and due to the previously mentioned dismissals, there was a serious lack of teaching staff. The ruling party solved this issue by lowering the criteria for acquiring teaching qualification, which led to lower level of teaching in the newly open schools. It is not surprising that the teachers supporting the party enjoyed privileges in being appointed and they expressed their gratitude with teaching the 'proper' lessons in class, by skipping some parts of the history for being inconvenient. Another measure that was introduced on 12 February 1945 was the simplified orthography, similar to the 'agricultural', which allowed more people to enjoy the benefits of education. In December 1947 the Sixth Great National Assembly voted the new Constitution, where the compulsory and free primary education was reaffirmed and the students from the minorities were allowed to study the material in their own language, in addition to the obligatory subject of Bulgarian language. The Marx-Lenin ideology was entirely introduced in the education system in 1947, when prof. Kiril Dramaliev became Minister of Education. The Central State Archive contains the following statement of Valko Chervenkov (Secretary of the Bulgarian Communist Party) delivered at the V Congress of the party in 1948:

'The major task of our party on the ideological arena in the current historical moment is to organize and conduct successive, persistent, with no hesitation, determined overcoming of the capitalist ideology in all its variations, leaning on the brilliant progress of the Soviet socialist science and culture, learning from and being guided by it, in order to ensure – along with the reformation of our country into socialist one – complete supremacy of the creative and combatant Marx-Lenin ideology in all spheres of science, art and culture'.

This statement demonstrates the purposefulness of the party and its complete confidence and clear objectives concerning the future of the country. Gradually the Central Bureau of the party took over all the power and became the sole decision-maker, leaving the ministries and the other state actors with no decision-power, hence transformed the system in such a way that there was no sanction function to the party verdicts. It is not surprising that in the following years practically all subjects and methods of teaching were referring to the communist ideals which in a way deprived the students from knowledge and information on the other opinions and doctrines. The life of the people from school to work and family was accompanied with particular ideas, which had to be supported and accepted as undeniable. The ones, who were thinking

differently and presumed to express their beliefs and opinions, were in most cases punished and censored.

Another measure presented by prof. Marinova-Christidi was the closure of all foreign schools in the country – namely: all the primary schools; all the German schools; seven French, one American, one Austrian, one Italian and one Romanian high schools were no longer operating. This step can be interpreted as prevention from exposure of children to a foreign influence, different from the Soviet one. Of course this step resulted in bad consequences like lack of people with good foreign language skills, which could easily be detected from the difficulties of state official in communicating with foreign economic partners. Therefore, along with the compulsory Russian language, English was also promoted in regular school in order to correct the formed problem. The author described further the outside-the-classroom life of students which was also guided by the party. Children were gathered in cooperative groups where they were disciplined in love for the party, the nation, the labour, and the collective success. All the extra-curricular activities were organized in a specific way, so that concrete ideas to be promoted and certain beliefs to become familiar to the children. Step by step the whole structure of the education process in Bulgaria became a strict follower of the Soviet system with the material in the textbooks, organization of the classes, the duration of the school year, the style of writing, the award procedure for excellent students, etc.

Prof. Marinova-Christidi also observed some the very positive changes that occurred in the area during that period – the better condition of the school buildings – classrooms, common rooms, sports area, etc.; better institutes for educating future teachers; new professional schools and schools for the minority children (mainly Turkish, but also Jewish and Armenian) were open. Another huge campaign carried through the whole country was the dealing with promoting literacy among the population, by conducting literacy courses – static or travelling. The campaign was declared a huge success and the results were impressive – for the period of less than 10 years around half a million illiterate people were educated and the percentage of illiteracy among the population of below 50 years old was almost zero.

In 1954 at the following VI Congress of the party changed the education course towards a more practical area. The aim was to stimulate children to choose to start working right after graduating from school, in the labour force – in the manufacture and agriculture, instead of continuing their education at the university level. The author also commented on the controversial outcome for the system caused by the desire to copy the Soviet model. The conclusions that were drawn resulted in opening the school system towards innovation and moving back to some of the working traditional Bulgarian education practices. The science education was very tolerated in the 1950s and numerous science labs, technical courses, etc. were popularized among the students. In the following decades the school programmes changed several times, as labor education was introduced and a better connection of the studies with the real life experience tried to be established. In 1969 Todor Jivkov (the First Secretary and afterward the General Secretary of the party, 35 years the head of

the country) set the following task to the party:

'Forming high-qualified professionals of a new type, capable of dealing with complicated cases, placed by the science-technical revolution and development of the country; forming of creative personalities, capable of thinking by themselves, to orient and to solve the required tasks, to resolve possible contradictions; workers, not only high-qualified and creative thinking, but also raised in the communist spirit, loyal to the party, and actively fighting for re-creation of the party politics in life'.

One can notice the serious change in the politics towards education – from promoting collective action and no difference between the students, to supporting creativity and problem-solving. Of course both approaches were conducted in the Communist spirit and under serious supervision, but the notion of change was already coming and continued to develop in the following decades. According to Popov (2001), cited by Marinova-Christidi in 1970 the total number of schools (primary, secondary, technical and art) was 3845 with 44 545 teachers and 902 059 students. The system continued with the changes and in 1986 the children of active fighters, workers and agriculture staff were deprived from their privileges to enter easily elite high schools and universities. The last planned education congress in 1989 under the communist rule did not happen due to the democratization process that started at the same time.

Education system after the transition to democracy (post 1989)

After the new rule was established in the country not only the political, economic and social areas changed significantly, but also the structure of the education system in Bulgaria. The following part of the research paper will deal with introducing those changes based on the work of Julia Savova (1996). First, the author focused on the changes in the secondary education as she grouped them in five categories: legislative provisions, educational structure, curriculum, Financing and management and Educational staff. In all categories significant changes had been implemented like new Law for Education, different types of schools were created, the introduction of the private schools, which were a completely new concept, etc. Savova continued her article with differentiating the changes in the educational curricula and place on the foreground the following eight:

1. Changes in the curriculum for primary schools brought about by the structural reorganisation of primary education.
2. Reassessment of the existing curricula for the comprehensive, basic and secondary schools, and for the vocational schools, and the design of new educational requirement packages.
3. A revision of the vocational schools curricula was made in 1990 and projects to design new ones initiated.
4. There have been changes in the school document packages allowing for knowledge of economics as part of the general curriculum as well as part of

vocational training.

5. Attempts were made in practice to eliminate the ideology present in syllabuses and textbooks before 1989.
6. Introducing new subjects. A new development is the choice of foreign language to be studied among the six major European languages.
7. Several concurrent changes in the system of textbook development have been made, moving from the stage of subjective choice of the textbook-writers team and preliminary assignment and financing of textbook writing, towards inviting textbook tenders from publishers.
8. Successful steps are being made towards harmonizing syllabuses in different general education subjects with European standards.'

All these changes show the positive attitude of the ruling parties towards modernization and show their understanding that the change is necessary and desired. All 8 changes concerning the curricula distinguished by Savova expressed Bulgaria's strong will and dedication to transform the education system, so that it resembles the models of the Western European countries. These were the first steps of the country in the education area, towards becoming part of the EU family.

Savova also touched upon the funding in the system, which had always been a problematic issue when education is concerned. The author mentioned the variety of sources (the Ministry of Education, as well as the Municipalities budgets) and stressed on the fact that the funding was insufficient at that time. This fact is not surprising having in mind that all state funded areas are always suffering and complaining for the lack of adequate funding. There has been a trend in the education system to receive more funds from the State budget each year, and there is always room for complaints and discontent. The author touched upon the problems of the teachers and educators as well, being mainly their proper training and the lack of opportunities to constantly raise their skills, abilities and qualifications. Savova's conclusion outlined the difficulties of the transition to democracy period for Bulgaria and put foreground the principle of 'Learning by doing', with which she tried to demonstrate which was the correct path the country had to follow, in order to manage through the transition period.

On the way to joining the European Union

Bulgaria joined the European Union on 1st January 2007. The accession happened 19 years after the country established its first diplomatic relations with the European Economic Community (1988) and thirteen years after Bulgarian's Parliament first official expression of willingness to join the EU (1994). Joining the union, even under certain conditions, was considered an immense success from the perspective of a country which experienced a communist regime for the prolonged period of 45 years.

During the pre-accession period up until the signing of the Accession Treaty (2000-2005) Bulgaria changed two governments – the first (1997-2001) was ruled by the Union of Democratic forces (center-right party) with Ivan Kostov as Prime Minister, and the second (2001-2005) was ruled by the National Movement Simeon II (liberal party) with Simeon Saxe-Coburg Gotha as Prime Minister.

Ivan Kostov was the first Prime Minister in the new history of the country who remained at his position for the complete mandate of 4 years. His government remained in the history mostly with its attempts to stabilize the economic conditions in the country after the severe instability from the previous years. The measures and instruments that were introduced were the currency board and the privatization of state owned enterprises. At the end of the 20th century, the economic growth in the country became reality.

Simeon Saxe-Coburg Gotha was the first Prime Minister in Bulgaria that is part of the Bulgarian royal family. If the country had remained a Monarchy, he would have been its tzar (king). His government was also famous for its successful economic measures, higher percentage of trust in the stability of the country, which led to record levels of foreign direct investments in the country. On the political area, this government was famous for the accession in the North Atlantic Treaty Organization (NATO) in 2004, as well as signing the Accession Treaty for joining the EU (2005).

These were the two governments that were considered the major players who carried out some of the most difficult and unpopular reforms and led the country to the 'elite club' of Europe.

There were numerous controversial opinions on this success on two levels – on the international one outside the country and on domestic one: from the politicians and from the citizens themselves. The comments varied from absolute approval and expression of the notion that joining the EU was Bulgaria's only right choice for further development, to complete objection due to euroscepticism towards the whole EU project or critique of the level of readiness of the country to join due to insufficient reforms and inability to compete with the strong European states. 'The decision for Romania's and Bulgaria's accession was more strategic, more geopolitical in a sense. It was better to have these countries on board and influence them in this new capacity, rather than letting them become festering wounds, in the context of the problems of the Western Balkans, which would have contaminated a whole region.' – this statement given by François Frison-Roche from the National Centre for Scientific Research (CNRS) can be considered as the diplomatic opinion of the EU officials on the accession of Bulgaria and Romania, five years later.

Today, after more than twenty years of democratic rule and five years since Bulgaria joined the EU, the country has accomplished a considerable success in its development, but there are some areas which continue to be significantly problematic – the judicial reform and the fight against corruption and organized crime (European Commission Report, 2012), healthcare,

education, pensions, low levels of income. These are the major areas which Bulgaria is trying to work for improvement with sporadic success and under the conditions of the financial crisis.

Chapter 2 EU Accession policies

2.1 General Overview

In order for a country to be eligible for membership in the EU it has to fulfill certain criteria. They were outlined in 1993 and are known as 'Copenhagen criteria'. Any country that wishes to join has to demonstrate the following:

1. Stable institutions guaranteeing democracy, the rule of law, human rights and respect for and protection of minorities (the political criterion)
2. A functioning market economy and the capacity to cope with competition and market forces in the EU (the economic criterion)
3. The ability to take on and implement effectively the obligations of membership, including adherence to the aims of political, economic and monetary union (the criterion presupposing the ability to incorporate the entire body of laws and regulations of the EU – the 'acquis communautaire')

(EC Enlargement Directorate General)

It is important to note that the Council takes the decision on accession, referring to the EC and only after a sanction from the European Parliament (EP). Therefore, even if a country meets the above described criteria, it might still not be approved for accession.

The Acquis Communautaire concerning the enlargement policy of the EU consists of 35 chapters in various policy areas (the chapters were 31 when Bulgaria was in the process of negotiating its place in the union), which also have to be 'closed' (the rules described in them have to be followed and cannot be negotiated in order for an accession to be possible).

Additional issues that the countries and the EC have to arrange are the financial parameters – 'such as how much the new member is likely to pay into and receive from the EU budget (in the form of transfers)' and the transitional issues – 'sometimes certain rules are phased in gradually, to give the new member or existing members time to adapt' (EC Enlargement Directorate General).

A regular monitoring on the applicant countries is executed by the Commission which aims at further advising on meeting the accession criteria, by providing regular reports.

2.2 Acquis Communautaire chapter on Education and Training³

The Education and Training are presented in the Acquis policies under the chapter 18. The following part of the paper will present the main aspects of the rules in the area, which are described in EC's Guide to Negotiations (2004). 'The Community's *acquis* consists of a 1977 Directive (education of the children of migrant workers), action programmes and Conclusions, Resolutions or Declarations of the Council or the Council and the Ministers of Education meeting within the Council on various issues (e.g. equality of opportunity, illiteracy, safety in schools, facilities for minorities, etc.)' (EC, 2004). There are also two supportive bodies that help the development in the education field – they are the European Center for the Development of Vocational Training and the European Training Foundation. One of the very central Directives of the chapter is the one 'on the education of children of migrant workers' and all member states have to make sure that is implemented and followed, at latest 'by the time of their accession'. The term children of migrant workers 'applies to children for whom school attendance is compulsory under the laws of the host State, who are dependants of any worker who is a national of another Member State, where such children are resident in the territory of the Member State in which that national carries on or has carried on an activity as an employed person' (*ibid*). The member state has to guarantee that such children are offered free education, and that all measures are taken for the proper education (according to the standards and the needs of the children – studies need to be conducted in the 'official' language of the host state, but also if it's necessary in the children's mother language as well). As far as Bulgaria is concerned, the chapter was opened in the first half of 2000; then provisionally closed in May 2000; and completely closed in December 2004. The EU did not place any transitional arrangements to the country in this area.

2.3 EU evaluation of the Bulgaria progress towards accession, in the Education area (1998-2005)

The Commission prepared 8 regular progress reports on Bulgaria in the 1998-2005 pre-accession period. The conclusions in 6 of them always covered the following:

- describes the relations between Bulgaria and the Union, particularly in the framework of the Europe Agreement

³ The author of the paper is using the old heading of the chapter, due to the fact that Bulgaria was in the accession period, while the old naming was present.

- analyses the situation in respect of the political conditions set by the European Council (democracy, rule of law, human rights, protection of minorities)
- assesses Bulgaria's situation and prospects in respect of the economic conditions mentioned by the European Council (functioning market economy, capacity to cope with competitive pressures and market forces within the Union)
- addresses the question of Bulgaria's capacity to adopt the obligations of membership, that is, the *acquis* of the Union as expressed in the Treaty, the secondary legislation and the policies of the Union

(European Commission, 1998-2005)

The judicial and administrative capacities are also evaluated in the yearly report, 'so as to guarantee the harmonious implementation of Community policies after membership'.

In the following part, the author will compare by years the progress of the country, as far as education is concerned and the Commission's conclusions. The Education, Training and Youth is located under the Innovation section in the report and is part of the Ability to assume the obligations of membership chapter for the years 1998-1999 and was assessed separately as an Education and Training chapter of the *Acquis* for the years 2000-2005.

1. Regular report on progress (1998, p.24)

- Willingness of the country to reform the education system (unification of autonomous universities, budget and management reorganization), by applying EU practices (The Higher Education Act – 1995)
- Accomplishments: the establishment of a National Agency on Assessments and Accreditation and amendments to the National Education Act (1998); draft of a National Education Strategy an Information and Communication Technologies, as well as a national concept for vocational education and training; approval of a framework of the National programme for adult education
- EU Programmes 'Youth for Europe', 'Socrates' and 'Leonardo' will start to function in Bulgaria from 1 January 1999
- Conclusion for the section: 'There has been progress in telecommunications and education. However significant efforts are still needed in the audio-visual sector'.

2. Regular report on progress (1999, p.32)

- Act on Educational levels and the curriculum was introduced

- New Higher Education Law was amended
- New Vocational Education and Training act was adopted
- Promotion of cooperation between the country and the EU through Tempus (a scheme that ‘supports the modernisation of higher education and creates an area of co-operation in countries surrounding the EU’)
- ‘Youth for Europe’, ‘Socrates’ and ‘Leonardo’ already function in the country
- ‘The policy development capacity of the Ministry of Education and Science and needs to be reinforced and the capacity of the administration to implement new legislation should be further developed’
- Recommendation for further decentralization and deconcentration (with a priority of the financial management of schools)
- 98 students participated in the Erasmus mobility programme and were given grants to fulfill their studies in EU member states (1998-1999)
- 1 300 people participated in the ‘Youth for Europe’ programme
- Conclusion for the section: ‘There has been progress in all sectors which indicates that for the information society, research and technological development, education and audiovisual fields, Bulgaria should have little difficulty in taking on the *acquis*’.

3. Regular report on progress (2000, pp.66-67)

- Bulgaria was granted participation in the second phase of ‘Socrates’ and the ‘Leonardo da Vinci’ programmes (2000-2006)
- Preparations for participation in the new ‘Youth’ programme, which incorporates European Voluntary Service activities
- ‘The Education Degree, General Minimum Education and Curriculum Act (1999) and National Education Act (1998) addressed for the first time the question of education of children of migrant workers, in order to comply with the EU Directive in the issue (studying in the mother tongue and exploring the characteristics of the country of origin)
- Non-discrimination towards EU citizens in the education field – ensured by the amendments to the Higher Education Act; ‘foreigners can now apply to study in higher education establishments if they have diplomas that would entitle them to access to higher education in the country where they acquired their diploma’; higher fees to EU citizens are not covered
- Progress towards European standards is observed; these standards are monitored by the National Agency for Vocational Education and Training (NAVET), which unfortunately is facing particular problems in the area of financing and human resource capacity
- Overall assessment: satisfactory participation in the Community programs; implementation on ‘the Directive for the education of children of migrant workers had to be ensured’; the current training infrastructure was comparatively fine, but the coherent continuing training policy was still absent; the administrative capacity of the Ministry of Education and Science had to be

strengthened, so that further decentralization to the regions was achieved; 'the co-operation between the Ministry of Labour and Social Policy and the Ministry for Education and Science still needs to be improved'; the link between the needs of the market and the skills attained in the vocational schools needed to be established; further steps needed to be taken on improving the flexible system of vocational education and rising of the teacher's qualifications; further policy measures had to be taken on the problem with early school drops. On the whole, Bulgaria has achieved considerable progress so far, but efforts to further reform the sector and to substantially increase financial support need to be undertaken.

4. Regular report on progress (2001, pp.70-71)

- Bulgaria participated in the second generation of the Community programmes 'Leonardo da Vinci' and 'Socrates'
- Procedures for participation in the new Youth programme were underway'
- No development on the issue of the Directive concerning education of children of migrant workers could be detached
- Small progress could be reported on the issue of implementation of European standards in the education and training system
- State requirements were introduced concerning the proper education and qualification of teachers; and also for further decentralization on the issue of admission students to general secondary schools
- New vocations on the curricula reform were introduced by the NAVET and approved by the Ministry of Education and Science
- 'A number of criteria and specific procedures for licensing have been worked out for vocational education and training, as well as national educational programmes for children (September 2000) and young people (September 2001)'
- Equal access to higher education was addressed by specific measures
- Overall assessment: satisfactory participation in the Community programs and proper functioning of the established national agencies; but on the other hand better connection between the Ministry of Education and Science and the National Agency for Socrates was needed; 'the Directive concerning the education of children of migrant workers still has to be fully transposed and implementation ensured'; no significant progress in the implementation of the comprehensive reform of the vocational educational and training system; 'no clear strategy for and linkage between the planned optimisation and decentralisation of the vocational education and training system'; more significant priority had to be given to the reform of the teacher's obtaining higher qualifications; insignificant cooperation between schools and private companies; 'investment in active labour market measures, including workforce participation in continuing training, needs to be further enhanced'; social partners involvement in the vocational education and training issues remained scares; NAVET lacked human and financial resources and better

collaboration with the Ministry of Education and Science was required; ‘Co-operation between enterprises, universities, the Ministry and social partners needs to be further enhanced to overcome the existing (partial) skills mismatch in the area of higher education’; ‘The current system of institutional evaluation and accreditation lacked transparency’.

5. Regular report on progress (2002, pp.94-96)

- Bulgaria continued to participate in the second generation of the Community programmes ‘Leonardo da Vinci’ and ‘Socrates’; the National Agencies for both Socrates and Leonardo da Vinci were located in the Human Resource Development Centre (December 2001)
- ‘Bulgaria started to participate in the new Youth programme in October 2001’
- No development on the issue of the Directive concerning education of children of migrant workers could be detached
- Small progress was made with the reformation of the education and training system – ‘A Law on Employment Promotion entered into force in January 2002’ – it aimed at motivating employers to hire and instruct unemployed people, who participated in the vocational education and training, also it dealt with the regulation of the licensing procedure of training providers, being supervised by the NAVET now
- ‘New implementing legislation dealing with entry to general education and procedures for approval and dissemination of textbooks has also been adopted’
- The issue of limited coordination and monitoring, and the lack of financing in the secondary school system was addressed with the adoption of the implemented legislation for the Public Education Act of January 2002.
- In order for consent with the new curricula for vocational education to be fulfilled, a fifth year for all professional schools was supplemented, and new programmes for 9th, 10th and 11th classes were introduced
- NAVET licensed 14 new centers for vocational education and training and offered general state requirements for several professions
- The Ministry participated in the consultation meetings on the European Commission’s Memorandum on Lifelong Learning
- Overall assessment: satisfactory participation in the Community programs; further efforts needed to be put as far as the financial liabilities towards those programs and their management were concerned; the operational dimension of the existing National Agencies needed further development; the Directive concerning education of children of migrant workers needed to be surely implemented; ‘Most of the recommendations in the last Regular Report on the education and training system are still valid. For example, it is still necessary to further develop the vocational education and training system at regional level, to ensure co-operation between companies and schools and to invest in active labour market measures’; the discrepancy between the vocational education and training was still an issue; better response to the need of the market needed to be provided by proper training;

the capacity of NAVET needed to be increased; further reforms need to be executed in the teacher and vocational training; ‘Cooperation between the Ministry of Education and Science and the Ministry of Labour and Social Policy needs to be strengthened, particularly in the area of vocational counseling’; the Commission pointed out as that ‘ensure[ing] the best possible network of secondary schools, including adjusting the number of schools and teachers in line with [the] demographic developments’ would be a significant challenge.

- Conclusion:

In its 1997 Opinion, the Commission concluded that, in the perspective of accession, no major problems should be expected in these fields. Since the Opinion, the process of bringing Bulgaria’s legislation and structures into line with the *acquis* has generally developed satisfactorily. Negotiations in this chapter have been provisionally closed. Bulgaria has not requested any transitional arrangements in this area. Bulgaria is generally meeting the commitments it has made in the accession negotiations in this field. Bulgaria should focus further efforts on improvement of the financial management of its participation in the Community programmes, better co-ordination between all the bodies involved, effective implementation of the Directive concerning education of children of migrant workers and on a comprehensive reform of the vocational education and training system to ensure that it is flexible and can adapt in line with the needs of the labour market. (European Commission, 2002, p. 96)

6. Regular report on progress (2003, pp.86-88)

- Bulgaria continued to participate in the second generation of the Community programmes ‘Leonardo da Vinci’, ‘Socrates’ and ‘Youth’
- The implementation program for the directive concerning education of children of migrant workers was endorsed (proper education in the mother tongue, as well as in Bulgarian, and also culture training)
- Small progress was achieved with the reformation of the education and training system
- ‘The National Action Plan on Employment 2003...outlines key employment actions, including training for adults leading to acquisition of vocational qualifications’
- 12 new standards were accepted
- Meetings between employers and professional organizations were held, which initiated a change in the list of professions covered by vocational education and training, so that the needs of the market was covered
- New amendments were adopted which were dealing with state-recognized vocational qualifications
- ‘A National Action Plan on Employment was approved by the Council of Ministers in April 2003. It outlines the key employment actions for 2003, including training for adults leading to the acquisition of a vocational qualification as a substantial part of the active measures.’
- The State Agency for Youth and Sports was transformed into a

Ministry

- Overall assessment: satisfactory participation in the Community programs; the financial question on the programs needs to be further resolved; implementation on 'the Directive for the education of children of migrant workers had to be ensured'; 'investment in education measured as a share in GDP is still below the EU average'; the problem of drop-outs, early school leavers and school failure was significant; 'Enrolment in higher education is relatively low'; the question of the mismatch of the needs of the market, and the required skills in schools was still an issue; vocational education needed to be further developed in order to respond to the economic needs; 'the inequality of access to training for the unemployed has to be addressed with high priority'; 'Efforts to improve the provision of education for minority groups and review possible obstacles to ensure equal access to education should be accelerated'.
- Conclusion: Some progress has been noticed and 'Bulgarian legislation is generally in line with the *acquis*'; the country is completely involved in the second generation of the Community Programmes; further work have to be conducted on the question of operational capacity of the National Agencies; also the financial obligations towards the Community programs needed to be met more precisely; 'Negotiations on this chapter have been provisionally concluded. Bulgaria has not requested any transitional arrangements in this area. Bulgaria is generally meeting the commitments and requirements arising from the accession negotiations in this field.'

Chapter 3 Bulgarian Education system⁴

3.1 Overview

Bulgarian education system consists of four forms of training – kinder gardens, schools, universities and supporting units. All citizens have the right to education, it is secular and free in the state and municipality schools. Education is obligatory until 16 years of age and it usually starts at the age of 7. There are exceptions, when a child can start going to school at the age of 6. The official language is Bulgarian, and there is an option for the students who do not have Bulgarian as mother tongue, they are given the opportunity to study their mother tongue language, as well. The grading system is between 2 (poor) and 6 (excellent).

The structure of the different levels of education is the following:

- Kinder gardens – consist of two levels: 3-5 years old children and pre-school (mandatory level) – 5-7 years old children.
- Schools – according to the level, the school education is primary, secondary and high, and according to the content it is general or vocational. Primary schools comprise I-IV grades, secondary schools consist of V-VIII, and high schools are from IX-XII grades. The total number of years in school is in most cases 12 years, and the school cycle ends with States exams (2 of them, one of which is compulsory – Bulgarian language and Literature and the other one is according to the student's choice). There are seven forms of education – daily, evening, default, correspondent, individual, independent and remote.
- Universities – the university level of education has 4 different varieties of schools – research oriented, creative oriented, sports oriented or health oriented. They also differentiate between state and private. The possible levels of achievement are – bachelor's, master's and PhD. There are also possibilities for a student to take part in specializations, which are not given a degree.

⁴http://www.mon.bg/opencms/export/sites/mon/left_menu/documents/law/zkn_prosveta.pdf (The Law on National Education)
http://www.minedu.government.bg/opencms/export/sites/mon/left_menu/documents/law/zkn_vo.pdf (The Law on Higher Education)
http://www.minedu.government.bg/top_menu/general/educational_programs/
(Ministry of Education)

3.2 Primary education (curriculum)

The curriculum in Ist grade is the following:

1. Bulgarian language and Literature
2. Mathematics
3. Native land
4. Music
5. Fine Arts
6. Manners and Techniques
7. Sports
8. Information technologies (Compulsory selected course)

The curriculum in IInd grade is the following:

1. Bulgarian Language and Literature
2. Mathematics
3. Surrounding world
4. Music
5. Fine Arts
6. Manners and Techniques
7. Sports
8. Information technologies (Compulsory selected course)
9. One/two of the following languages: English
10. German
11. French
12. Spanish
13. Italian
14. Russian
15. Mother tongue – Armenian (Compulsory selected course)
16. Mother tongue – Hebrew (Compulsory selected course)
17. Mother tongue – Turkish (Compulsory selected course)
18. Mother tongue – Roma language (Compulsory selected course)

The curriculum in IIIrd and IVth grades:

1. Bulgarian Language and Literature
2. Mathematics
3. The person and the society
4. The person and the nature
5. Music
6. Fine Arts
7. Manners and Techniques
8. Sports

9. Information technologies (Compulsory selected course)
10. One/two of the following languages: English
11. German
12. French
13. Spanish
14. Italian
15. Russian
16. Mother tongue – Armenian (Compulsory selected course)
17. Mother tongue – Hebrew (Compulsory selected course)
18. Mother tongue – Turkish (Compulsory selected course)
19. Mother tongue – Roma language (Compulsory selected course)

3.3 Education reform in Bulgaria⁵

The reform in the Bulgarian education system is taking place in the last over twenty years – during the new democratic history of the country. Education is set as one of the major priorities of the country and holds a significant role in the National Reform Programme (2011-2015) In Implementation of ‘Europe 2020’ Strategy (pp. 32-33). The priorities in the area of education set in the document are the following:

- Improving the quality of education
- Linking the curricula to actual needs of the economy
- Ensuring equal access to education and opening the educational system
- Creating the preconditions for practical implementation of the Lifelong Learning concept
- Involving young people in the elaboration of sectoral policies
- Transforming Bulgaria into a knowledge and innovation-based economy.

These objectives, although very inspirational and strictly corresponding to ‘Europe 2020’ Strategy, appear to be too broad and general at the same time. It seems that the serious problems in the system and the reform itself are being marginalized and not addressed completely. The Reform Program also elaborates on the support which the country will receive from the World Bank, concerning the ‘institutional reforms’, as well as the financing part of the reform.

The latest report of UNICEF on the education system in the country brings forward the following reforms that had been carried out in Bulgaria

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during the last five years (p.1):

- Project on preventing early school dropouts
- Introduction of three pillar system for differentiated payments of teachers, based on their performance (2008)
- Introduction of a delegated budget funding of the schools
- Measures for improving the access to education (examples: free text books for 1-7 grade students, school meals, transportation, etc.)
- Policy for optimization of the school network – closing of several small schools
- Introduction of state matriculation exams for secondary education (2008)

These reforms can be considered as a success, but they only lay the foundations for further development in the area of education. As UNICEF's report promptly pointed out, these reforms have not solved out yet the major problems like: early dropout of school, the minority issues (excludability of the ethnic minorities – mostly Roma children) and not meeting EU school performance benchmarks (2010).

3.4 National Program for Development of School Education and Pre-School Education and Training (2006-2015)

The program placed the child as the most essential element in the education system and emphasized the importance of equal access to quality education to all the children. This aim overlaps of with the Millennium Development Goal for accessible primary education to all children.

The program formulated 8 major problem of the education system in Bulgaria:

1. Orientation of the system towards memorizing and repeating, instead of provoking thinking, independence and developing skills – this was considered by the policy-makers a problem with history, which dated back in the Communist period of the country. It prevented children to showing their abilities and creative problem-solving. 'The old stereotype of the teacher as the provider of knowledge and the authority and the students the recipients and subordinate' (p. 3), was reported as still valid in the country. The role of the teacher needed to be reformulated and modernized.
2. Lack of system for national outside grading and not very effective system for inside grading of the quality of education – the methods that were used in the country were reported to be old and inappropriate. The subjective factor of giving grades was very much alive, also the lack of outside evaluation, lead to inability to compare the knowledge of students in the same grades, from different countries. In a way this problem was addressed with the introduction of the compulsory state exams at different level of education in 2008. This was the way to measure the knowledge and evaluate the quality of teaching in different schools and regions.

3. A huge number of infinite, early drop-outs of school – the percentage of those cases in the education system was very worrying. As already mentioned, in UNICEF's report, the main problem were the Roma children, who did not go to school. The authors of the program pointed out that this fact created severe disproportion in the level of education in particular regions and prevented integration of all ethnicities.

4. Low social status and insufficient authority of the teachers – the program pointed out that the financial, as well as the identity crisis in Bulgaria allowed for this unfair position of the teachers in the social arena. The main problems that were discussed are the low payment, low career and qualification opportunities, which led to low self-esteem and unwillingness to perform in the best possible way. The contemporary high-pace development of technology, make the teachers look in a way 'not-up-to date' and they were no longer the only opportunity of learning.

5. Suboptimal school network and high numbers of small and joint classes – the serious trouble here was the lower number of students who enroll in classes. Therefore, the authors observed that there was insufficient high number of schools, and also mismatch of the needs of the market and the provided education in some regions. Another problem was the high number of teacher, but unfortunately not qualified for the desired subjects. Additional issue were the joint classes – because of small number of students, the teachers were forced to put together children from different age and different classes, which led to insufficient teaching and learning process.

6. Over centralization of the management of the system – the policy-makers criticized the process of taking decisions – only at high management level and not by the ones, who are directly involved in the process. Due to that, the regional education policy is prevented from realization and made the system look obsolete to the society.

7. System of funding, not stimulating the development – the funding was very centralized and did not allow for proper management of individual schools. Both the nation and the different municipalities were making the same mistakes and not supporting each other in the name of the schools. This problem seem to be address at this point of time, since now the delegation budget method are already introduced and every school receives its funding on the basis of enrolled children, as well as students and teachers performance.

8. Problems with the normative system – the authors pointed the weakness in the fact that too many legal acts and regulations manage the system, which leads to mistakes and discrepancies between them.

As main aims for improving the system, were pointed out the equal access to education and quality education. If these two areas are addressed properly, the situation in the Bulgarian education system, would become way better.

The suggested measures:

1. Changes in the curriculum and school programs
2. Measures towards the textbooks and the teaching materials

3. Information and communication technologies in schools
4. Educative role of the kinder gardens
5. Ritualization of the school life
6. Transformation of the schools as students territory
7. Development of extracurricular activities

Chapter 4 Unfolding the problematique of the research questions through the neo-Gramscian perspective

The author of this paper chose to explain the nature of the posed research questions through the theories developed by the neo-Gramscian school of thought and more specifically by using the scholars research and findings on the issue of neoliberal hegemony in the case of the EU and how the power-relations between the Union and Bulgaria affected the education system.

The analysis starts with Gill's work applying the neo-Gramscian approach to EU integration. I take the initial point of *longue durée* – 'involves the patterning of habits and expectations in everyday life involving repeated actions that form regularities' (Gill, p.49). The *gestes répétés* that limits Bulgaria in a political and social manner can be traced back in the time when the country was under the 500 years old rule. A pattern can be recognized in the political behavior of the ruling class – ever since that time the country was usually under the strong influence of a more powerful player. First the Ottoman empire, afterwards Russia, followed by the USA and the EU. To a certain extend this can be explained through the fact that the country is a smaller and more insignificant player, but on a strategic location in the Balkans. A sense of fear can be noticed, and it seems like every government in the last two centuries were looking for protection and form of alliance. The path dependency in this sense is strongly recognizable and the author suggests that the reason dates much further back in the history of the country. Under the reign of King Simeon I (893-927) the country experiences it's so called 'Golden century' and from a small factor, became the most powerful country in the region. This fact seems to fit in the author's idea that the mindset of the ruling elite is such in the contemporary times. Having the example of how a super strong state tended up being under yoke for a lot of historical reasons, formed the mindset of a fear and certain desire to be protected, which is clearly the case with the membership in the EU. To a certain extend Gramsci's attempt 'to show that the theoretical and practical object of political science is the historical situation' (ibid, p. 50).

The question of hegemony in the case of education, more specifically primary education in Bulgaria can be clearly seen. Gramsci's 'equation of the relations of force' can be applied in this case. On the structural level, the transformation of society is visible in the country after the fall of the communist rule, during the building of democracy in the country. Therefore, the desire to join the European alliance was inevitable and resulted in accession in 2007. On the political level, the corporate interests were too precious to be underestimated, the question of solidarity was raised several times during the rule of the Socialist party. The consequences of these two levels result at the hegemonic moment 'when there is a consciousness that corporate interests go

beyond the specific confines of an economic group and can and must become the interests of the subordinate groups' (ibid, p.52). In the case of Bulgaria, the power exercised by the EU in the negotiation process and in the case of the education issue, though clearly hegemonic, was considered legitimate in the country. 'Also, while in a positive sense hegemony involves leadership, the active construction of consent, and the institutionalization of power (e.g., through the rule of law), in a more negative sense, it involves when necessary the use of coercion (e.g, organized violence and incarceration by the state)' (ibid, p. 52) – this statement illustrates the power-relations between the union, being the strong leader, having an absolute legitimate power in Bulgaria. So it can be concluded that the hegemonic power which the EU exercises at the moment, through imposing policies and introducing best-practices that are considered useful by the nation, gives the union an opportunity to keep the status quo and the formed hierarchy. On the strategic level, covering the military importance, according to Gill the dominance: 'was in effect the case in Eastern Europe after the collapse of communist rule' (ibid, p.53).

Back to the question of the EU education policies and their implementation in the Bulgarian educational system, one can notice that there is overlap of the problems identified by the union and by the country, but it is interesting to say that there seems to be a serious discrepancy as to what is defined as most important by the two actors. As the EU is aiming at securing the *acquis*, some of its requirements does not seem relevant in the case of Bulgaria. Here, again comes the question of hegemony and the power that EU has over Bulgaria, introduced through policies, which are expressly introduced as 'non-negotiable'. The only possible negotiation is allowed for the timing of implementation and the concrete procedure in the specific cases. Therefore, the liberal philosophy which is imposed on the Education policies is unavoidable and the country had to 'play by the rules'. It is clear from the EU regular reports, that there were and still are a lot of unclear points in the education area, but interestingly a progress was noted every year. The chapter was closed fairly quickly and the country was left to find a way to resolve the problematic issues in the area, still under the supervision of the union.

Chapter 5 Conclusion

The findings of this research are the following – the gap between the EU education policies exist due to the discrepancy of the priorities of the two actors. The global picture, covered by the EU, does not completely match the local situation in Bulgaria, therefore the gap was formed. What is interesting is the fact, that in a way both sides were satisfied with the progress of the situation – Bulgaria joined the Union, even though not only the Education chapter, but plenty others as well, were closed, regardless of the the serious issues that still were not resolved; on the other side, EU managed to impose their hegemonic rule and completely set the ‘rules of the game’. Therefore, in a way, it can be concluded that the gap that was created during the negotiation process, appear have destroyed itself and leaving the political arena open for further cases.

Notes

- All the translation from Bulgarian language were done by the author of the paper.

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