SUMMARY PROJECT FICHE

1 Basic Information

Désirée Number  BG 0102.06
Title  Social Inclusion
Sector  ESC
Location  Bulgaria

2 Objectives

2.1 Overall Objective(s):
Facilitation of the social and economic integration of the Roma, other ethnic minorities, the disabled and other disadvantaged people into Bulgarian society.

2.2 Project Purpose
Development of educational, employment and entrepreneurship measures designed to raise literacy standards and improve competencies through employment, training and business support measures for the target groups.

2.3 Accession Partnership and NPAA priority

Accession Partnership:
The project supports the objectives identified in the Social Cohesion chapter of the AP:

“Development of a national policy for economic and social cohesion”. It will also form part of the actions under the same priority, specifically, “gain experience in project cycle management for Objective 1 type programmes at regional and local levels”.

Short term priority AP 31: “Strengthen the National Council on Ethnic and Demographic Issues in order to implement measures aimed at fighting discrimination, foster employment opportunities and increase access to education.”

NPAA:

1 The project contributes to priorities and targets of the Employment and Social Affairs chapter of the NPAA. Specifically, by supporting the measures which the NPAA identifies, namely:

- “stimulating the creation of new jobs”
- “stimulating the start-up of self employed business activities”
- “vocational training for disadvantaged groups”

2 Efforts will be made for the integration of the Roma population by “fulfilling the obligations of the government on improving the Roma situation and encouraging the tolerance and mutual understanding between Bulgarian citizens from different ethnic and religious backgrounds”
2.4 Contribution to the National Development Plan (NDP)

The project has been developed in response to the NDP, Chapter 4, ‘Improving the quality of life and adapting human resources to market requirements’ and in particular:

“Strengthening Equal Opportunities, Social and economic integration of unevenly positioned groups on the labour market …. women, youths, disabled, long term unemployed and ethnic groups ….
Reducing the pressure over the system for social support by elaborating, developing and expanding of the special programmes for employment”

“Improving the Infrastructure of Initial and Continuing Vocational Education”.
“Improving the infrastructure of institutions for training of people with special needs (disabled)”.

3 Description

3.1 Background and Justification

The registered unemployment rate for persons under 29 years was 31.4%; the long term unemployed account for one third of the total unemployed\(^1\). The characteristics (November 2000\(^2\)) of youth unemployment revealed that 66% had no vocational qualifications.

Having this proportion of the population unemployed risks creating social instability through alienation and low motivation in terms of self improvement. In this group those young people with only primary or secondary education and those without vocational skills not only form the highest sub-group in terms of unemployment, but they are also at greatest risk during economic restructuring and shifts in labour market demand. In order to advance their prospects for employment it is essential that they have the opportunity to access vocational training in order to improve their skill and knowledge bases. They consequently improve their overall employability with the labour market.

Within this broad group of disadvantaged youth, the greatest effect is often felt in ethnic minority groups, in particular the Roma, and this reinforces feelings of social exclusion. Measures need to be developed to encourage social and economic integration by improving access to education and training that will better equip individuals for entry into the labour market.

The 1992 census estimated the minority Turkish population at 9.7% and the Roma population at 3.4%. Within these figures the distribution patterns varied widely with no minorities in some municipalities rising to maximum concentrations of 97.2% and 19.1% respectively. Independent demographic analyses carried out subsequently have indicated that the Roma population may have been under-enumerated, with a most realistic figure being in the 6 – 8% range. The UNDP report Bulgaria 2000 also provides evidence that ethnic groups, the Roma and also the Turkish minorities tend to live in municipalities with ‘low ‘ to ‘medium’ human development index indicators.

The Roma minority continues to suffer discrimination due to the accumulation over time of factors that have worsened their living conditions. There is political commitment from the government to remedy their problems, but more effort must be put into translating this into concrete action and major efforts and resources will be required to reverse the situation of discrimination, poor living conditions, economic hardship, chronic unemployment, poor health care, appalling housing conditions and lack of effective access to education. Though the Turkish minority is better integrated into political life through elected representation at national and local levels also a number of problems (particularly unemployment) persist.

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\(^1\) August 2000 – quoted in Strategy for Human Development – November 2000

\(^2\) National Labour Office
The disabled also form a significant minority who have problems accessing the labour market. In November 2000 a total of 8,421 were recorded as unemployed, and the trend is upward. The problems of the disabled are very different from those of the minority groups in that they have to overcome not only educational and training barriers but also problems associated with ‘physical’ accessibility to employment opportunities. Measures are required to assist the individuals in overcoming these issues and enable them to demonstrate their ability to positively contribute to the economic and social development of the country.

3.2. Linked Activities

The following activities financed by the EU Phare Programme have been implemented:
Beautiful Bulgaria Programmes 1 and 2 (1998 and 1999) created temporary employment and piloted vocational training.
Phare Civic Society (98) – Promotion of social entrepreneurship.
‘Promoting the Integration of the Roma’ (BG9907)

The following activities financed by other donors have been implemented:
Dutch bilateral aid (NAVIB Foundation) – training in basic entrepreneurial skills of minority groups and provision of small grants for entrepreneurial activity.
Catholic Relief Services – provision of small loans to Roma co-operatives in target areas.

The following activities financed by the national budget have been implemented:
Beautiful Bulgaria 3 - launched in September 2000.
Fund “Social Rehabilitation and Social Integration of Disabled” – provides vocational training, stimulus for employment of disabled and subsidies for specialised enterprises for disabled

3.3. Results

a) Roma Centres

4500 individuals trained under 300 literacy and numeracy training programmes for Roma minorities (carried out by Roma Centres, where appropriate through subcontracts)
12 existing Roma information centres with improved services by training mediators
Roma Awareness training programme developed by Roma Information centres and delivered to the public bodies in the area they serve

b) Job Creation

Development of six job creation programmes including four specifically targeting the Roma population

c) Entrepreneurship Development

Entrepreneurship training and support for 300 individuals from minority groups and the disabled

d) Support and Business Centre for the Disabled

Creation of a Business Centre for Disabled
Training of 4 specialists in the rehabilitation of the disabled into employment
Network established with VT centres in North West Region to ensure that the disabled have access to training programmes and that their special needs are recognised and provided for.
Linkages established with local business community (NW Region) that are designed to promote employment of disabled people and encourage use of self-employed persons as sub contractors.
Training programmes developed to motivate the disabled into seeking employment or self -employment.
Training packages designed to enable individuals to undertake training in their home.
Links established with special schools for the provision of advice on young adults economic potential prior to returning to the community. Specialist training programmes in the rehabilitation of the disabled into the work place developed and seminars will be held in all other regions (5) to disseminate the information.

3.4 Activities

3.4.1. Development of Roma Information and Cultural Centres (RICCs)

Whilst verifiable information relating to the Roma population poses a problem in respect of the development and implementation of programmes a series of indicators reveal the extent of marginalisation; high unemployment, poor housing, poor health and high levels of illiteracy. In response to these factors it is proposed to further develop the existing network of Roma Information and Cultural Centres (Chitaliste). Whilst retaining their existing roles, these centres will be strengthened to develop their relationship between statutory authorities, for example national and local labour offices, regional educational inspectorates, drop out centres and VT centres, employers and their organisation.

Following surveys of requirements to be carried out under BG99.19 PPF, centres will be invited to submit proposals. Up to twelve centres will be selected based on the merit of their proposals, and will be contracted (under a grant) to deliver the required services. The services can be delivered by the centres themselves, or – where appropriate – by subcontractors to the centres. The centres will be selected based upon an assessment of their proposals by the Project Evaluation Committee, and after consultation with the National Council for Ethnic and Demographic Issues (NCEDI) and Ministry of Culture.

This measure has four components:

a) Provision of Literacy and Numerical Skills Training for Roma Minorities

The absence of literacy and numeracy skills training for many members of minority groups is both a handicap to the acquisition of education and in obtaining employment. It is proposed to address this problem by targeting the ethnic minority population aged 16 years and older. High unemployment contributes to social alienation and poor motivation to break out of the cycle. Development of literacy and numeracy skills will provide the necessary foundations for later vocational training. Roma Information and Cultural Centres (RICC) will be encouraged to develop and deliver the programmes to work with local schools, regional education inspectorate and drop out centre. It is expected that at least 4,500 people will receive such training under 300 programmes (average participation per programme would be 15 persons; exact details can only be worked out following completion of labour market and social inclusion surveys under BG99.19 PPF).

b) Extension of Mediation Services

A lack of personal skills and language difficulties makes it difficult for many Roma to present themselves when dealing with official bodies and authorities. In order to improve the situation it is proposed to support the extension of mediation services with authorities and companies offered by the Information and Cultural Centres. In order to develop mediation services it will be necessary to train staff and volunteers at the centres.

c) Awareness Training for statutory authorities

Lack of awareness of Roma issues is considered a handicap to their integration into the wider Bulgarian community. In order to start addressing this issue and providing an example to the wider population it is
proposed to introduce awareness training for social welfare offices directly serving the Roma community. Training materials will be produced by Roma orientated NGOs and delivered through a series of seminars (an example for subcontracts by the RICCs). It is important that NGOs develop a single training package thereby creating a single focus of identity. Initial emphasis will be placed on national and local labour offices although the materials, once produced, would be made available to extend the initiative to other government departments, regional and municipal bodies.

d) Extension of Information Services

The Information and Cultural Centres need to extend their information services to develop proactive liaison approaches in seeking out potential employers and disseminating information to the community.

3.4.2. Job Creation Programmes

a) Job Creation for Roma and other ethnic and disadvantaged groups

This measure has two horizontal components: 1) job creation for the Roma and 2) Job creation for other ethnic and disadvantaged groups. Over 60% of the funds identified for this measure will be used to target the Roma population. The measure is designed to address the problem of long-term unemployment in the target groups and is not targeted at a specific age group.

Following the completion of a labour market survey designed to reveal local needs for these disadvantaged groups (under BG99.19 PPF) a number of regions/municipalities will be targeted by the PIU in close consultation with the NCEDI. A further factor that will be considered in the targeting process will be the proximity of other national or internationally funded programmes that have the capacity to create sustainable employment. The objective of this measure is to assist individuals in the target groups into employment, self-employment or encourage existing business expansion. It is proposed to establish a minimum of six job creation programmes.

A call for proposals will be issued to organisations capable of delivering a range of services designed to stimulate the creation of jobs for the target groups. Criteria for eligibility of applicants will be defined with close co-operation with the NCEDI and according to the results of the labour market survey which has to be completed by the end of 2001. An effort will be made to link this as closely as possible with the RICCs selected under this project, although the RICCs do not currently have the expertise to carry it out themselves. Each organisation will be required to identify potential development opportunities and the involvement of other social partners in their local programme, and specific activities to be developed locally and target outcomes. Proposals, for example could be submitted by partnerships established by unemployed for carrying out economic activities of public interest (basically acting like companies under Bulgarian law), such as providing of community services and utilities, environmental projects, etc. It is anticipated that there will be a wide diversity of enterprises and activities encouraged by this measure; some of which are likely to reflect the cultural heritage for example the revival of crafts in tourist areas, provision of communal services or trading services.

The grants for the proposals will be disbursed to firms and organisations on the basis of the number of the Roma / other ethnic and disadvantaged groups hired by the projects and the support of the local institutions. The range of activities will be designed on the basis of the results of the labour market survey, and the Project Evaluation Committee will make the selection based on detailed criteria to be defined in a manual of operational guidelines.

b) Entrepreneurship Promotion

This measure is designed to encourage entrepreneurship in ethnic minority and other disadvantaged groups, for example the disabled. The measure will be targeted on a regional basis with the regions identified
following labour market surveys that will include demographic indicators. The final decision on regional targeting will be made in conjunction with the NCEDI.

The objective is to provide entrepreneurial training and on-going consultancy and business support to individuals seeking to become self-employed or develop an existing enterprise through the employment of additional workers. This is to be delivered, following a call for proposals, by suitable institutions such as business centres, regional development agencies, VET centres or appropriately qualified private training companies. Providing on-going support and other services is crucial if the enterprise is to overcome the many problems that confront an emerging business. Although there is no research, it is felt that the emerging businesses established by minority groups are likely to be at an additional disadvantage because of prevailing social attitudes and economic constraints.

It is anticipated that the range of initiatives pursued by the participants on the programme will be varied with business plans often reflecting the desire to translate the cultural heritage into a business opportunity (like revival of crafts, tourist attractions, communal services). The measure will be launched through a call for proposals to organisations (see above) in the identified regions. They will be required to demonstrate how they can develop and deliver this initiative which will include the following elements:

Undertaking initial market surveys to identify potential business opportunity areas for the programme participants.
Development and delivery of a training programme designed to introduce or develop entrepreneurial skills.
Provision of consultancy support to assist participants in finalising their business plans, and the provision of on-going support through the start up or development period.
Provision of promotional and marketing services designed to assist the entrepreneur develop a market presence in the locality or region.

Against the contracts concluded, the implementing organisations will undertake certain obligations related to the number of jobs created and preserved, employment of representatives of disadvantaged groups, etc. (specified in the Operational Guidelines, to be prepared under the BG 99.19 PPF).

Acceptance of individuals onto the programme will be based on a selection criteria, which will include assessment of the individual’s capacity for entrepreneurship, made by an interview with the organisation – beneficiary of grant. It is expected that applicants will be at least 18 years of age. If an individual is not recommended by the organisation – beneficiary of grant / consultants for the programme they will receive career counselling in order to provide them with a personal development path.

**Creation of a Support and Business Centre for the Disabled.**

There is an urgent need to establish a range of services designed to facilitate the integration of the disabled into the labour market and in particular address issues of re-employment, employment and the creation of entrepreneurial approaches. It should be stressed that these activities should be carried out within the mainstream business environment. In order to address the identified issue areas a number of measures need to be addressed.

The implementation of the measure will be based upon the results of a feasibility study which will be made under the BG 99.19 PPF. Following the identification of the location for the centre the appropriate accommodation will need to be refurbished to disability standards. Geographical considerations will require the establishment of regular ‘outreach’ sessions to be held in other towns. Where it is considered appropriate, the local labour office shall provide outreach services. Where, because of disability or transport problems individuals are unable to attend the centre, staff will provide services in their own home.

The Centre should be viewed as a business resource centre designed to advance the needs of the disabled. It is proposed to upgrade an existing building to disability standards. The Centre will provide basic office type
accommodation, a training/seminar facility and an assessment facility. The staff of the Centre will include specialists who will undertake assessments and support individuals in job seeking and training and a small core of support staff. The support staff who will require training, will concentrate on raising awareness and developing employer networks. It is proposed that these posts be filled on the basis of positive discrimination in favour of disabled persons. This approach is designed to demonstrate the abilities of the disabled in an employment situation.

The Centre will be managed by an NGO established to develop services for the disabled in the Region. The membership will include the municipality, representatives of employers associations and trade unions, and the relevant organisations of disabled in the region. It is essential that the disabled are well represented on the Board of Management as only they can have the expertise to guide the development of the services. This measure is designed to build on the existing expertise of NGOs already active in this sector.

**Component 1:**
Development of specialist expertise in the assessment of disability and employment opportunities.

Within this component it is proposed to appoint and train four specialists from the region where the centre is located through an attachment to a disability and integration service in one of the member states. During the course of this attachment they will be introduced to the latest assessment techniques and experience the opportunities offered by multi-disciplinary working in meeting the needs of the disabled person. On completion of their training they will use their acquired skills in developing the Centre’s services with the objective of increasing their effectiveness by introducing new assessment techniques designed to assist in the matching of individuals with jobs and in long term career planning and development.

The trained specialists will also be expected to:

- Develop and cascade short training programmes designed to ensure that learnt skills and knowledge in further disseminated through Bulgaria.
- Develop linkages with local VT centres in order to encourage the provision of training to the disabled.
- Develop links with special schools within their area and seek to provide assessments on children prior to their return to the community with the objective of assisting in the development of long term personal development plan.

**Component 2**
Development of Link with local businesses

This measure appears crucial if there is to be any significant improvement in increasing employment opportunities for the disabled. Extensive promotion of the needs of the disabled and their abilities in the workplace needs to be carried out. Creation of links and building confidence with SMEs is seen as crucial to the overall process. Actions will include:

- Providing seminars on the legal framework for employing disabled people.
- Brokering employment of individual disabled people into appropriate employment positions
- Assisting the self employed to gain access to sub contracts with other SMEs

This component reflects the HRD strategy and in particular measure 4.2 ‘stimulation of employers to hire unemployed persons’.

**Component 3**
Facilitating Training and Employment of Individuals
Successful action on components 1 and 2 will need to be complemented by in facilitating training, or retraining, and in placement of individuals in paid employment. This component reflects measure 13.1 in the HRD strategy ‘facilitating the integration of the disabled ….’

The centre will work closely with the VET centres in the region in order to ensure that there is access for the disabled to training resources. In addition the Centre will develop training programmes designed to motivate the disabled into entering or re-entering employment or in establishing themselves as self-employed persons. Motivated individuals may also be able to access a training place on ‘Developing your own Business’ in the 2001 labour Market Initiatives Project. As mobility is often a major issue for the disabled the Centres will also develop flexible learning packages that can be used in the ‘clinic’ or at home. It is envisaged that the programmes, once developed will be made available to other NGOs involved with disabled.

Specialists and support staff will also assist in brokering employment of individuals within companies. In order to ensure that employers are not disadvantaged by employing a disabled person, additional costs, for example the provision of a ramp could be financed through a small dedicated grant.

Throughout their employment the specialists will monitor the progress of persons placed by them. This is designed to reinforce the relationship with the employer and to provide support to the individuals.

4. Institutional Framework

The Ministry of Regional Development and Public Works (MRDPW) is the Implementing Agency for the PHARE programme economic and social cohesion projects in Bulgaria.

The MRDPW will implement the project through its Directorate General Regional Development and Administrative Territorial Organisation (RDATO) and the PAO will be responsible for sound administrative and financial management of the project, including tendering, contracting, administration, accounting, payment and reporting procedures and monitoring of the project implementation.

The technical implementation of the project is a responsibility of the Ministry of Labour and Social Policy (MLSP).

To facilitate effective technical implementation the MLSP will establish: Project Steering Committee (PSC) and Project Implementation Unit (PIU).

The Senior Programme Officer (SPO) is:

Mr. Dimitar Matev
Head of International Programmes Department
Ministry of Labour and Social Policy
2 “Triaditsa” St.,
Sofia 1000, Bulgaria
Phone: (+359 2) 933 24 62; 933 25 33
E-mail: dmatev@mlsp.government.bg
5. Detailed Budget

SOCIAL INCLUSION

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6. Implementation Arrangements

6.1. Implementing Agency
The Implementing Agency (IA) is the Ministry of Regional Development and Public Works

MoRDPW
PAO Mr. Vassil Garnizov, Deputy Minister
Cyril and Metodius St 17-19
1202 Sofia
Phone: +359 2 940 59
Fax: +359 2 987 40 77

Should the total cost of the equipment exceed the estimate shown in the table above, the beneficiary institution will provide the necessary additional co-financing.
Implementation Arrangements
The technical implementation of the project is the responsibility of the Ministry of Labour and Social Policy (MLSP).

The project will be managed as one grant scheme with four sub-measures. As a general rule, the project measures will be made public in the regions through the regional employment councils, regional co-ordinators of the PIU (and others, see below); together with a call for proposals directed at institutions / organisations interested in carrying out the activities. Regional co-ordinators will receive proposals and regional committees of assessors will check them formally, and then forward them to the PIU. Selection will be recommended by a project evaluation committee (including project consultants) on the basis of a strict set of criteria. Final approval rests with the steering committee. Project management will have to adhere to a manual of operational guidelines, which is to be developed under BG99.19. PPF. The Delegation must approve the financial control arrangements before the grant scheme starts.

Project Steering Committee
The Project Steering Committee (PSC) will provide strategic project directions and guidance of the PIU. The PSC will be the body to which all, important decisions concerning technical and professional aspects are referred. The PSC will also ratify the appointment of regional co-ordinators (staff of the PIU) to work closely with the stakeholders at that level.

The PSC will comprise representatives of relevant stakeholders:

- MRDPW (2)
- MLSP (2)
- MES (1)
- National Council for Ethnic and Demographic Issues (1)
- Ministry of Culture
- National Employment Service (1)
- National Agency for Vocational Education and Training (1)
- EU Delegation – Sofia (1)
- SME Agency (1)
- Bulgarian Chamber of Commerce (1)
- Bulgarian Industrial Association (1)
- “KNSB” trade union (1)
- “Podkrepa” trade union (1)
- Representative of Disabled NGO(s)
- Representative of Roma NGO(s)

The role of the NCEDI is crucial to the success of the programme by providing specialist insight to the issues concerned with ethnic minorities. In view of its position the NCEDI will have a decisive vote in case of parity of votes on any proposal it deems to be detrimental to the needs of the ethnic minorities within Bulgaria.

The Project Implementation Unit (PIU)

The PIU will be responsible for the day-to-day technical implementation of the project. The PIU will comprise staff from the MLSP seconded by experts of the NCEDI. Other specialists, including external advisers will be included in the PIU structure as required.

The PIU will be responsible for the technical evaluation of all proposals submitted to it from Regional Committees of assessors, and will submit its comments to the Project Evaluation Committee.

Project Evaluation Committee

Members of the Project Evaluation Committee (PEC) will be representatives of the MRDPW, MLSP, NCEDI, MES, EU Delegation and Roma and NGOs representing the disabled. They have to be leading experts in the areas covered by the project. Furthermore, project consultants will assist the PEC. On the basis of selection criteria, designed in the operational guidelines, PEC shall approve proposals and forward them to the PSC.
which will have the final decision. After the approval the projects are to be sent for consideration to the EU Delegation in Sofia.

Regional Co-ordinators

Selected by the PIU and appointed by the MLSP the Regional co-ordinators will operate from labour offices in relevant district offices. The Regional Co-ordinators will need to build up effective linkages with a broad range of individuals and organisations (Appendix 4). Individuals appointed to these positions will need to have a wide range of management skills and experience in dealing with state institutions, the private sectors, NGOs, community groups and other social partners. They will, with the help of the labour offices, develop an effective marketing programme for the project and the various sub-components.

Regional involvement in the project

The success of this overall process, however, will be influenced by the extent to which local actors and in particular members of the ethnic minority communities and support groups for the disabled have ownership of the measures. In this context the Regional Co-ordinator is crucial to the project’s success. The Regional Employment Committee (REC) with its broadly based membership (on tripartite partnership) will nominate members to serve on the Regional Committees of Assessors (RCA). In nominating individuals to serve on the Regional Committees of Assessors the REC will take into account the need to have representation from individuals with experience of working with disadvantaged and marginalised groups. The RCA will undertake the assessment of proposals for administrative compliance and eligibility and rank them in order of preference (this will be one of the criteria by which the Project Evaluation Committee will make the final decision).

Other Implementation Arrangements / Project Publicity

The project implementation will be supported by all key institutions, participants in the Project Steering Committee. The project will be made public through the MLSP, NCEDI, Economic and Social Cohesion Committees (ESCC) established in the six planning regions; Regional Employment Councils (tripartite partnership based), Regional Employment Offices, Labour Offices and the members of the Bulgarian Association of Regional Development Agencies and Business Centres (BARDA).

The results of the labour market survey will be instrumental for the identification of target regions and detailed contents of the individual measures.

Memorandums of Understanding

The arrangements for implementing this project will be the subject of Memorandums of Understanding between the MRDPW and the MLSP and the MLSP and the NECDI.

It is anticipated that these arrangements will ensure the effectiveness of the project management process and maximise the level of resources available for the specified activities.

Technical Assistance

The overall complexity of the project involving the Ministries of Labour and Social Policy and National Council for Ethnic and Demographic Issues in project management means that it would benefit from the provision of international technical assistance. It is estimated that the work would require the services of experienced EU experts to deal with specific measures in the programme. Funding has been identified for this in the budget.
6.2. Twinning

Not Applicable

There are no non-standard elements to the project and the Practical Guide will be followed in respect of all contracting and grants.

6.4. Contracts

One TA contract will need to be awarded as follows:
managing of the grant scheme, (0.200 Meuro for the TA)

The project will be managed as one large grant scheme. Under the various components, a number of grant contracts will need to be agreed:

12 contracts for Roma Information and Cultural Centres
Approximately 40-50 contracts for Job Creation Programme (25-30 for Roma and 15-30 for other minorities groups);
Approximately 20 contracts for the Entrepreneurship Programme
One Contract for supplies and refurbishment works for the Business Support Centre for the Disabled (total value of 0.130 Meuro);
Management of the Business Support Centre for Disabled (BSCD estimated cost 0.278 Meuro)

The following table provides an overview:

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<thead>
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<th>Type of contract</th>
<th>#</th>
<th>Project component</th>
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<td>Job creation - Other Groups</td>
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<tr>
<td></td>
<td>4</td>
<td>Entrepreneurship Promotion</td>
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7. Implementation Schedule

Commencement of Project                      January 2002
Start of Tendering/Calls for Proposals       March 2002
Start of Project Activity                    November 2002
Project Completion                           December 2004

8. Equal Opportunity

The project will be implemented according to the regulations of Bulgarian law providing equal opportunity for men and women to participate in all aspects of education and training.

9. Environment                               No impact

10. Rates of return

Rates of return can only be calculated for individual components approved under this project.
11. Investment Criteria

11.1 Catalytic Effect(s)

Literacy and numeracy training will assist members of the minority communities integrate into the wider Bulgarian community and prepare them for economic activity. Measures associated with the development of Roma Centres and improvements in the delivery of education services will also facilitate this process.

Entrepreneurship will assist in the process of economic integration of minority groups by reducing unemployment and reducing the culture of dependency. Job creation programmes and the Business and Support Centre for the disabled will encourage skill development and encourage and facilitate participation (inclusion) in the labour market thereby encouraging economic inclusion and reducing social isolation.

11.2 Co-financing

The project is based upon co-financing between Phare and the National Government on a 75:25 basis.

11.3 Additionality

EC finance will be additional to that allocated to the national scheme through the Bulgarian national budget.

11.4 Project readiness and Size

The project budget exceeds the 2 MEURO for investment projects. The lessons learnt from the Beautiful Bulgaria project will assist in developing elements of this programme. For the majority of this elements in this programme the final decision on targeting of funds will be made following the completion of surveys to be completed using PPF Funds during 2001. The business and support service has been targeted in the NW Region and work will be required to stimulate NGOs in this area.

11.5 Sustainability

All aspects of the programme will be sustained through a mixture of funding arrangements including national budgets, the development of NGO support services, as indicated in the Bulgarian framework programme for advancing Roma people and other minorities.

11.6 Compliance with state aids provisions

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

11.7 Contributions to the National Development Plan

The contributions of this project towards the NDP are illustrated in 2.4 above.

12. Conditionality and sequencing

The project cannot commence until the EU Delegation is satisfied with the capacity of both the Implementing Agency and the Beneficiary. Both Ministry of Regional Development and Public Works (Implementing Agency) and the Ministry of Labour and Social Policy (Beneficiary) will have to demonstrate to the Commission that adequate staffing and other resources have been made available to the relevant PIU for the
project to begin. An operational guideline will have to be elaborated prior to the project start and the Delegation must approve the financial control arrangements.

The Memorandum of Agreement between the MRDPW and MLSP needs to be concluded. A further Memorandum of understanding will need to be developed between the MLSP and NCEDL. Linkages need to be developed with members of the minority groups identified in the project in order its progress.

Labour market surveys need to be completed by the Autumn 2001 and the targeting assessment completed prior to the formal commencement of the project. To facilitate the decision making process and ensure that preparatory work is completed on time the PIU and the PSC will be established by the end of 2001.

Key Milestones

Consultation with social partners
Completion of Labour Market Surveys – Autumn 2001
Identification of target regions and areas
Establishment of PSC and PIU – by December, 2001
Establishments of Regional Networks
Marketing and development of the measures
Finalisation of operational procedures
Calls for proposals and entry into the contracting phase.
Implementation of activities
Mid term evaluation report.

Annex 1 Logical Framework
Annex 2 Detailed Implementation Chart
Annex 3 Contracting and disbursement schedule by quarters
Annex 4 Institutional Arrangements
Annex 5 Lists of relevant Laws and Regulations
## LOGFRAME PLANNING MATRIX FOR

### Project “Social Inclusion 2001”

<table>
<thead>
<tr>
<th>Overall Objective</th>
<th>Objectively verifiable indicators</th>
<th>Sources of Verification</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilitation of the social and economic integration of the Roma, other ethnic minorities, disabled and the disadvantaged into Bulgarian society.</td>
<td>Greater inclusion of minority ethnic groups in the labour market and changes in the number of unemployed in the disadvantaged group. Greater inclusion of disabled people in the labour market and changes in the number of unemployed in the disabled. Number of new businesses and additional jobs created by the target groups.</td>
<td>National Statistics Institute Reports National Employment Service Reports Labour Market Surveys in target regions Reports of Roma NGOs Report of NGOs of disabled</td>
<td>Economic and social climate remains responsive to the needs of the target group</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Purpose</th>
<th>Objectively verifiable indicators</th>
<th>Sources of Verification</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development of educational, employment and entrepreneurship measures designed to raise literacy standards and improve competencies through employment, training and business support measures for the target groups.</td>
<td>Number of centres, range of activities and training programmes provided Number of education and training programmes for disadvantaged groups. Number of sustainable jobs created</td>
<td>National Statistics Institute Reports National Employment Service Reports Service providers reports Contract monitoring reports Labour Market Surveys in the targeted regions/municipalities</td>
<td>-</td>
</tr>
</tbody>
</table>

Contracting period expires 30 November 2003 Disbursements period expires 30 November 2004 Total budget: 4.863 m Euro Phare Budget: 3.700 m Euro
<table>
<thead>
<tr>
<th>Results</th>
<th>Objectively verifiable indicators</th>
<th>Sources of Verification</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roma Centers</td>
<td>4500 members of Roma population attending and successfully completing literacy and numeracy training programmes in the target areas.</td>
<td>Service providers reports</td>
<td>Ability to motivate members of disadvantaged groups including NGOs to participate in the programme.</td>
</tr>
<tr>
<td></td>
<td>Number of staff/volunteers trained as mediators</td>
<td>Contract monitoring reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of mediations undertaken by Roma information centres</td>
<td>National Employment Service Reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of public officials undertaking awareness training</td>
<td>Labour Market Surveys</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of jobs created</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number &amp; % of people from target groups completing VET programmes who have been employed over 6 months requiring skill provided during training.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of people from target groups obtained employment until 6/12 months following the completion of training courses.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of disabled and members of ethnic minorities establishing their own businesses following participation in the entrepreneurship programme.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B) Job Creation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development of 6 job creation programs including four specifically targeting the Roma population.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C) Entrepreneurship Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entrepreneurship Training and support for 300 individuals from minority groups and the disabled.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Support and Business Centre for Disabled established
- 4 specialists trained
- VET network established
<table>
<thead>
<tr>
<th>Social Inclusion</th>
<th>MLSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>D) Support and Business Center for the Disabled</td>
<td>Number of disabled attending and successfully completing vocational training programme in the target areas.</td>
</tr>
<tr>
<td>Creation of a Support and Business Centre for Disabled</td>
<td>Number of training seminars delivered to local businesses</td>
</tr>
<tr>
<td>Training of 4 specialists in the rehabilitation of the disabled into employment</td>
<td>Number &amp; % of disabled people completing VET programmes who have been employed over 6 months requiring skill provided during training.</td>
</tr>
<tr>
<td>Network established with VET centres to ensure that the disabled have access to training programmes and that their special needs are recognised and provided for.</td>
<td>Number of disabled people obtained employment until 6/12 months following the completion of training courses.</td>
</tr>
<tr>
<td>Linkages established with local business community that are designed to promote employment of disabled people and encourage use of self-employed persons as sub contractors.</td>
<td>Number of links established with special schools</td>
</tr>
<tr>
<td>Training programmes developed to motivate the disabled into seeking employment or self-employment. Training packages designed to enable individuals to undertake training in their home.</td>
<td>Number of training programmes delivered</td>
</tr>
<tr>
<td>Links established with special schools for the provision of advice on children economic potential prior to returning to the community</td>
<td></td>
</tr>
<tr>
<td>Specialist training programmes in the rehabilitation of the disabled into the work place developed and seminars held in all other regions (5) to disseminate the information.</td>
<td></td>
</tr>
</tbody>
</table>
### Activities

1. **Development of Roma Information and Cultural Centres**
   - Selection of target areas
   - Development and delivery of Numeracy training
   - Extension of Mediation Services (training of staff and volunteers)
   - Awareness Training for statutory authorities

   **Extension of Information Services**
   - Job Creation for Roma, Ethnic Minorities and other Disadvantaged Groups
   - Selection of target areas
   - Selection of NGOs

2. **Entrepreneurship Promotion**
   - Selection of target areas
   - Selection of organisations

   **Marketing of the measure to the target communities and groups within the region.**

   **Undertaking initial market surveys to identify potential business opportunity areas for the programme participants.**

   **Development and delivery of a training programme designed to introduce or develop entrepreneurial skills.**

   **Provision of consultancy support to assist participants in finalising their business plans, and the provision of on-going support through the start up or development period.**

   **Provision of promotional and marketing services designed to assist the entrepreneur develop a market presence.**

   **Creation of a Support and Business Centre for the Disabled.**
   - Selection of NGOs that will run the centres
   - Selection of towns where the outreach services will be provided
   - Training of staff

   **Development of specialist expertise in the assessment of disability and employment opportunities.**

   **Develop and cascade short training programmes designed to ensure that learnt skills and knowledge in further disseminated through Bulgaria.**

### Means

- Grants to RICC’s to improve the range of services provided.
- Grants for the development and management of job creation programmes
- Grants for beneficiaries – organizations which will develop and provide the services under the measure
- Contracts with the participants (employers)

### Assumptions

- Sufficient members of minority communities are motivated to attend training programmes.
- That appropriate physical facilities can be found to develop business centres for the disabled.
- Availability of skills to assist and support disabled in the process of assimilation into the labour market and wider community.
- Accessibility of facilities to target groups.
- Positive public attitude to the employment and integration of disabled people into the labour market.
<table>
<thead>
<tr>
<th>Social Inclusion</th>
<th>MLSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop linkages with local VET centres in order to encourage the provision of training to the disabled. Develop links with special schools within their area and seek to provide assessments on children prior to their return to the community with the objective of assisting in the development of long term personal development plan. Development of link with local businesses Seminars on the legal framework in relation to the employment of disabled people. Brokering employment of individual disabled people into appropriate employment positions Assisting the self-employed to gain access to sub contracts with other SMEs</td>
<td>Grant for the management and provision of services by the Center Works and supply contract</td>
</tr>
<tr>
<td><strong>Facilitating Training and Employment of Individuals</strong> Establishment of networks with training providers and employers</td>
<td></td>
</tr>
<tr>
<td><strong>Preconditions</strong></td>
<td></td>
</tr>
<tr>
<td>Completion of the labour market survey by Autumn 2001 Targeted regions/municipalities identified before project commencement. Adequate legislative provision to enable economic and social inclusion Development of active partnerships with disabled and ethnic group</td>
<td></td>
</tr>
</tbody>
</table>
### IMPLEMENTATION CHART – SOCIAL INCLUSION

<table>
<thead>
<tr>
<th>Components</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
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<tbody>
<tr>
<td></td>
<td>J</td>
<td>F</td>
<td>M</td>
<td>A</td>
</tr>
<tr>
<td>Operational PIU</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Operational PSC</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Pre-contract preparatory work completed by ……</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Tendering and Calls for Proposals</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Project Activity</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Monitoring and Evaluation</td>
<td>X</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Mid Term Report</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Final Evaluation</td>
<td>X</td>
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### Appendix 3

**CONTRACTING AND DISBURSEMENTS SCHEDULES**

**Social Inclusion**

<table>
<thead>
<tr>
<th>Date</th>
<th>31/03/02</th>
<th>30/06/02</th>
<th>30/09/02</th>
<th>31/12/02</th>
<th>31/3/03</th>
<th>30/06/03</th>
<th>30/09/03</th>
<th>31/12/03</th>
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</thead>
<tbody>
<tr>
<td>Contracted</td>
<td>2.233</td>
<td>4.283</td>
<td>4.863</td>
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<tr>
<td>Disbursed</td>
<td>1.033</td>
<td>1.513</td>
<td>1.903</td>
<td>2.233</td>
<td>2.746</td>
<td>3.126</td>
<td>3.466</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>31/03/04</th>
<th>30/06/04</th>
<th>30/09/04</th>
<th>31/12/04</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracted</td>
<td>3.866</td>
<td>4.246</td>
<td>4.586</td>
<td>4.863</td>
</tr>
<tr>
<td>Disbursed</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Figures in Meuro
Appendix 4
Institutional Framework

- Project Steering Committee
  - Project Implementation Unit
    - Senior Programme Officer
    - Regional Project Coordinators
  - Regional Project Coordinators
    - Operational Linkages
      - Municipalities
      - Region Education Inspection
      - Employer Associations
      - Trade Unions
      - Regional Employment Service
      - Specialist NGO’s

- Project Evaluation Committee
  - Regional Committee of Assessors
    - Nominated by Regional Employment Committee

NATIONAL LEVEL
REGIONAL LEVEL
REGIONAL LEVEL